

Smurfit Kappa Group PLC (SKG:LN)



London
Stock Exchange

Industrials/Containers and Packaging

Price: 3,466.00

Report Date: April 23, 2024

Business Description and Key Statistics

Smurfit Kappa Group PLC is an Ireland-based provider of paper-based packaging. The Company is an integrated paper and paperboard manufacturer and converter whose operations are divided into Europe and the Americas. Its segments include Europe and the Americas. The Europe and the Americas segments are each integrated. They include a system of mills and plants that primarily produce a full line of containerboard that is converted into corrugated containers within each segment. In addition, the Europe segment also produces other types of paper, such as solid board, sack kraft paper, machine glazed (MG) and graphic paper, and other paper-based packaging, such as honeycomb, solid board packaging and folding cartons; and bag-in-box packaging. The Americas segment comprises forestry; other types of paper, such as boxboard and sack paper; and paper-based packaging, such as folding cartons, honeycomb and paper sacks. It serves sectors, including automotive, bakery, pet food and others.

Website: <https://www.smurfitkappa.com/>

ICB Industry: Industrials

ICB Subsector: Containers and Packaging

Address: Beech Hill, Clonskeagh
DUBLIN D04 N2R2
IRL

Employees: 47,000

	Current	YTY % Chg
Revenue LFY (M)	12,441	-8.9
EPS Diluted LFY	3.22	-16.8
Market Value (M)	9,024	
Shares Outstanding LFY (000)	260,354	
Book Value Per Share	23.57	
EBITDA Margin %	15.30	
Net Margin %	6.8	
Long-Term Debt / Capital %	39.0	
Dividends and Yield TTM	1.52 - 4.07%	
Payout Ratio TTM %	43.8	
60-Day Average Volume (000)	971	
52-Week High & Low	3,638.00 - 2,554.00	
Price / 52-Week High & Low	0.95 - 1.36	

Price, Moving Averages & Volume



Smurfit Kappa Group PLC is currently trading at 3,466.00 which is 0.8% above its 50 day moving average price of 3,438.00 and 13.2% above its 200 day moving average price of 3,062.91.

SKG:LN is currently 4.7% below its 52-week high price of 3,638.00 and is 35.7% above its 52-week low price of 2,554.00. Over the past 52-weeks, SKG:LN is up 18.7% while on a calendar year-to-date basis it is up 11.1%.

The Relative Strength Index (RSI) indicator for SKG:LN is currently 44.86. An RSI value of 70 and above is considered overbought and 30 and below oversold.

