

SThree Plc (STEM:LN)



Industrials/Business Training and Employment Agencies

Price: 1.62

Report Date: April 27, 2026

Business Description and Key Statistics

SThree plc is a United Kingdom-based global specialist talent partner focused on roles in Science, Technology, Engineering and Mathematics, providing permanent and flexible contract talent. Its segments include DACH, Rest of Europe, Netherlands including Spain, United States, and Middle East & Asia. DACH segment includes Austria, Germany and Switzerland. Rest of Europe segment includes Belgium, France and the United Kingdom. Middle East & Asia segment includes Dubai and Japan. Its brands include Computer Futures, Progressive, Real, Huxley and others. Progressive Recruitment is involved in start-up and blue-chip multinational sectors, providing sought-after specialists in engineering, life sciences, information technology, global energy, construction and supply chains. Computer Futures is a specialist IT recruitment provider. Real Staffing is engaged in recruitment for the pharmaceuticals, medical devices and biotechnology sectors, with specialist services within the public sector.

Website: <https://www.sthree.com/en-gb/>

ICB Industry: Industrials

ICB Subsector: Business Training and Employment Agencies

Address: 75 King William Street
LONDON EC4N 7BE
GBR

Employees: 2,342

| | Current | YTY % Chg |
|---------------------------------------|--------------|-----------|
| Revenue LFY (M) | 1,302 | -12.8 |
| EPS Diluted LFY | 0.14 | -62.0 |
| Market Value (M) | 208 | |
| Shares Outstanding LFY (000) | 127,822 | |
| Book Value Per Share | 1.84 | |
| EBITDA Margin % | 2.70 | |
| Net Margin % | 1.4 | |
| Long-Term Debt / Capital % | 13.6 | |
| Dividends and Yield TTM | 0.14 - 8.81% | |
| Payout Ratio TTM % | 100.0 | |
| 60-Day Average Volume (000) | 265 | |
| 52-Week High & Low | 2.53 - 1.37 | |
| Price / 52-Week High & Low | 0.64 - 1.18 | |

Price, Moving Averages & Volume



SThree Plc is currently trading at its 50 day moving average price of 1.62 and 8.5% below its 200 day moving average price of 1.77.

STEM:LN is currently 36.0% below its 52-week high price of 2.53 and is 17.9% above its 52-week low price of 1.37. Over the past 52-weeks, STEM:LN is down 33.0% while on a calendar year-to-date basis it is down 15.0%.

The Relative Strength Index (RSI) indicator for STEM:LN is currently 60.6. An RSI value of 70 and above is considered overbought and 30 and below oversold.

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London
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Price Performance, Technical Indicators & Risk Metrics

| Price Performance | % Change | Difference vs FTSE 350 | Technical Indicators | |
|----------------------|----------|------------------------|-------------------------------|-------|
| 1-Day % | 3.18 | 3.68 | 50-Day Average Price | 1.62 |
| 1-Week % | 4.64 | 7.24 | Price / 50-Day Average | 1.01 |
| 4-Week % | 8.85 | 5.09 | 200-Day Average Price | 1.77 |
| 52-Week % | -33.03 | -54.72 | Price / 200-Day Average | 0.92 |
| Quarter-to-Date % | 8.99 | 7.06 | RSI - Relative Strength Index | 60.60 |
| Year-to-Date % | -14.97 | -18.51 | Risk Metrics | |
| Last Month % | -14.76 | -7.61 | Price Volatility | 0.05 |
| Last Quarter % | -21.99 | -23.57 | Sharpe Ratio | -0.16 |
| Last Calendar Year % | -35.47 | -55.39 | Sortino Ratio | -0.25 |

5-Year Price Performance vs. FTSE 350

SThree Plc
FTSE 350 Index

Current: 0.41 CAGR: -16.6%
Current: 1.39 CAGR: 6.9%



Over the past five years, SThree Plc's stock price is down 59.4% which is 98.3% below the FTSE 350 Index performance of 38.9% over the same period. SThree Plc's cumulative annualized growth rate (CAGR) over the five year period has been -16.6% while that of the FTSE 350 Index has been 6.9%.

