

# MS International PLC (MSI:LN)



Basic Materials/Iron and Steel

Price: 130.00 GBX

Report Date: August 3, 2020

## Business Description and Key Statistics

MS International is engaged in the design and manufacture of engineering products and the provision of related services. Co. operates through the following four divisions: Defense, Forgings, Petrol Station Superstructures and Petrol Station Branding. The Defense division is engaged in the design, manufacture and service of defense equipment. The Forgings division is engaged in the manufacture of forgings. The Petrol Station Superstructures division is engaged in the design, manufacture, construction, branding, maintenance and restyling of petrol station superstructures. The Petrol Station Branding division is engaged in the design and installation of the petrol stations.

### Website:

ICB Industry: Basic Materials

ICB Subsector: Iron and Steel

Address: Balby Carr Bank  
Doncaster  
GBR

Employees: 447

	Current	YTY % Chg
Revenue LFY (M)	78	14.1
Operating EPS LFY	0.23	13.7
Market Value (M)	22	
Shares Outstanding (000)	16,505	
Book Value Per Share	2.17	
EBITDA Margin %	8.60	
Net Margin %	5.0	
Long-Term Debt / Capital %	0.0	
Dividends and Yield TTM	0.02 - 1.35%	
Payout Ratio TTM %	35.4	
60-Day Average Volume (000)	2	
52-Week High & Low	211.00 - 108.00	
Price / 52-Week High & Low	0.62 - 1.20	

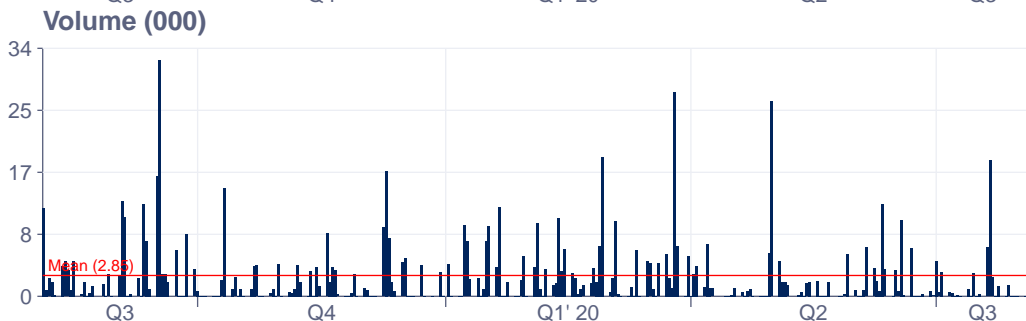
## Price, Moving Averages & Volume



MS International PLC is currently trading at 130.00 which is 0.6% above its 50 day moving average price of 129.24 and 15.2% below its 200 day moving average price of 153.24.

MSI:LN is currently 38.4% below its 52-week high price of 211.00 and is 20.4% above its 52-week low price of 108.00. Over the past 52-weeks, MSI:LN is down 37.5% while on a calendar year-to-date basis it is down 28.2%.

The Relative Strength Index (RSI) indicator for MSI:LN is currently 51.86. An RSI value of 70 and above is considered overbought and 30 and below oversold.



■ Price ■ Price (50-Day Simple Moving Average) ■ Price (200-Day Simple Moving Average)

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## Price Performance, Technical Indicators & Risk Metrics

Price Performance	% Change	Difference vs FTSE 350	Technical Indicators	
1-Day %	0.00	-2.13	50-Day Average Price	129.24
1-Week %	0.00	0.98	Price / 50-Day Average	1.01
4-Week %	-2.26	1.47	200-Day Average Price	153.24
52-Week %	-37.50	-20.18	Price / 200-Day Average	0.85
Quarter-to-Date %	0.00	1.81	RSI - Relative Strength Index	51.86
Year-to-Date %	-28.18	-7.89	<b>Risk Metrics</b>	
Last Month %	0.00	3.86	Price Volatility	3.50
Last Quarter %	2.36	-7.16	Sharpe Ratio	-0.05
Last Calendar Year %	-13.40	-27.57	Sortino Ratio	-0.07

## 5-Year Price Performance vs. FTSE 350

**MS International PLC**  
**FTSE 350 Index**

Current: 0.70 CAGR: -7.0%  
Current: 0.83 CAGR: -3.7%



Over the past five years, MS International PLC's stock price is down 30.3% which is 13.0% below the FTSE 350 Index performance of -17.3% over the same period. MS International PLC's cumulative annualized growth rate (CAGR) over the five year period has been -7.0% while that of the FTSE 350 Index has been -3.7%.

