

Melrose Industries PLC (MRO:LN)



London
Stock Exchange

Industrials/Aerospace

Price: 5.10

Report Date: May 22, 2026

Business Description and Key Statistics

Melrose Industries PLC is a United Kingdom-based pure-play aerospace company. The Company provides advanced aerospace components and systems to all major original equipment manufacturer (OEMs), across both civil and defense markets. The Company operates through two divisions: Engines and Structures. Engines segment is a global tier one supplier to the aerospace engines market, including structural engineered components; parts repair; commercial and aftermarket contracts. Structures segment is a multi-technology global tier one supplier of both civil and defense air frames, including lightweight composite and metallic structures: electrical distribution systems and components. Its business includes GKN Aerospace, is a tier one supplier of airframe and engine structures, landing gear, electrical interconnection systems, transparencies, and aftermarket services.

Website: <https://www.melroseplc.net>

ICB Industry: Industrials

ICB Subsector: Aerospace

Address: 1st Floor, Stratton House, 5 Stratton Street
LONDON W1J 8LA
GBR

Employees: 13,844

	Current	YTY % Chg
Revenue LFY (M)	3,589	3.5
EPS Diluted LFY	0.29	624.1
Market Value (M)	6,411	
Shares Outstanding LFY (000)	1,258,019	
Book Value Per Share	2.25	
EBITDA Margin %	22.20	
Net Margin %	10.9	
Long-Term Debt / Capital %	39.1	
Dividends and Yield TTM	0.07 - 1.41%	
Payout Ratio TTM %	21.0	
60-Day Average Volume (000)	5,051	
52-Week High & Low	6.82 - 4.51	
Price / 52-Week High & Low	0.75 - 1.13	

Price, Moving Averages & Volume



Melrose Industries PLC is currently trading at 5.10 which is 0.4% above its 50 day moving average price of 5.08 and 12.4% below its 200 day moving average price of 5.82.

MRO:LN is currently 25.2% below its 52-week high price of 6.82 and is 13.0% above its 52-week low price of 4.51. Over the past 52-weeks, MRO:LN is up 12.9% while on a calendar year-to-date basis it is down 13.4%.

The Relative Strength Index (RSI) indicator for MRO:LN is currently 52.52. 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	Technical Indicators	
1-Day %	2.64	2.34	50-Day Average Price	5.08
1-Week %	7.24	4.60	Price / 50-Day Average	1.00
4-Week %	0.00	-0.26	200-Day Average Price	5.82
52-Week %	12.89	-6.21	Price / 200-Day Average	0.88
Quarter-to-Date %	1.35	-2.14	RSI - Relative Strength Index	52.52
Year-to-Date %	-13.39	-18.52	Risk Metrics	
Last Month %	-4.24	-6.63	Price Volatility	0.13
Last Quarter %	-14.55	-16.13	Sharpe Ratio	0.08
Last Calendar Year %	6.25	-13.67	Sortino Ratio	0.12

5-Year Price Performance vs. FTSE 350

Melrose Industries PLC
FTSE 350 Index

Current: 1.42 CAGR: 7.4%
Current: 1.40 CAGR: 7.0%



Over the past five years, Melrose Industries PLC's stock price is up 42.3% which is 2.2% above the FTSE 350 Index performance of 40.1% over the same period. Melrose Industries PLC's cumulative annualized growth rate (CAGR) over the five year period has been 7.4% while that of the FTSE 350 Index has been 7.0%.

Over the past year, Melrose Industries PLC's stock price performance of 12.9% has underperformed that of the FTSE 350 Index by 6.2%. On a year-to-date basis, Melrose Industries PLC's stock price performance of -13.4% has underperformed the FTSE 350 Index by 18.5%.

Over the past week, Melrose Industries PLC's stock price performance of 7.2% has outperformed that of the FTSE 350 Index by 4.6%.