Over the past year, SThree Plc's stock price performance of -33.0% has underperformed that of the FTSE 350 Index by 54.7%. On a year-to-date basis, SThree Plc's stock price performance of -15.0% has underperformed the FTSE 350 Index by 18.5%.

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

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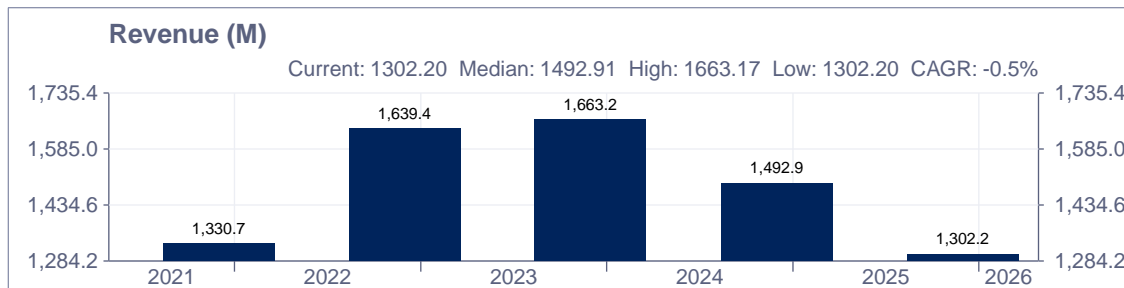
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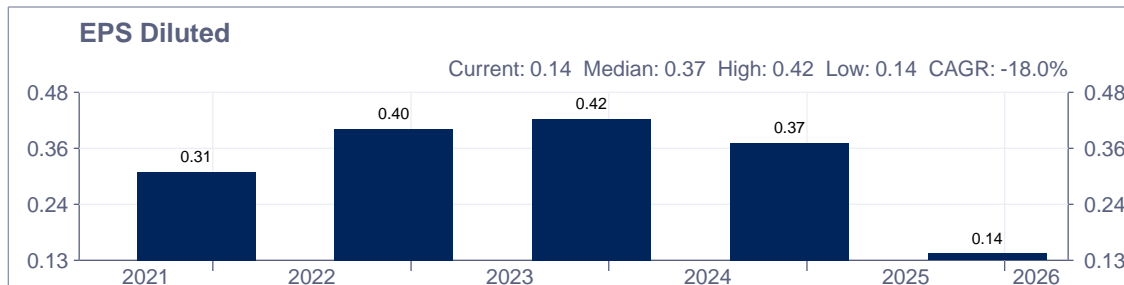
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Growth and Profitability Metrics