Over the past year, MS International PLC's stock price performance of -37.5% has underperformed that of the FTSE 350 Index by 20.2%. On a year-to-date basis, MS International PLC's stock price performance of -28.2% has underperformed the FTSE 350 Index by 7.9%.

Over the past week, MS International PLC's stock price performance of 0.0% has outperformed that of the FTSE 350 Index by 1.0%.

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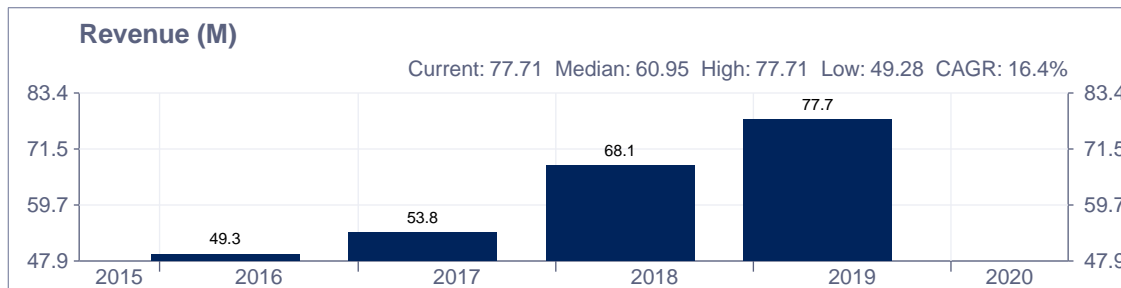
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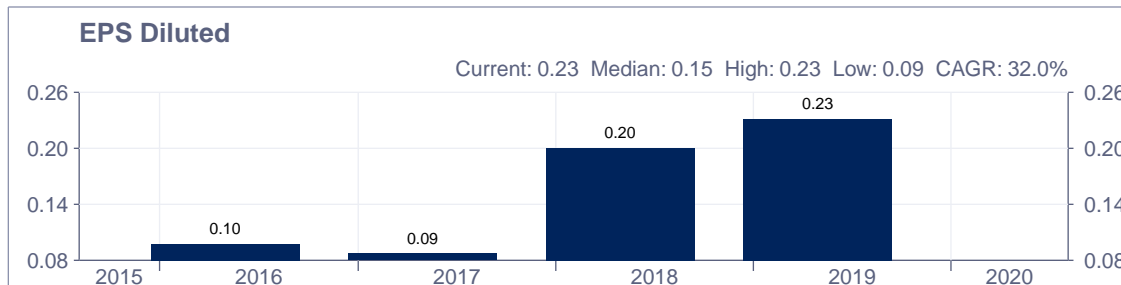
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## Growth and Profitability Metrics

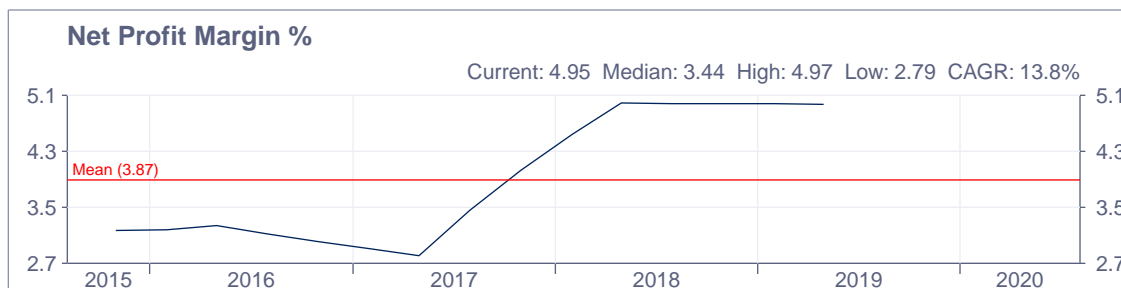
Historical Growth	3-Year	5-Year	10-Year	Profitability	Current	5-Year Average	10-Year Average
Revenues %	16.4	10.5	10.4	Gross Margin %	27.8	26.9	
Revenues Per Share %	16.4	12.5	14.5	EBITDA Margin %	8.6	7.6	
EBITDA %	23.8	7.1	23.3	Pre-Tax Margin %	6.2	4.4	
Operating EPS %	34.4	9.8		Net Margin %	5.0	3.9	
Free Cash Flow %	999.9	12.4		Return on Equity %	11.3	8.2	
Cash from Operations %	74.0	8.9		Return on Capital %	11.3	8.0	
Book Value %	12.0	6.2		Return on Assets %	5.5	3.9	