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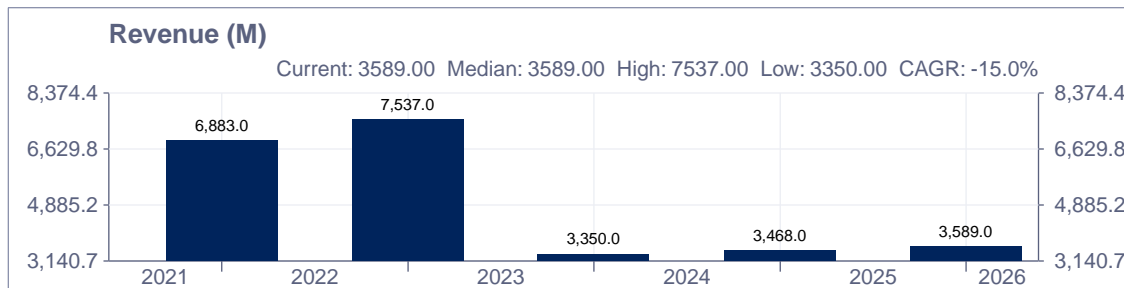
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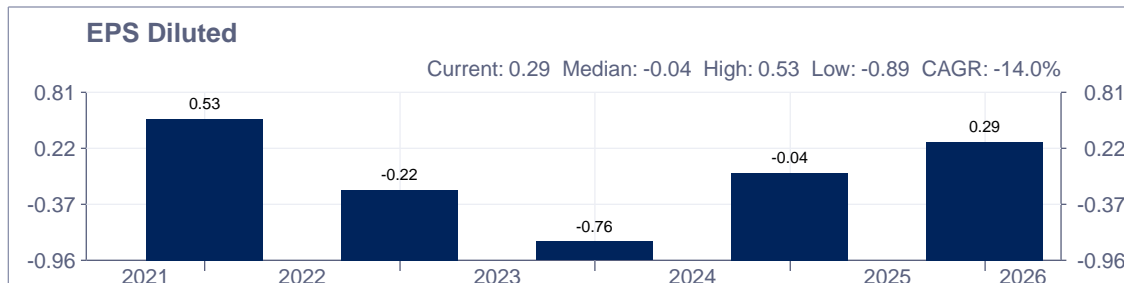
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Growth and Profitability Metrics

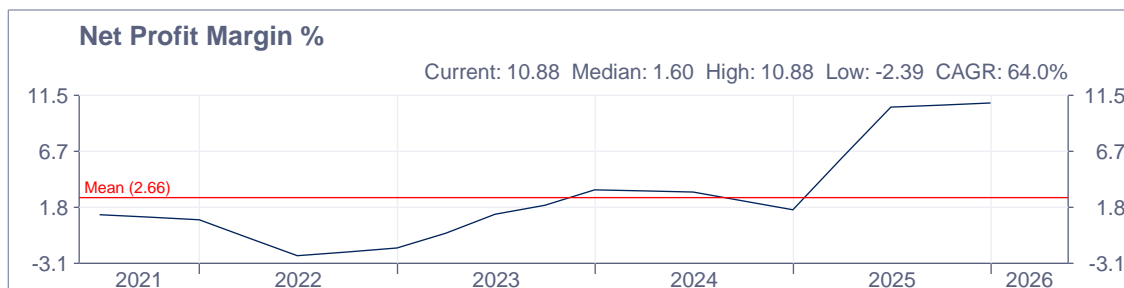
Historical Growth	3-Year	5-Year	10-Year	Profitability	Current	5-Year Average	10-Year Average
Revenues %	-21.9	-16.4	30.0	Gross Margin %	26.6	19.0	21.1
Revenues Per Share %	-18.6	-14.2	8.4	EBITDA Margin %	22.2	6.4	2.8
EBITDA %	53.5	999.9	56.8	Pre-Tax Margin %	13.0	-0.9	-2.8
EPS Diluted %	999.9	999.9	999.9	Net Margin %	10.9	2.7	2.8
Free Cash Flow %	999.9	-20.6	3.7	Return on Equity %	13.6	3.0	3.3
Cash from Operations %	1.6	-22.5	21.2	Return on Capital %	8.6	2.0	2.2
Book Value %	-24.8	-14.3	-15.6	Return on Assets %	5.3	1.2	1.4



Melrose Industries PLC's cumulative annualized revenue growth rate over the charted period is -15.0%. This compares to cumulative annualized growth of -21.9% over the past 3 years.



