Intermediate Capital Group Plc (ICP:LN)

Financials/Asset Managers and Custodians | Price: 2,060.00 | Report Date: March 27, 2024

Business Description and Key Statistics

Intermediate Capital Group plc is a United Kingdom-based global alternative asset manager. The Company manages capital on behalf of its global client base, principally across long-term closed-end funds. It provides various capital solutions for corporates and owners of real assets, and creates value for stakeholders, shareholders and communities. The Company operates through two segments: the Fund Management Company (FMC) and the Investment Company (IC). The Company operates across four asset classes, which include structured and private equity, private debt, real assets, and credit. Its structured and private equity consists of providing structured and equity financing solutions to private companies. Its private debt consists of providing debt financing to corporate borrowers. Its real assets consist of providing financing solutions in the real estate and infrastructure sectors. Its credit includes investing in primary and secondary public credit markets.

Website:	https://www.icgam.com/
ICB Industry:	Financials
ICB Subsector:	Asset Managers and Custodians
Address:	Procession House, 55 Ludgate Hill LONDON EC4M 7JW GBR
Employees:	582

	Current	YTY % Chg
Revenue LFY (M)	656	11.1
EPS Diluted LFY	0.97	24.2
Market Value (M)	5,987	
Shares Outstanding LFY (000)	290,613	
Book Value Per Share	7.26	
EBITDA Margin %	61.20	
Net Margin %	48.0	
Long-Term Debt / Capital %	72.8	
Dividends and Yield TTM	0.78 - 3.79%	
Payout Ratio TTM %	54.1	
60-Day Average Volume (000)	1,257	
52-Week High & Low	2,099.00 - 1,152.00	
Price / 52-Week High & Low	0.98 - 1.79	

Price, Moving Averages & Volume



Intermediate Capital Group Plc is currently trading at 2,060.00 which is 10.5% above its 50 day moving average price of 1,864.42 and 34.1% above its 200 day moving average price of 1,536.26.

ICP:LN is currently 1.9% below its 52-week high price of 2,099.00 and is 78.8% above its 52-week low price of 1,152.00. Over the past 52-weeks, ICP:LN is up 78.8% while on a calendar year-to-date basis it is up 22.6%.

The Relative Strength Index (RSI) indicator for ICP:LN is currently 67.24. An RSI value of 70 and above is considered overbought and 30 and below oversold.

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Price Performance, Technical Indicators & Risk Metrics