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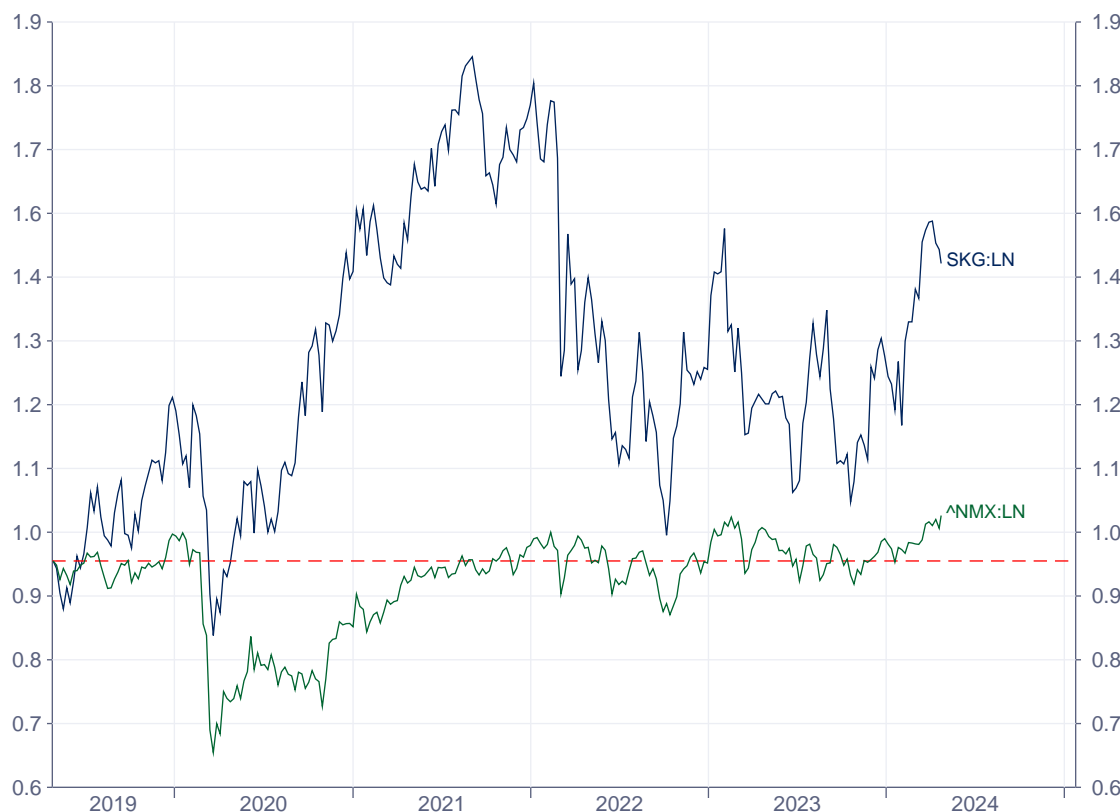
Price Performance, Technical Indicators & Risk Metrics

Price Performance	% Change	Difference vs FTSE 350	Technical Indicators	
1-Day %	-2.37	-2.74	50-Day Average Price	3438.00
1-Week %	1.11	-1.69	Price / 50-Day Average	1.01
4-Week %	-3.45	-4.74	200-Day Average Price	3062.91
52-Week %	18.70	16.84	Price / 200-Day Average	1.13
Quarter-to-Date %	-4.25	-5.19	RSI - Relative Strength Index	44.86
Year-to-Date %	11.09	7.56	Risk Metrics	
Last Month %	7.16	2.91	Price Volatility	69.24
Last Quarter %	16.03	13.46	Sharpe Ratio	0.09
Last Calendar Year %	1.60	-2.28	Sortino Ratio	0.17

5-Year Price Performance vs. FTSE 350

Smurfit Kappa Group PLC
FTSE 350 Index

Current: 1.47 CAGR: 8.0%
Current: 1.07 CAGR: 1.4%



Over the past five years, Smurfit Kappa Group PLC's stock price is up 47.1% which is 39.9% above the FTSE 350 Index performance of 7.2% over the same period. Smurfit Kappa Group PLC's cumulative annualized growth rate (CAGR) over the five year period has been 8.0% while that of the FTSE 350 Index has been 1.4%.

Over the past year, Smurfit Kappa Group PLC's stock price performance of 18.7% has outperformed that of the FTSE 350 Index by 16.8%. On a year-to-date basis, Smurfit Kappa Group PLC's stock price performance of 11.1% has outperformed the FTSE 350 Index by 7.6%.

Over the past week, Smurfit Kappa Group PLC's stock price performance of 1.1% has underperformed that of the FTSE 350 Index by 1.7%.

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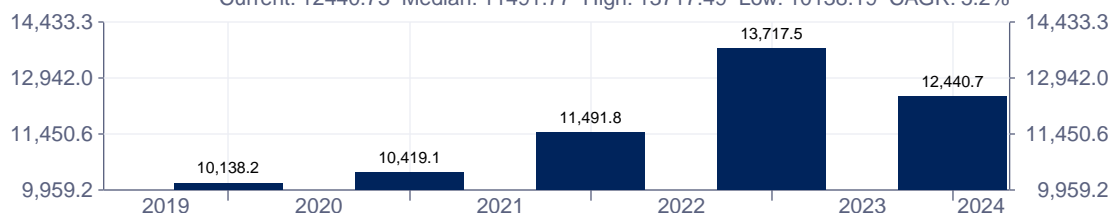
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Growth and Profitability Metrics