Melrose Industries PLC's cumulative annualized EPS growth rate over the charted period is -14.0%. This compares to cumulative annualized growth of 999.9% over the past 3 years.



Melrose Industries PLC's net profit margin of 10.9% is 8.2% above the period's mean net margin of 2.7%. During the charted period, the observed net profit margin high and low were 10.9% and -2.4% respectively.



Melrose Industries PLC's return on equity of 13.6% is 10.6% above the period's mean return on equity of 3.0%. During the charted period, the observed ROE high and low were 13.6% and -2.1% respectively.

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Valuation Metrics

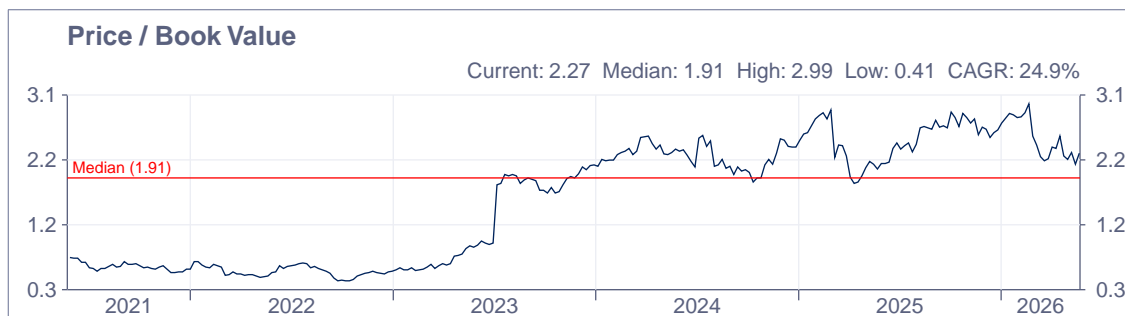
	Current	5-Year Median	10-Year Median		Current	5-Year Median	10-Year Median
Price / EPS TTM	16.7	76.2	59.7	Earnings Yield %	5.98	1.31	1.67
Price / Sales	1.8	1.6	1.0	Free Cash Flow Yield %	0.91	0.00	0.00
Price / Operating Cash Flow	11.2	17.7	18.6	Dividend Yield %	1.41	1.04	1.15
Price / Book Value	2.3	1.9	1.0	Enterprise Value / EBITDA	10.1	33.0	50.0



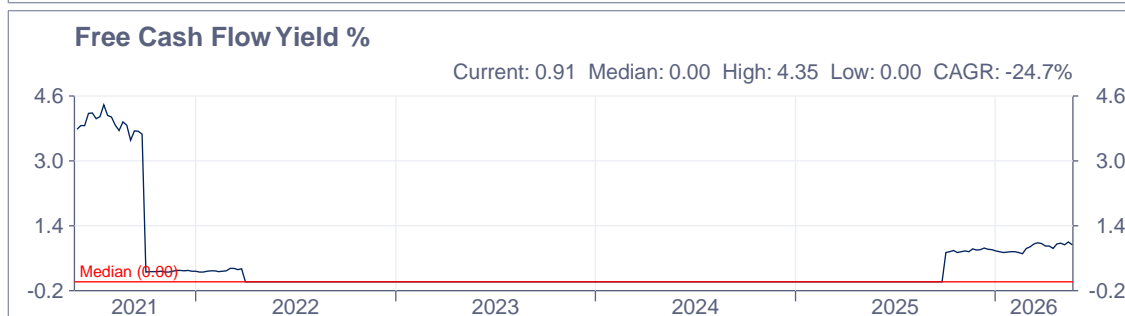
Melrose Industries PLC is trading at 16.71 times its EPS generated during the latest fiscal year. This multiple is below the historically observed median of 76.16, while high and low observations have been 99.90 and 15.58.