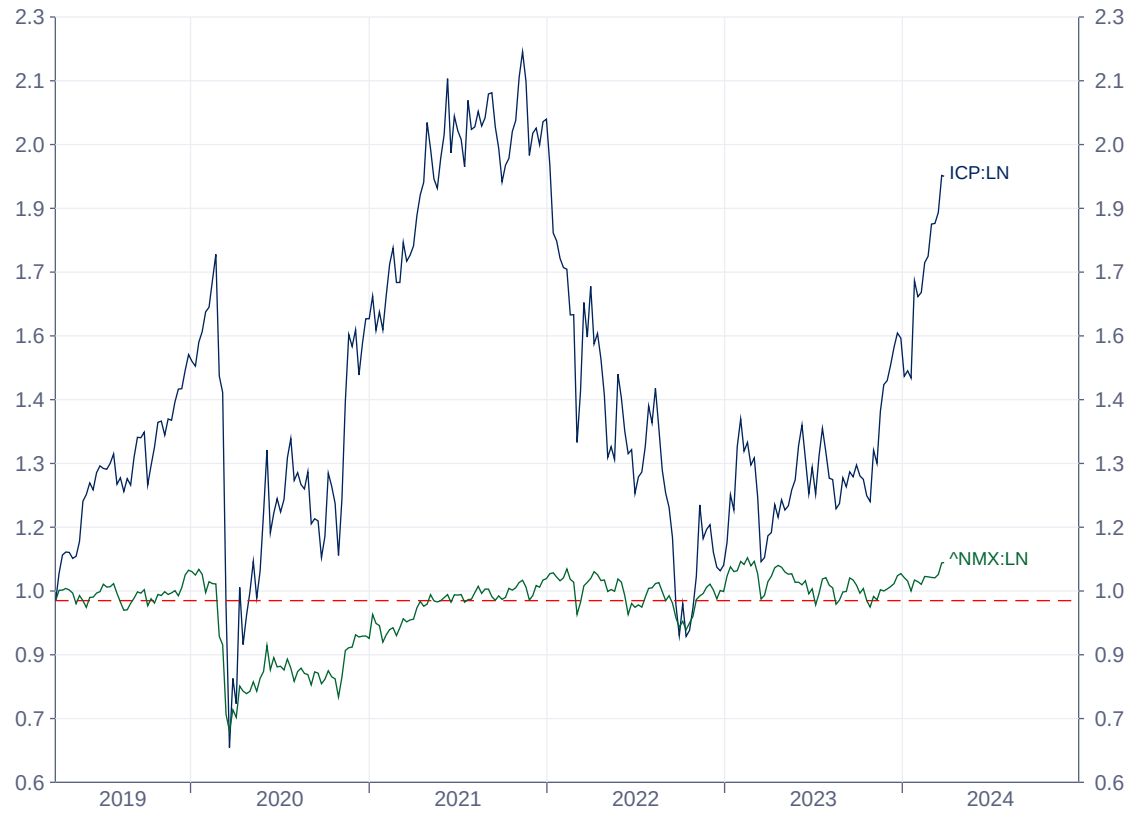
Price Performance	% Change	Difference vs FTSE 350
1-Day %	-1.86	-1.89
1-Week %	4.15	1.75
4-Week %	9.43	5.38
52-Week %	78.82	72.60
Quarter-to-Date %	22.58	20.29
Year-to-Date %	22.58	20.29
Last Month %	7.81	8.04
Last Quarter %	21.51	19.03
Last Calendar Year %	46.39	42.51

Technical Indicators	
50-Day Average Price	1864.42
Price / 50-Day Average	1.10
200-Day Average Price	1536.26
Price / 200-Day Average	1.34
RSI - Relative Strength Index	67.24

Risk Metrics	
Price Volatility	51.32
Sharpe Ratio	0.14
Sortino Ratio	0.23

5-Year Price Performance vs. FTSE 350

Intermediate Capital Group Plc — Current: 1.93 CAGR: 14.1%
FTSE 350 Index — Current: 1.08 CAGR: 1.6%



Over the past five years, Intermediate Capital Group Plc's stock price is up 93.4% which is 85.0% above the FTSE 350 Index performance of 8.4% over the same period. Intermediate Capital Group Plc's cumulative annualized growth rate (CAGR) over the five year period has been 14.1% while that of the FTSE 350 Index has been 1.6%.

Over the past year, Intermediate Capital Group Plc's stock price performance of 78.8% has outperformed that of the FTSE 350 Index by 72.6%. On a year-to-date basis, Intermediate Capital Group Plc's stock price performance of 22.6% has outperformed the FTSE 350 Index by 20.3%.

Over the past week, Intermediate Capital Group Plc's stock price performance of 4.2% has outperformed that of the FTSE 350 Index by 1.8%.