MS International PLC's cumulative annualized revenue growth rate over the charted period is 16.4%. This compares to revenue growth of 14.1% last fiscal year and cumulative annualized growth of 16.4% over the past 3 years.



MS International PLC's cumulative annualized EPS growth rate over the charted period is 32.0%. This compares to EPS growth of 13.7% last fiscal year and cumulative annualized growth of 34.4% over the past 3 years.



MS International PLC's net profit margin last fiscal year of 5.0% is 1.1% above the period's mean net margin of 3.9%. During the charted period, the observed net profit margin high and low were 5.0% and 2.8% respectively.



MS International PLC's return on equity of 11.3% is 3.1% above the period's mean return on equity of 8.2%. During the charted period, the observed ROE high and low were 11.3% and 5.7% respectively.

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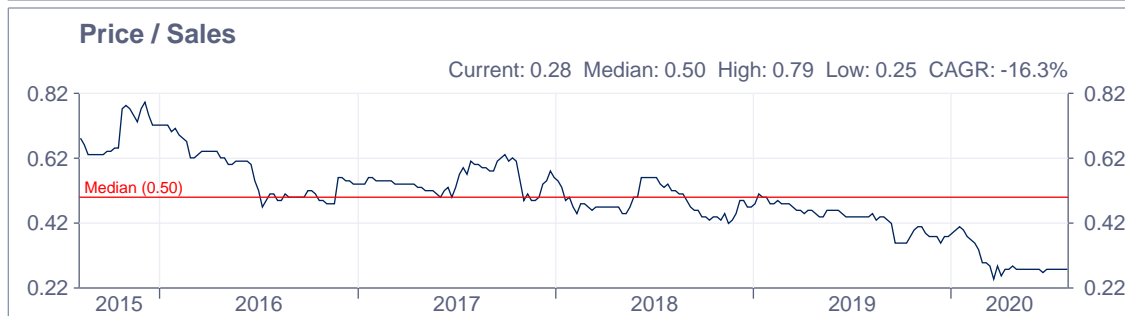
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## Valuation Metrics

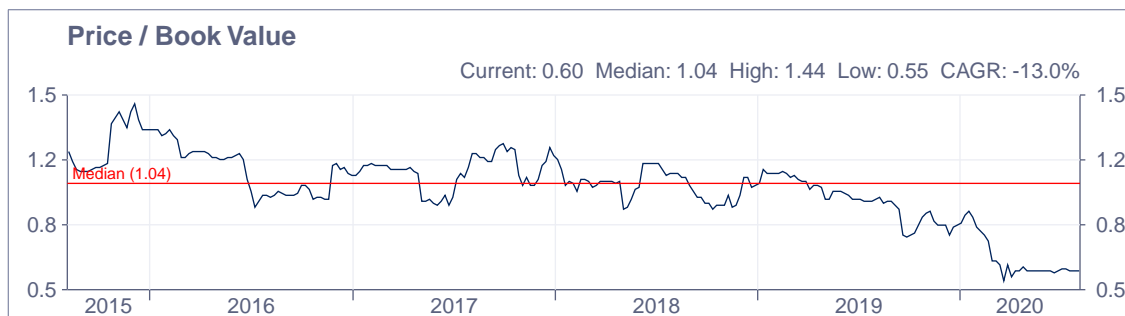
	Current	5-Year Median	10-Year Median		Current	5-Year Median	10-Year Median
Price / EPS TTM	5.6	11.3	10.6	Earnings Yield %	13.88	6.30	
Price / Sales	0.3	0.5	0.6	Free Cash Flow Yield %	38.14	9.41	9.27
Price / Operating Cash Flow	3.9	7.2	6.9	Dividend Yield %	1.35	4.39	4.12
Price / Book Value	0.6	1.0	1.1	Enterprise Value / EBITDA	0.1	3.4	3.8