Historical Growth	3-Year	5-Year	10-Year	Profitability	Current	5-Year Average	10-Year Average
Revenues %	7.3	3.6	1.6	Gross Margin %	33.6	32.5	31.5
Revenues Per Share %	7.0	1.7	0.3	EBITDA Margin %	15.3	14.6	14.5
EBITDA %	9.9	4.5	3.3	Pre-Tax Margin %	9.4	7.9	6.6
EPS Diluted %	6.4	999.9	11.4	Net Margin %	6.8	5.6	4.4
Free Cash Flow %	-7.0	3.7	-1.9	Return on Equity %	14.3	13.7	12.7
Cash from Operations %	3.2	7.2	-0.5	Return on Capital %	7.7		
Book Value %	9.7	12.1	5.5	Return on Assets %	6.1	5.1	4.1

Revenue (M)

Current: 12440.73 Median: 11491.77 High: 13717.49 Low: 10138.19 CAGR: 5.2%



Smurfit Kappa Group PLC's cumulative annualized revenue growth rate over the charted period is 5.2%. This compares to cumulative annualized growth of 7.3% over the past 3 years.

EPS Diluted

Current: 3.22 Median: 2.97 High: 3.87 Low: 2.24 CAGR: 9.5%



Smurfit Kappa Group PLC's cumulative annualized EPS growth rate over the charted period is 9.5%. This compares to cumulative annualized growth of 6.4% over the past 3 years.

Net Profit Margin %

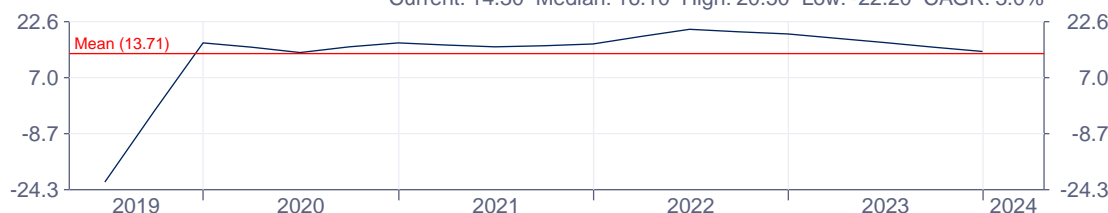
Current: 6.78 Median: 6.77 High: 8.00 Low: -6.76 CAGR: 1.5%



Smurfit Kappa Group PLC's net profit margin of 6.8% is 1.2% above the period's mean net margin of 5.6%. During the charted period, the observed net profit margin high and low were 8.0% and -6.8% respectively.

Return on Equity %

Current: 14.30 Median: 16.10 High: 20.50 Low: -22.20 CAGR: 3.0%



Smurfit Kappa Group PLC's return on equity of 14.3% is 0.6% above the period's mean return on equity of 13.7%. During the charted period, the observed ROE high and low were 20.5% and -22.2% respectively.

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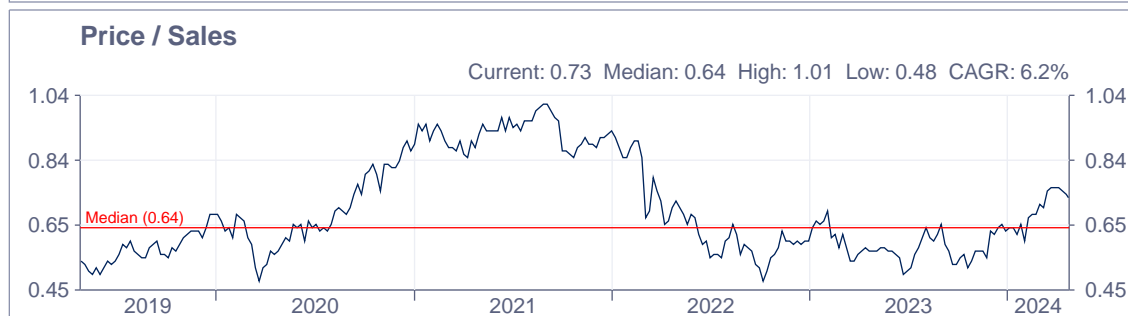
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Valuation Metrics