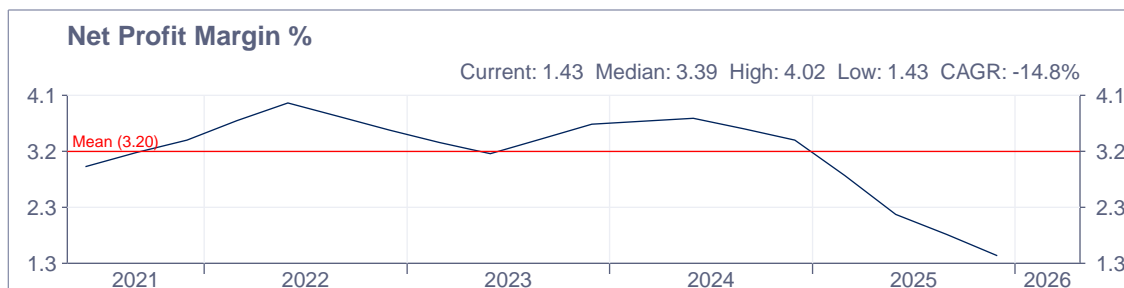
| Historical Growth | 3-Year | 5-Year | 10-Year | Profitability | Current | 5-Year Average | 10-Year Average |
|------------------------|--------|--------|---------|---------------------|---------|----------------|-----------------|
| Revenues % | -7.4 | 1.6 | 4.4 | Gross Margin % | 24.8 | 25.6 | 25.8 |
| Revenues Per Share % | -6.1 | 2.2 | 4.6 | EBITDA Margin % | 2.7 | 4.8 | 4.4 |
| EBITDA % | -26.2 | -3.4 | -1.7 | Pre-Tax Margin % | 2.0 | 4.2 | 3.9 |
| EPS Diluted % | -30.6 | -3.3 | -3.3 | Net Margin % | 1.4 | 3.2 | 3.0 |
| Free Cash Flow % | 9.7 | -2.2 | 3.7 | Return on Equity % | 8.1 | 26.0 | 32.6 |
| Cash from Operations % | 10.6 | -1.5 | 2.9 | Return on Capital % | 7.1 | 23.4 | 31.6 |
| Book Value % | 7.3 | 13.7 | 14.9 | Return on Assets % | 4.0 | 11.3 | 11.7 |



SThree Plc's cumulative annualized revenue growth rate over the charted period is -0.5%. This compares to cumulative annualized growth of -7.4% over the past 3 years.



SThree Plc's cumulative annualized EPS growth rate over the charted period is -18.0%. This compares to cumulative annualized growth of -30.6% over the past 3 years.



SThree Plc's net profit margin of 1.4% is 1.8% below the period's mean net margin of 3.2%. During the charted period, the observed net profit margin high and low were 4.0% and 1.4% respectively.



SThree Plc's return on equity of 8.1% is 17.9% below the period's mean return on equity of 26.0%. During the charted period, the observed ROE high and low were 37.3% and 8.1% respectively.

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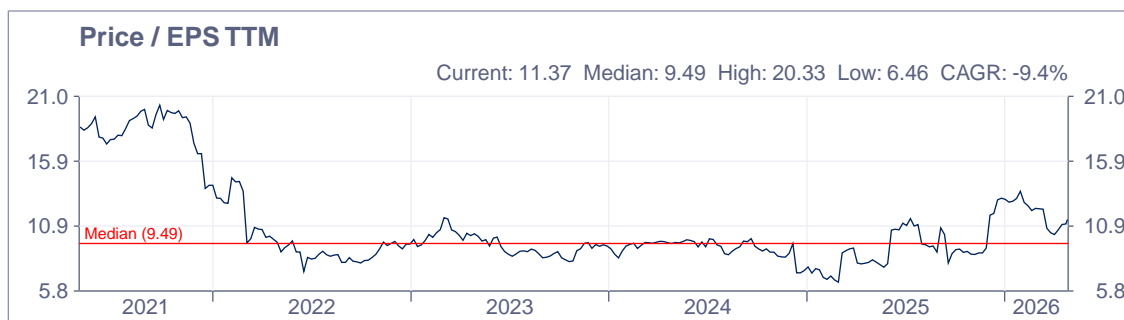
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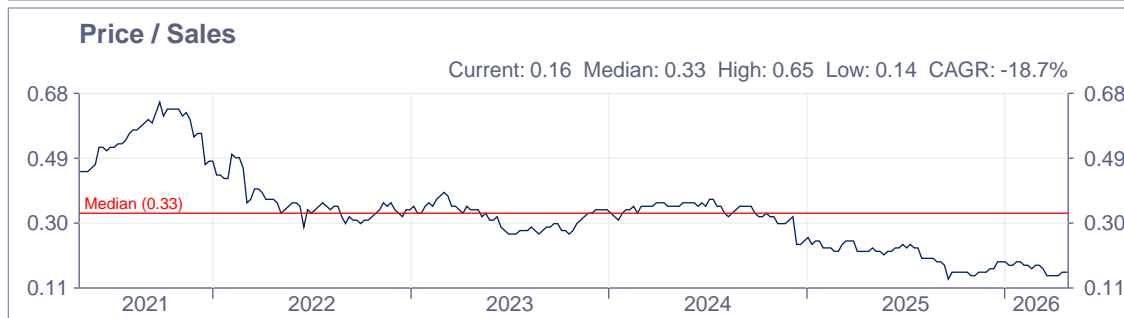
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Valuation Metrics