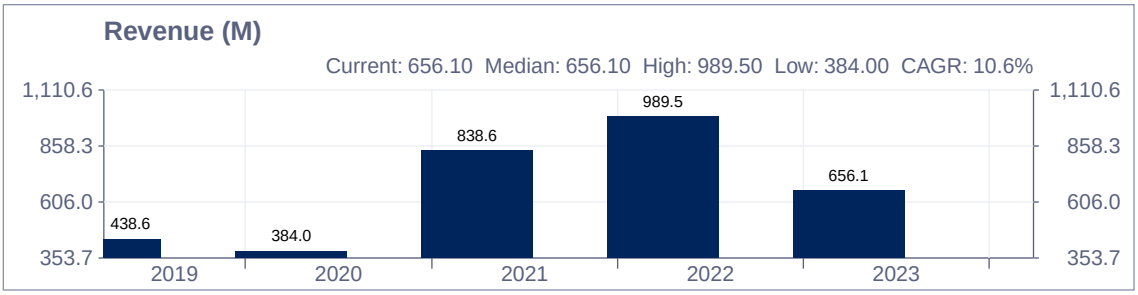
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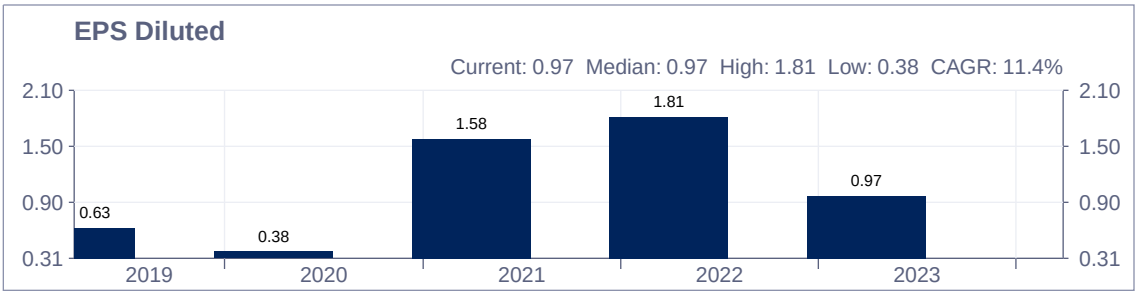
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Growth and Profitability Metrics

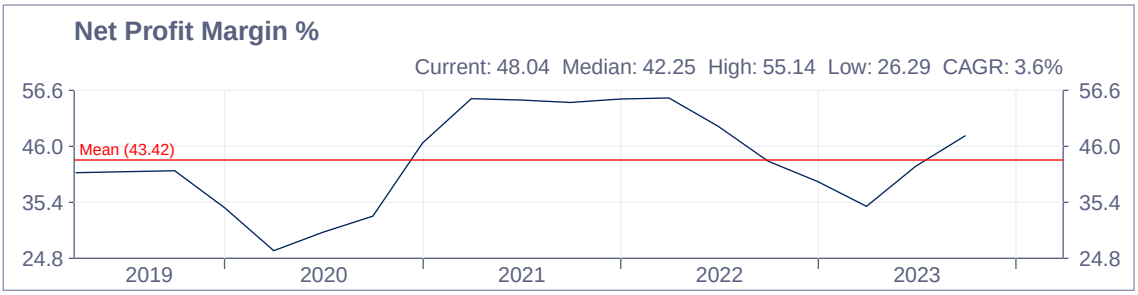
Historical Growth	3-Year	5-Year	10-Year	Profitability	Current	5-Year Average	10-Year Average
Revenues %	22.3	8.5	5.4	**Gross Margin %**	88.6		
Revenues Per Share %	21.7	8.1	5.6	**EBITDA Margin %**	61.2	54.8	55.3
EBITDA %	32.0	11.9	7.4	**Pre-Tax Margin %**	55.6	46.4	41.6
EPS Diluted %	38.1	7.6	7.3	**Net Margin %**	48.0	43.4	40.2
Free Cash Flow %	70.4	999.9	-15.5	**Return on Equity %**	20.8	19.7	17.3
Cash from Operations %	46.6	999.9	-14.4	**Return on Capital %**	5.2	4.5	4.7
Book Value %	15.4	9.0	3.9	**Return on Assets %**	4.6	4.1	4.3