Melrose Industries PLC is trading at a Price to Sales ratio of 1.82 based on sales generated during the latest fiscal year. This ratio is above the historically observed median ratio of 1.56, while high and low observations have been 2.71 and 0.44.



Melrose Industries PLC is trading at a Price to Book ratio of 2.27 based on book value at the latest fiscal year end. This ratio is above the historically observed median of 1.91, while high and low observations have been 2.99 and 0.41.



Melrose Industries PLC has a Free Cash Flow Yield of 0.91% based on free cash flow generated during the latest fiscal year. This value is above the historically observed median yield of 0.00%, while high and low observations have been 4.35 and 0.00.

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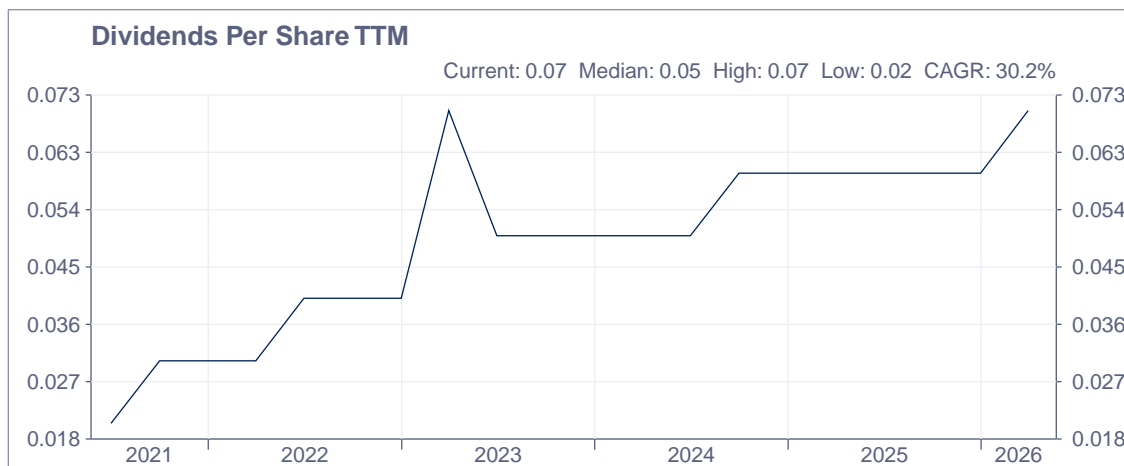
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Dividends Data

Dividends Per Share TTM		0.07	Payout Ratio TTM %		20.99%	Dividend Yield TTM %		1.41%
Rate	Ex Date	Record Date	Payment Date	Currency	Note			
0.048	19-03-2026	20-03-2026	05-05-2026	GBP				
0.024	14-08-2025	15-08-2025	15-09-2025	GBP				
0.040	27-03-2025	28-03-2025	09-05-2025	GBP				
0.020	08-08-2024	09-08-2024	16-09-2024	GBP				
0.035	28-03-2024	02-04-2024	08-05-2024	GBP				
0.015	14-09-2023	15-09-2023	20-10-2023	GBP				
0.031	09-03-2023	10-03-2023	11-04-2023	GBP				
0.017	15-09-2022	16-09-2022	20-10-2022	GBP				
0.021	07-04-2022	08-04-2022	20-05-2022	GBP				
0.016	09-09-2021	10-09-2021	15-10-2021	GBP				
0.016	01-04-2021	06-04-2021	19-05-2021	GBP				

Dividend Growth and Yield



Melrose Industries PLC's trailing 12-month dividend per share is 0.07 and its dividend has grown at a cumulative annualized rate of 30.2% over the charted period. This compares to dividend growth of 20.00% over the past year and cumulative annualized growth of 1.10% over the past 3 years.