	Current	5-Year Median	10-Year Median		Current	5-Year Median	10-Year Median
Price / EPS TTM	10.8	12.3	12.0	Earnings Yield %	9.29	8.11	8.35
Price / Sales	0.7	0.6	0.6	Free Cash Flow Yield %	4.02	4.54	5.07
Price / Operating Cash Flow	7.6	7.8	6.9	Dividend Yield %	4.07	3.91	3.72
Price / Book Value	1.5	1.7	1.8	Enterprise Value / EBITDA	6.4	6.6	6.4



Smurfit Kappa Group PLC is trading at 10.77 times its EPS generated during the latest fiscal year. This multiple is below the historically observed median of 12.34, while high and low observations have been 99.90 and 6.25.



Smurfit Kappa Group PLC is trading at a Price to Sales ratio of 0.73 based on sales generated during the latest fiscal year. This ratio is above the historically observed median ratio of 0.64, while high and low observations have been 1.01 and 0.48.



Smurfit Kappa Group PLC is trading at a Price to Book ratio of 1.47 based on book value at the latest fiscal year end. This ratio is below the historically observed median of 1.74, while high and low observations have been 2.29 and 1.13.



Smurfit Kappa Group PLC has a Free Cash Flow Yield of 4.02% based on free cash flow generated during the latest fiscal year. This value is below the historically observed median yield of 4.54%, while high and low observations have been 6.74 and 1.58.

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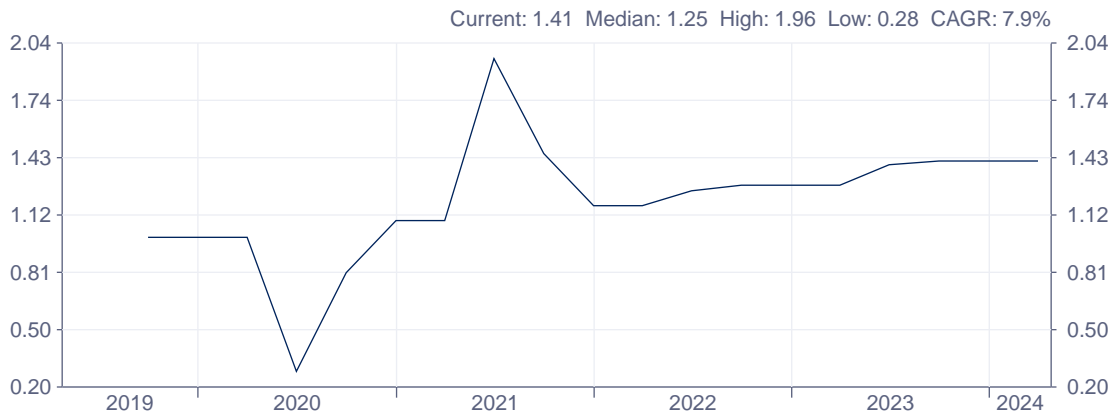
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Dividends Data

Dividends Per Share TTM		1.52	Payout Ratio TTM %		43.83%	Dividend Yield TTM %		4.07%
Rate	Ex Date	Record Date	Payment Date	Currency	Note			
1.184	11-04-2024	12-04-2024	10-05-2024	EUR				
0.335	28-09-2023	29-09-2023	27-10-2023	EUR				
1.076	13-04-2023	14-04-2023	12-05-2023	EUR				
0.316	29-09-2022	30-09-2022	28-10-2022	EUR				
0.961	07-04-2022	08-04-2022	06-05-2022	EUR				
0.293	23-09-2021	24-09-2021	22-10-2021	EUR				
0.874	08-04-2021	09-04-2021	07-05-2021	EUR				
0.279	19-11-2020	20-11-2020	11-12-2020	EUR				
0.809	13-08-2020	14-08-2020	11-09-2020	EUR				
0.279	26-09-2019	27-09-2019	25-10-2019	EUR				
0.722	11-04-2019	12-04-2019	10-05-2019	EUR				
0.254	27-09-2018	28-09-2018	26-10-2018	EUR				