MS International PLC is trading at 5.58 times its EPS generated during the latest fiscal year. This multiple is below the historically observed median of 11.27, while high and low observations have been 25.17 and 5.15.



MS International PLC is trading at a Price to Sales ratio of 0.28 based on sales generated during the latest fiscal year. This ratio is below the historically observed median ratio of 0.50, while high and low observations have been 0.79 and 0.25.



MS International PLC is trading at a Price to Book ratio of 0.60 based on book value at the latest fiscal year end. This ratio is below the historically observed median of 1.04, while high and low observations have been 1.44 and 0.55.



MS International PLC has a Free Cash Flow Yield of 38.14% based on free cash flow generated during the latest fiscal year. This value is above the historically observed median yield of 9.42%, while high and low observations have been 41.32 and 0.00.

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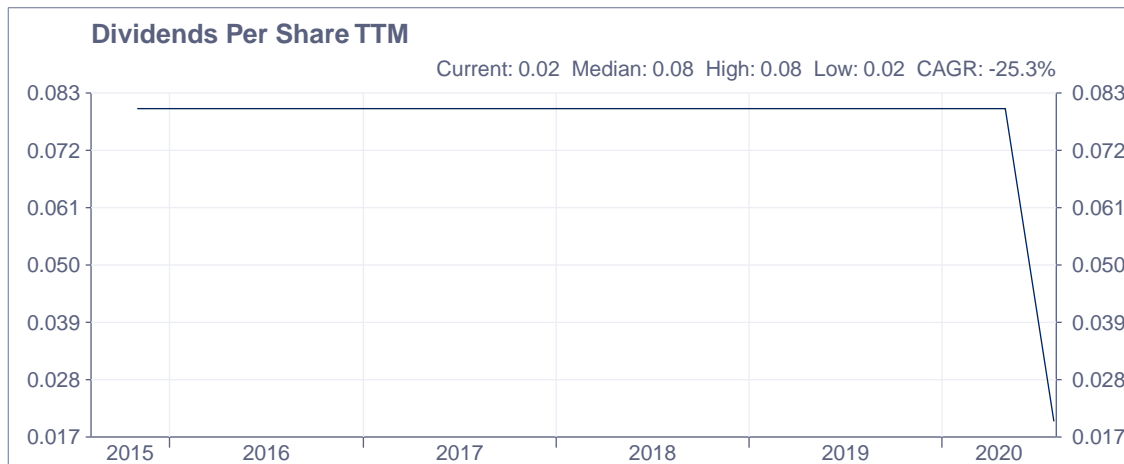
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## Dividends Data

Dividends Per Share TTM		0.02	Payout Ratio TTM %		35.39%	Dividend Yield TTM %		1.35%
Rate	Ex Date	Record Date	Payment Date	Currency	Note			
0.018	19-12-2019	20-12-2019	10-01-2020	GBP	INTERIM GROSS			
0.065	20-06-2019	21-06-2019	25-07-2019	GBP	FINAL GROSS			
0.018	13-12-2018	14-12-2018	04-01-2019	GBP	INTERIM GROSS			
0.065	21-06-2018	22-06-2018	24-07-2018	GBP	FINAL GROSS			
0.018	07-12-2017	08-12-2017	29-12-2017	GBP	INTERIM GROSS			
0.065	22-06-2017	23-06-2017	24-07-2017	GBP	FINAL GROSS			
0.015	01-12-2016	02-12-2016	23-12-2016	GBP	INTERIM GROSS			
0.065	23-06-2016	24-06-2016	21-07-2016	GBP	FINAL GROSS			
0.015	10-12-2015	11-12-2015	04-01-2016	GBP	INTERIM NET			
0.065	25-06-2015	26-06-2015	24-07-2015	GBP	FINAL NET			
0.015	04-12-2014	05-12-2014	31-12-2014	GBP	INTERIM NET			

## Dividend Growth and Yield



MS International PLC's trailing 12-month dividend per share is 0.02 and its dividend has grown at a cumulative annualized rate of -25.3% over the charted period. This compares to dividend growth of -78.80% over the past year and cumulative annualized growth of -39.70% over the past 3 years.