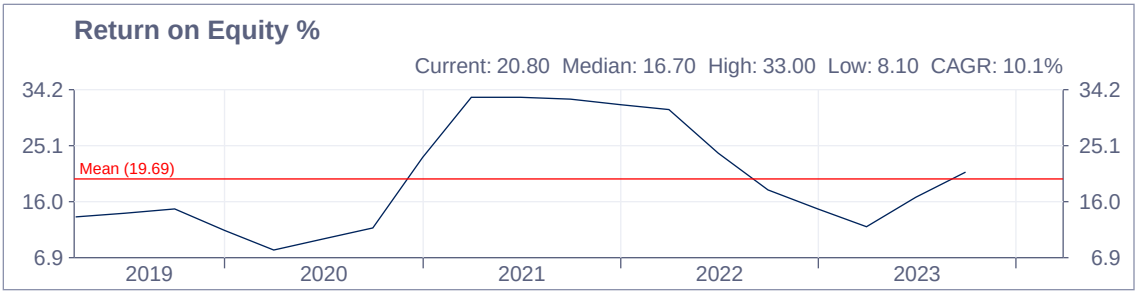
Intermediate Capital Group Plc's cumulative annualized revenue growth rate over the charted period is 10.6%. This compares to cumulatative annualized growth of 22.3% over the past 3 years.



Intermediate Capital Group Plc's cumulative annualized EPS growth rate over the charted period is 11.4%. This compares to cumulatative annualized growth of 38.1% over the past 3 years.



Intermediate Capital Group Plc's net profit margin of 48.0% is 4.6% above the period's mean net margin of 43.4%. During the charted period, the observed net profit margin high and low were 55.1% and 26.3% respectively.



Intermediate Capital Group Plc's return on equity of 20.8% is 1.1% above the period's mean return on equity of 19.7%. During the charted period, the observed ROE high and low were 33.0% and 8.1% respectively.

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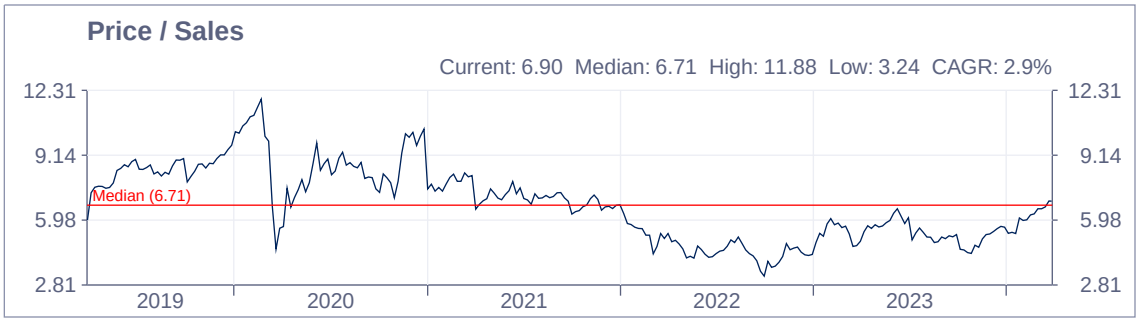
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Valuation Metrics

	Current	5-Year Median	10-Year Median		Current	5-Year Median	10-Year Median
Price / EPS TTM	14.4	13.5	12.6	**Earnings Yield %**	7.66	7.48	7.96
Price / Sales	6.9	6.7	5.4	**Free Cash Flow Yield %**	0.60	0.91	0.00
Price / Operating Cash Flow	14.0	13.2	14.2	**Dividend Yield %**	3.79	3.72	3.19
Price / Book Value	2.8	2.8	2.4	**Enterprise Value / EBITDA**	21.2	22.3	19.7



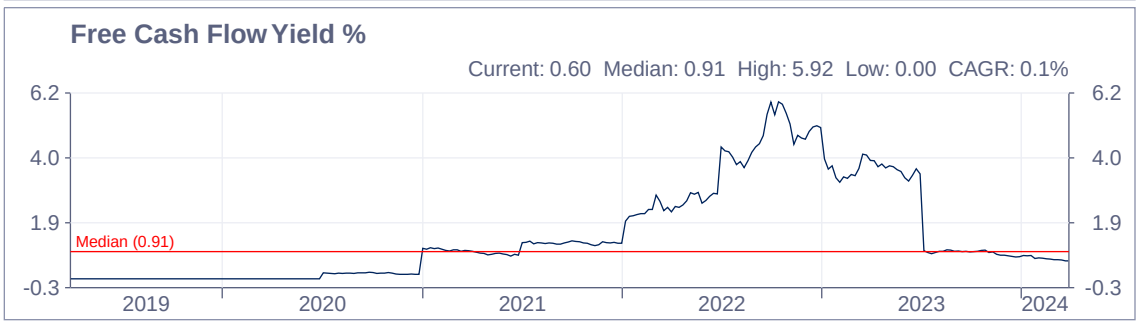
Intermediate Capital Group Plc is trading at 14.37 times its EPS generated during the latest fiscal year. This multiple is above the historically observed median of 13.52, while high and low observations have been 37.06 and 6.50.