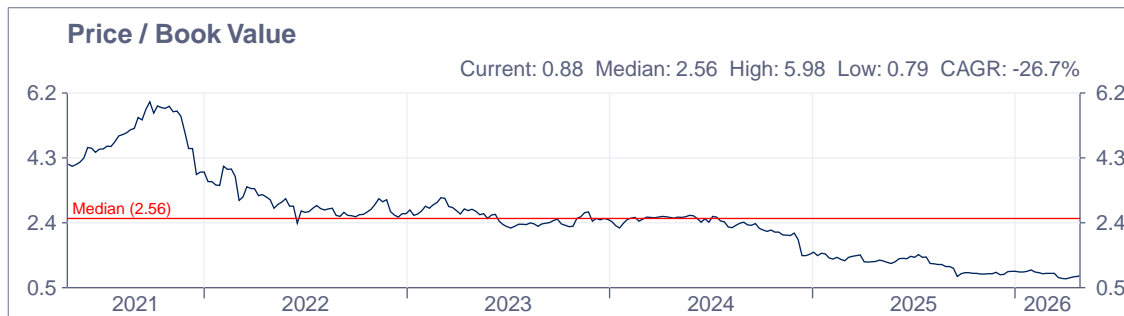
| | Current | 5-Year Median | 10-Year Median | | Current | 5-Year Median | 10-Year Median |
|-----------------------------|---------|---------------|----------------|---------------------------|---------|---------------|----------------|
| Price / EPS TTM | 11.4 | 9.5 | 10.6 | Earnings Yield % | 8.80 | 10.54 | 9.43 |
| Price / Sales | 0.2 | 0.3 | 0.3 | Free Cash Flow Yield % | 12.48 | 3.84 | 3.69 |
| Price / Operating Cash Flow | 7.7 | 8.2 | 8.7 | Dividend Yield % | 8.81 | 3.83 | 4.19 |
| Price / Book Value | 0.9 | 2.6 | 3.3 | Enterprise Value / EBITDA | 5.0 | 5.8 | 6.7 |



SThree Plc is trading at 11.37 times its EPS generated during the latest fiscal year. This multiple is above the historically observed median of 9.49, while high and low observations have been 20.33 and 6.46.



SThree Plc is trading at a Price to Sales ratio of 0.16 based on sales generated during the latest fiscal year. This ratio is below the historically observed median ratio of 0.33, while high and low observations have been 0.65 and 0.14.



SThree Plc is trading at a Price to Book ratio of 0.88 based on book value at the latest fiscal year end. This ratio is below the historically observed median of 2.56, while high and low observations have been 5.98 and 0.79.



SThree Plc has a Free Cash Flow Yield of 12.48% based on free cash flow generated during the latest fiscal year. This value is above the historically observed median yield of 3.84%, while high and low observations have been 13.93 and 1.68.