Melrose Industries PLC's current dividend yield is 1.41% based on trailing 12 month dividends. The current yield is above the historically observed median of 1.04% and, over the charted time period, the observed high yield has been 2.07% and the observed low yield has been 0.00%.

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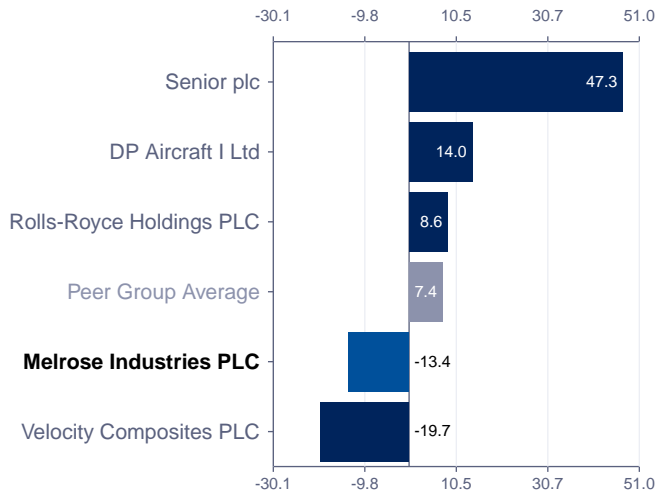
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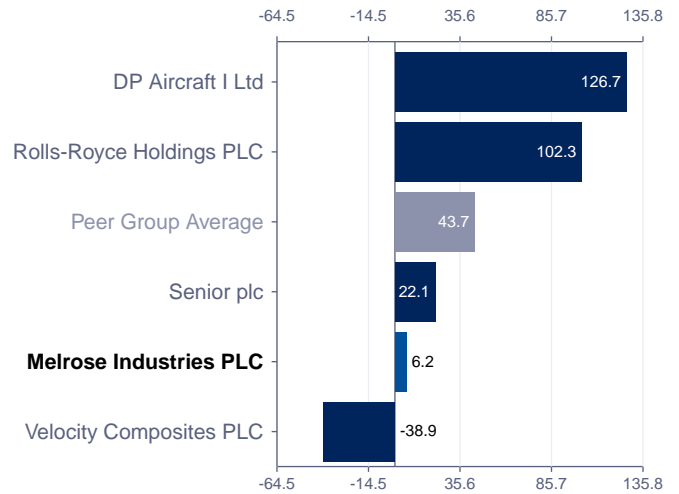
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ICB Subsector Peer Comparisons