Dividend Growth and Yield

Dividends Per Share TTM



Smurfit Kappa Group PLC's trailing 12-month dividend per share is 1.41 and its dividend has grown at a cumulative annualized rate of 7.9% over the charted period. This compares to dividend growth of 9.10% over the past year and cumulative annualized growth of -8.20% over the past 3 years.

Dividend Yield TTM %



Smurfit Kappa Group PLC's current dividend yield is 4.07% based on trailing 12 month dividends. The current yield is above the historically observed median of 3.92% and, over the charted time period, the observed high yield has been 5.48% and the observed low yield has been 0.92%.

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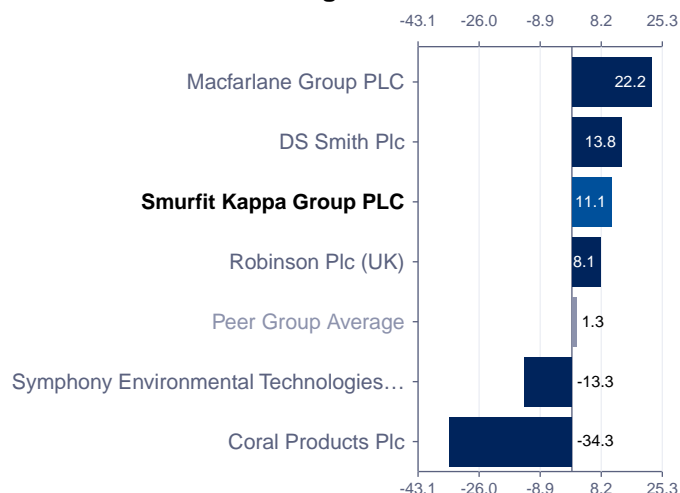
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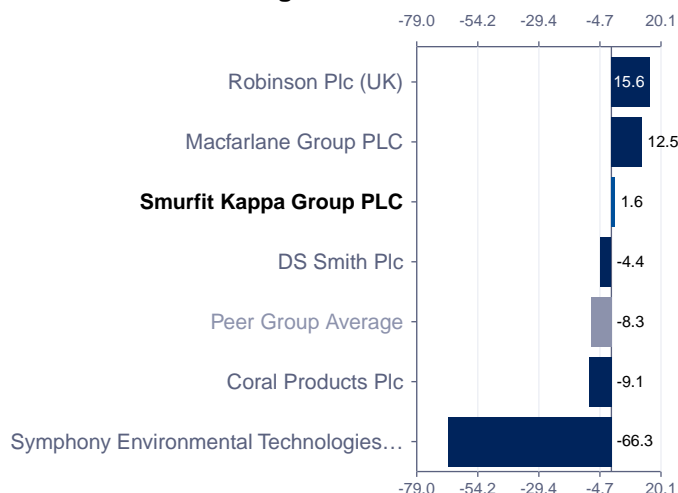
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ICB Subsector Peer Comparisons