Intermediate Capital Group Plc is trading at a Price to Sales ratio of 6.90 based on sales generated during the latest fiscal year. This ratio is above the historically observed median ratio of 6.71, while high and low observations have been 11.88 and 3.24.



Intermediate Capital Group Plc is trading at a Price to Book ratio of 2.84 based on book value at the latest fiscal year end. This ratio is above the historically observed median of 2.76, while high and low observations have been 4.17 and 1.47.



Intermediate Capital Group Plc has a Free Cash Flow Yield of 0.60% based on free cash flow generated during the latest fiscal year. This value is below the historically observed median yield of 0.91%, while high and low observations have been 5.92 and 0.00.

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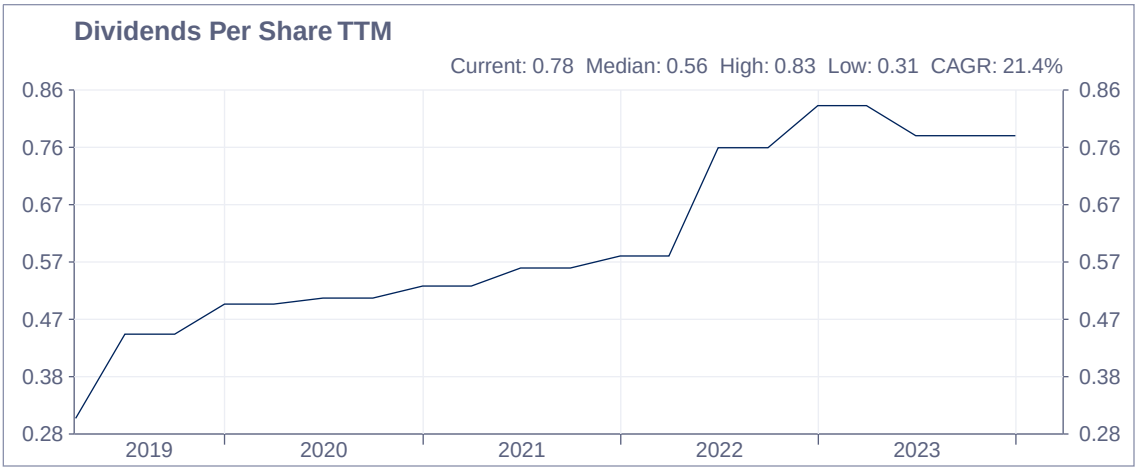
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Dividends Data

Dividends Per Share TTM	0.78	**Payout Ratio TTM %**	54.06%	**Dividend Yield TTM %**	3.79%

Rate	Ex Date	Record Date	Payment Date	Currency	Note
0.258	07-12-2023	08-12-2023	08-01-2024	GBP	
0.522	15-06-2023	16-06-2023	04-08-2023	GBP	
0.253	08-12-2022	09-12-2022	09-01-2023	GBP	
0.573	16-06-2022	17-06-2022	05-08-2022	GBP	
0.187	09-12-2021	10-12-2021	10-01-2022	GBP	
0.390	17-06-2021	18-06-2021	05-08-2021	GBP	
0.170	10-12-2020	11-12-2020	08-01-2021	GBP	
0.358	18-06-2020	19-06-2020	05-08-2020	GBP	
0.150	05-12-2019	06-12-2019	14-01-2020	GBP	
0.350	13-06-2019	14-06-2019	06-08-2019	GBP	
0.100	06-12-2018	07-12-2018	10-01-2019	GBP	
0.210	14-06-2018	15-06-2018	07-08-2018	GBP	

Dividend Growth and Yield



Intermediate Capital Group Plc's trailing 12-month dividend per share is 0.78 and its dividend has grown at a cumulative annualized rate of 21.4% over the charted period. This compares to dividend growth of -5.60% over the past year and cumulative annualized growth of 13.90% over the past 3 years.