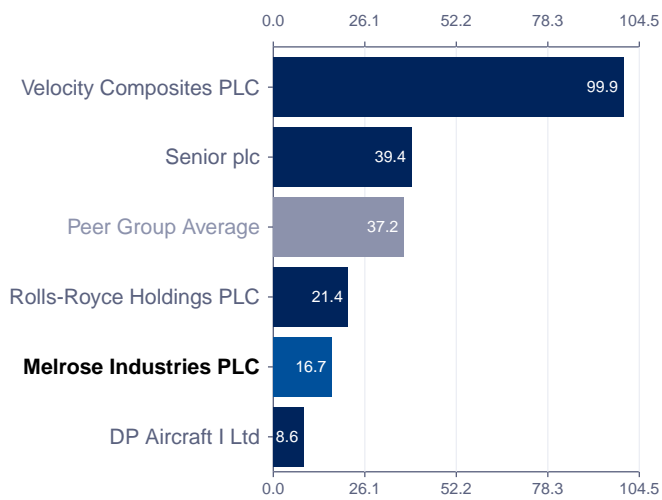
Price Change Year to Date %



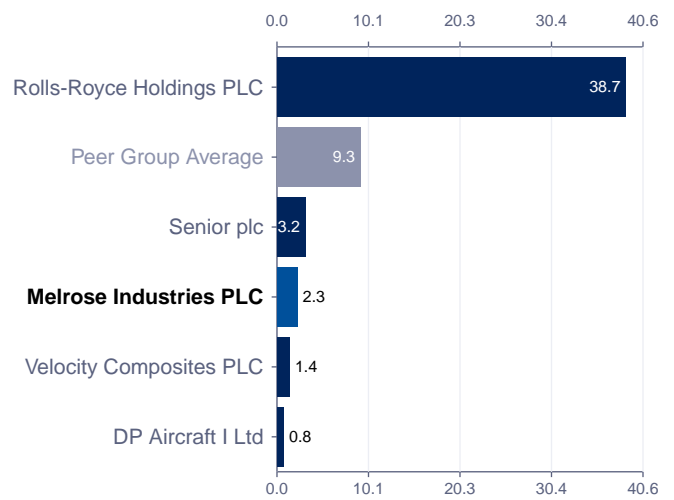
Price Change Last Calendar Year %



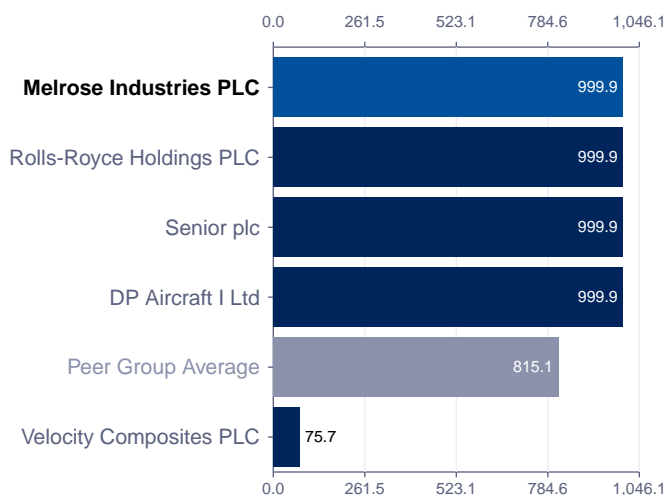
Price / EPS TTM



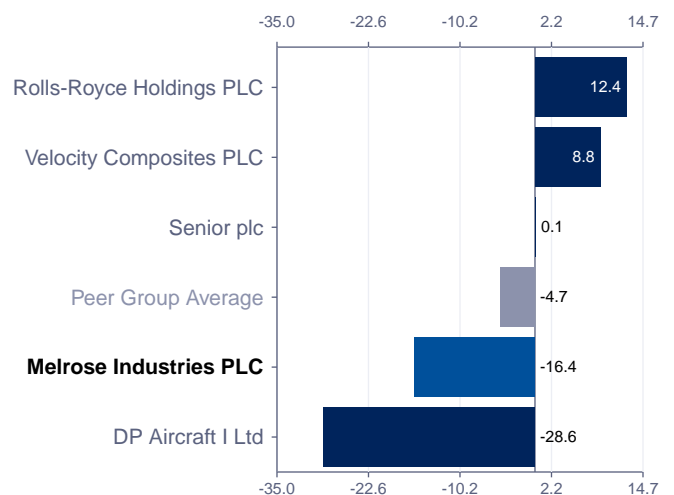
Price / Book Value



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.

Normalized 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 $RS = (\text{total gains} / n) / (\text{total losses} / n)$ and $n = \text{number of RSI periods}$. 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 Normalized 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 Normalized EPS divided by sum of the last four quarters Revenues Per Share.

Return on Equity % - Sum of the last four quarters of Normalized EPS divided by the average of the last four quarters Book Value.

Return on Capital % - Sum of the last four quarters of Normalized EPS divided by the average of the last four quarters Total Capital Per Share.

Return on Assets % - Sum of the last four quarters of Normalized 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 Normalized 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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