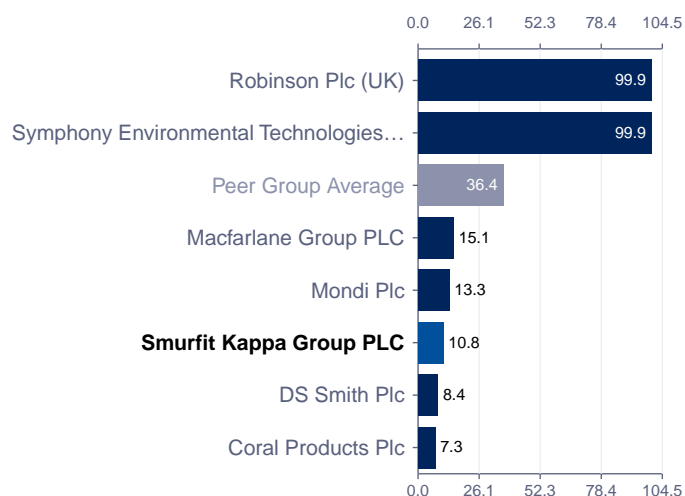
Price Change Year to Date %



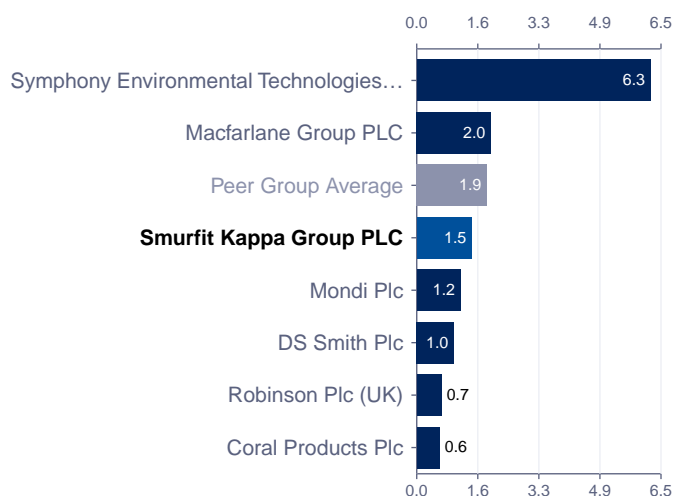
Price Change Last Calendar Year %



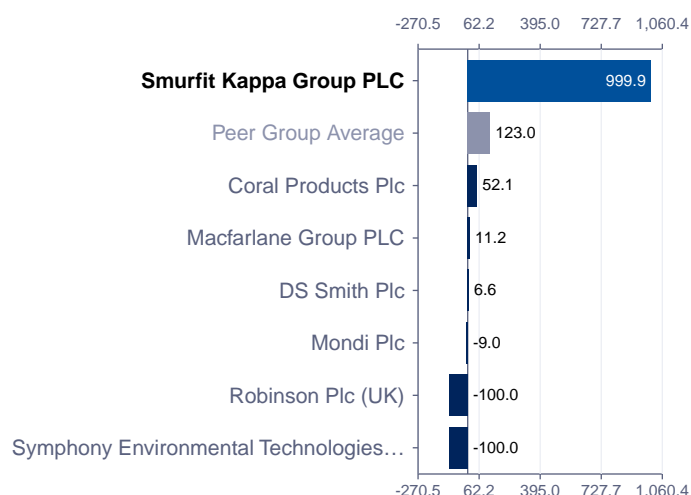
Price / EPS TTM



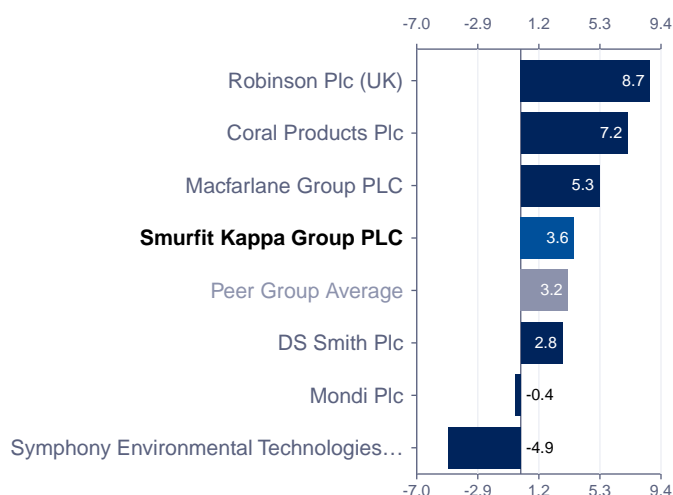
Price / Book Value



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.

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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