Intermediate Capital Group Plc's current dividend yield is 3.79% based on trailing 12 month dividends. The current yield is above the historically observed median of 3.72% and, over the charted time period, the observed high yield has been 7.75% and the observed low yield has been 2.24%.

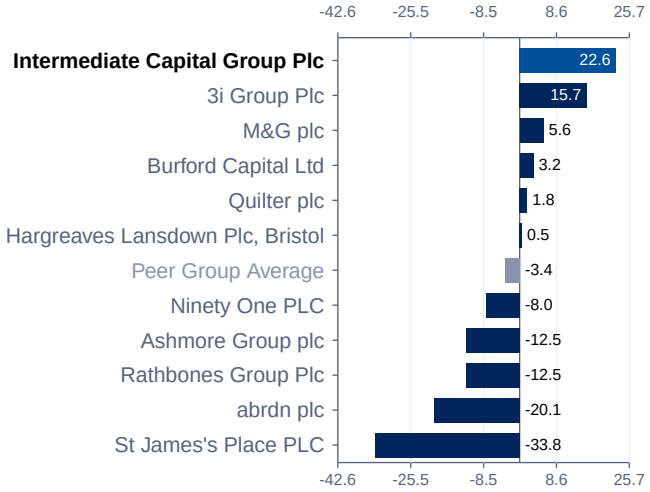
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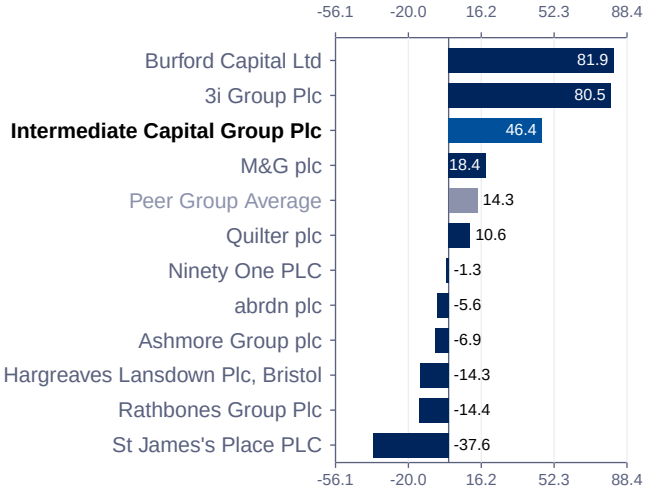
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ICB Subsector Peer Comparisons