MS International PLC's current dividend yield is 1.35% based on trailing 12 month dividends. The current yield is below the historically observed median of 4.39% and, over the charted time period, the observed high yield has been 6.88% and the observed low yield has been 1.35%.

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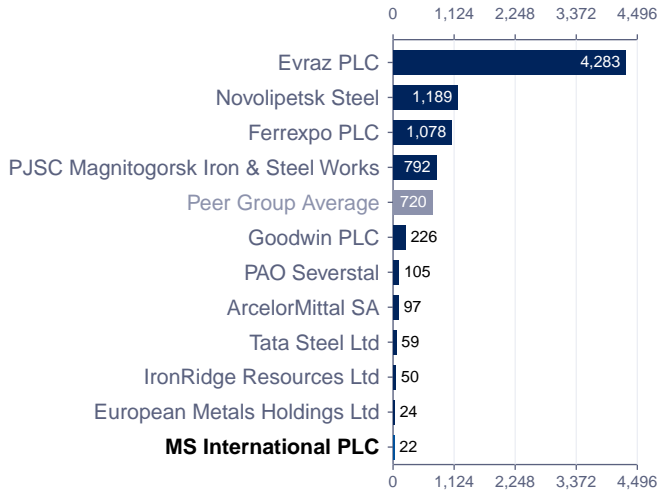
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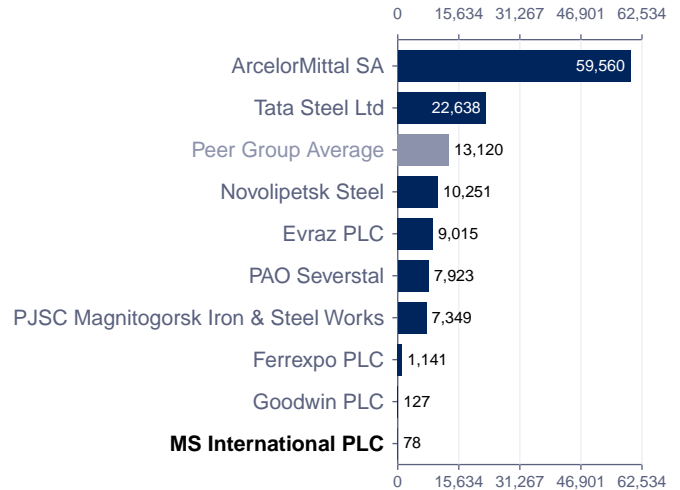
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## Subsector Peer Comparisons