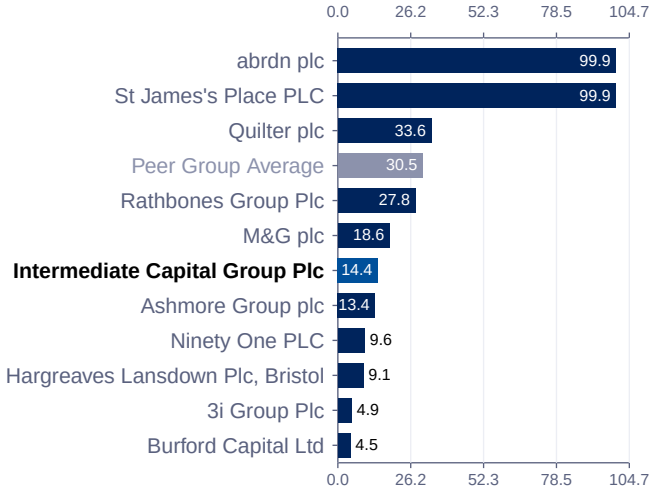
Price Change Year to Date %



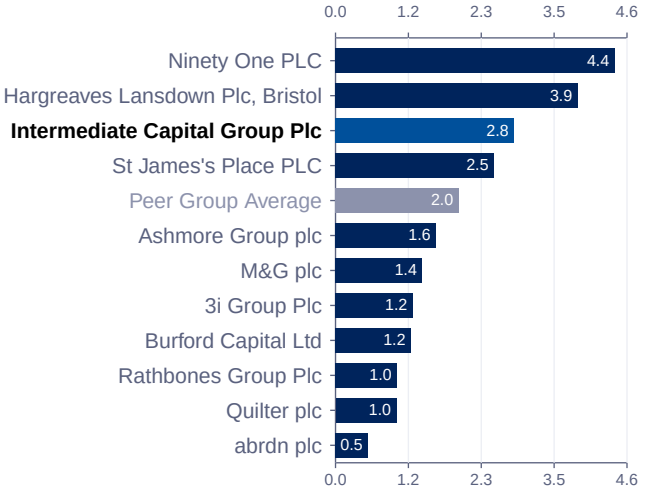
Price Change Last Calendar Year %



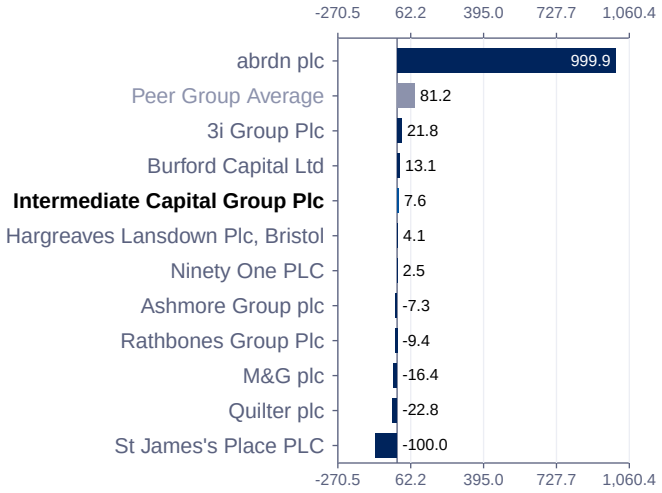
Price / EPS TTM



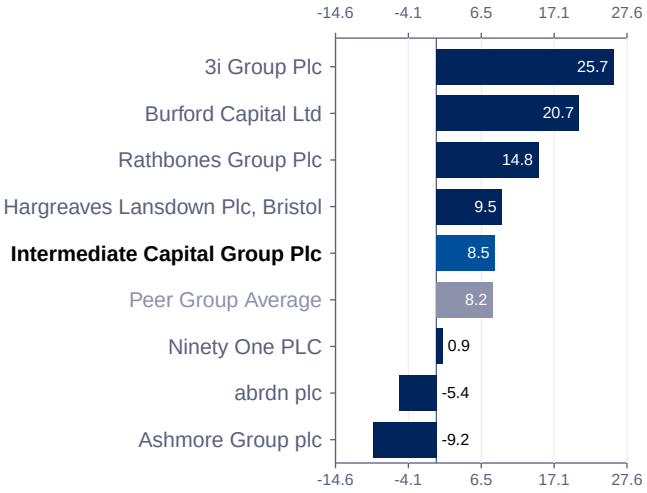
Price / Book Value



EPS 5-Year Growth Rate %



Revenue 5-Year Growth Rate %



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Abbreviations:

CAGR - Cumulative annual growth rate.
EBIT - Earnings before interest and taxes.
EBITDA - Earnings before interest, taxes, depreciation & amortization.
LFY - Last fiscal year
M - Million
LON - London Stock Exchange

Definitions:

Market Value - Weekly Price times latest Shares Outstanding times any applicable ADR factor.
Revenue - Sum of the last four quarters of Revenues.
Revenue Per Share - Sum of the last four quarters of Total Revenue divided by Weighted Average Shares Outstanding.
Operating EPS LFY - EPS excluding non-recurring, non-operating items, fiscal year aligned TTM value.
60-Day Average Volume (000) - The average of the last 60 daily volume values in thousands of shares.
Price 52-Week High - The high closing price from the last 52 weeks of daily closing prices.
Price 52-Week Low - The low closing price from the last 52 weeks of daily closing prices.
Price / 52-Week High - Latest price divided by the high price from the past 52 weeks of daily closing prices.
Price / 52-Week Low - Latest price divided by the low price from the past 52 weeks of daily closing prices.
50-Day Average Price - Mean of last 50 daily closing prices.
200-Day Average Price - Mean of last 200 daily closing prices.
Price / 50-Day Average Price - Latest closing price divided by mean of last 50 daily closing prices, as a percentage.
Price / 200-Day Average Price - Latest closing price divided by mean of last 200 daily closing prices, as a percentage.
Relative Strength Index - Relative Strength Index or RSI measures the magnitude of gains over a given time period against the magnitude of losses over that period. The equation is RSI = 100 - 100 / (1 + RS) where RS = (total gains / n) / (total losses / n) and n = number of RSI periods. In this item, 14 days is used and one year of daily prices are considered. A value of 30 or below may imply oversold and 70 or above may imply overbought.
Price Volatility - The standard deviation of the last 20 days of daily closing prices.
Sharpe Ratio - The 5 year average of the excess monthly return over the risk - free rate(1 - month T - bill) over the 5 year standard deviation of the same series.
Sortino Ratio - The same calculation as the Sharpe Ratio but with positive excess returns set to zero for the standard deviation denominator, so only negative volatility weighs in.
Dividends Per Share TTM - Sum of the last four quarters of Dividends Per Share.
Payout Ratio - Dividends Per Share TTM divided by Operating EPS TTM.
Dividend Yield TTM % - Sum of the last four quarter of Dividends Per Share divided by Weekly Price.
EBITDA - Sum of the last four quarters of EBITDA (Operating Income + Depreciation & Amortization).
Free Cash Flow - Sum of the last four quarters Net Cash from Operations minus Capital Expenditures (Purchase of Property, Plant & Equipment), from the Cash Flow Statement.
Book Value Per Share - Total Common Equity last quarter divided by Shares Outstanding last quarter.
Gross Margin % - Sum of the last four quarters Gross Profit divided by the sum of the last four quarters Revenues.
EBITDA Margin % - Sum of the last four quarters EBITDA divided by the sum of the last four quarters Revenues.
Pre-Tax Margin % - Sum of the last four quarters of Earnings Before Taxes divided by sum of the last four quarters Revenues.
Net Profit Margin % - Sum of the last four quarters of Operating EPS divided by sum of the last four quarters Revenues Per Share.
Return on Equity % - Sum of the last four quarters of Operating EPS divided by the average of the last four quarters Book Value.
Return on Capital % - Sum of the last four quarters of Operating EPS divided by the average of the last four quarters Total Capital Per Share.
Return on Assets % - Sum of the last four quarters of Operating EPS divided by the average of the last four quarters Total Assets Per Share.
Price / EPS TTM - Weekly Price divided by the sum of the last four quarters of Operating EPS (capped at 99.9).
Price / Sales - Weekly Price divided by Revenues Per Share TTM.
Price / Book Value - Weekly Price divided by Book Value Per Share last quarter. Book Value Per Share is Total Common Equity last quarter divided by Shares Outstanding last quarter (capped at 49.9).
Free Cash Flow Yield % - Free Cash Flow Per Share TTM divided by Weekly Price.
Enterprise Value - Market Value plus Total Debt last year plus Preferred Equity last year minus Cash & Cash Equivalents last year.
Enterprise Value / Sales - Enterprise Value divided by the sum of the last four quarters of Revenue.
Enterprise Value / EBITDA - Enterprise Value divided by EBITDA TTM.
Enterprise Value / EBIT - Enterprise Value divided by trailing four quarters of Operating Income.
Enterprise Value / Free Cash Flow- Enterprise Value divided by the sum of the last four quarters of Free Cash Flow.
Russell 1000 Index - The largest 1,000 stocks by market cap, the index comprehensively covers the US large cap universe.
EPS 5-Year Growth Rate % is capped at 999.9%.
Revenue 5-Year Growth Rate % is capped at 999.9%.

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