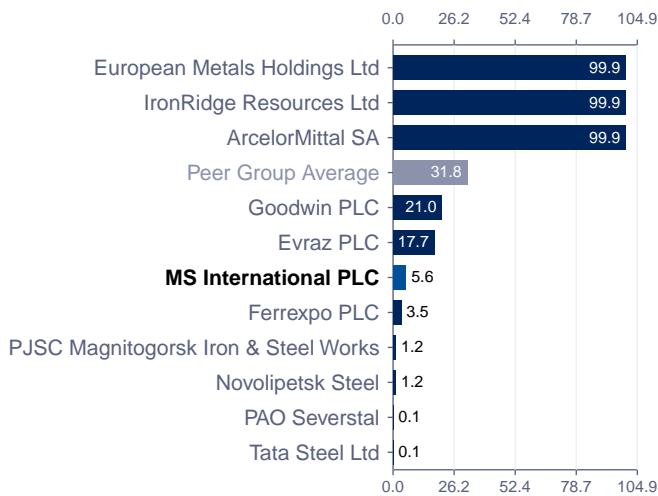
**Market Value (M)**



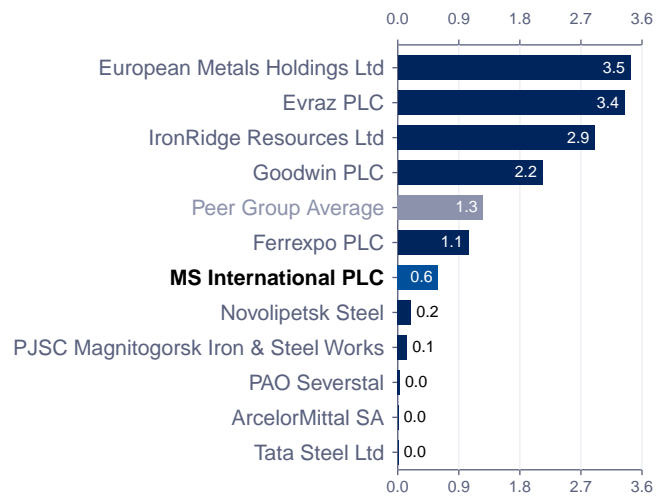
**Revenue LFY (M)**



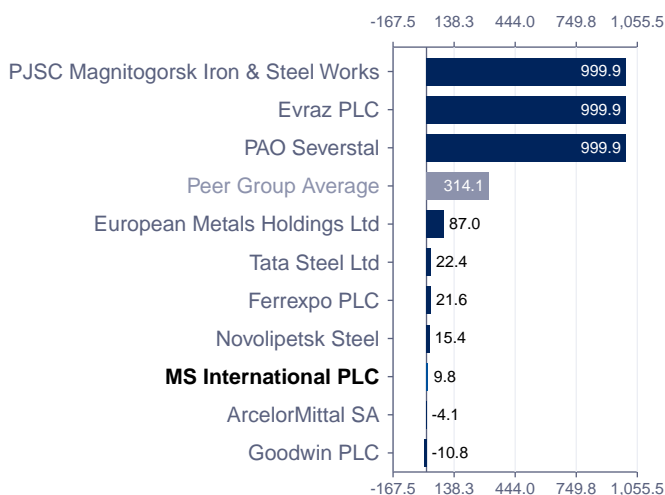
**Price / EPS TTM**



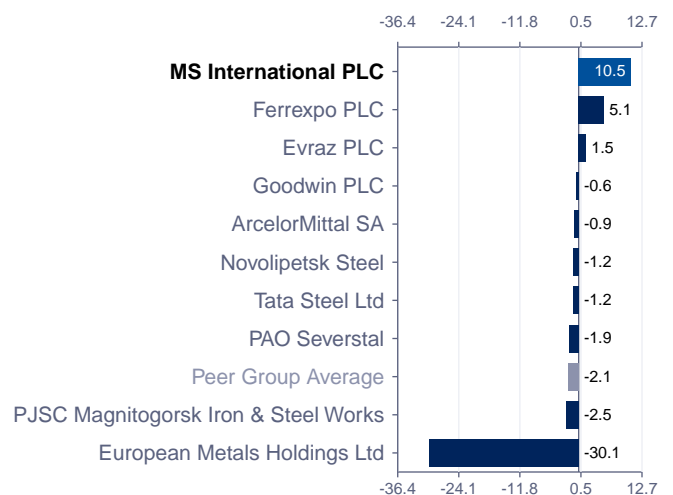
**Price / Book Value**



**EPS 5-Year Growth Rate %**



**Revenue 5-Year Growth Rate %**



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## Abbreviations:

<b>CAGR</b>	- Cumulative annual growth rate.
<b>EBIT</b>	- Earnings before interest and taxes.
<b>EBITDA</b>	- Earnings before interest, taxes, depreciation & amortization.
<b>LFY</b>	- Last fiscal year
<b>M</b>	- Million
<b>LON</b>	- 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  $RS = (\text{total gains} / n) / (\text{total losses} / n)$  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 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** - Total Common Equity last quarter divided by Shares Outstanding last quarter.

**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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