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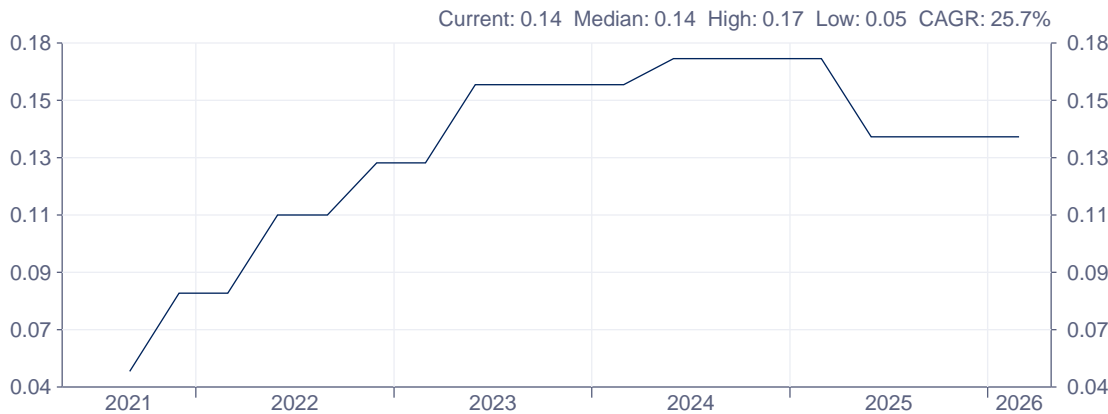
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Dividends Data

| Dividends Per Share TTM | | 0.14 | Payout Ratio TTM % | | 100.00% | Dividend Yield TTM % | | 8.81% |
|-------------------------|------------|-------------|--------------------|----------|---------|----------------------|--|-------|
| Rate | Ex Date | Record Date | Payment Date | Currency | Note | | | |
| 0.092 | 14-05-2026 | 15-05-2026 | 12-06-2026 | GBP | | | | |
| 0.051 | 13-11-2025 | 14-11-2025 | 12-12-2025 | GBP | | | | |
| 0.092 | 08-05-2025 | 09-05-2025 | 06-06-2025 | GBP | | | | |
| 0.051 | 07-11-2024 | 08-11-2024 | 06-12-2024 | GBP | | | | |
| 0.116 | 09-05-2024 | 10-05-2024 | 07-06-2024 | GBP | | | | |
| 0.050 | 09-11-2023 | 10-11-2023 | 08-12-2023 | GBP | | | | |
| 0.110 | 11-05-2023 | 12-05-2023 | 09-06-2023 | GBP | | | | |
| 0.050 | 03-11-2022 | 04-11-2022 | 02-12-2022 | GBP | | | | |
| 0.080 | 05-05-2022 | 06-05-2022 | 10-06-2022 | GBP | | | | |
| 0.030 | 04-11-2021 | 05-11-2021 | 03-12-2021 | GBP | | | | |
| 0.050 | 06-05-2021 | 07-05-2021 | 04-06-2021 | GBP | | | | |

Dividend Growth and Yield

Dividends Per Share TTM



SThree Plc's trailing 12-month dividend per share is 0.14 and its dividend has grown at a cumulative annualized rate of 25.7% over the charted period. This compares to dividend growth of 0.00% over the past year and cumulative annualized growth of -3.70% over the past 3 years.

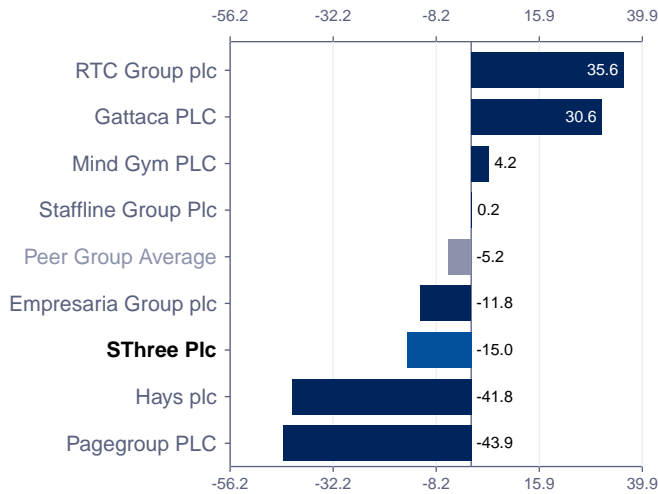
Dividend Yield TTM %



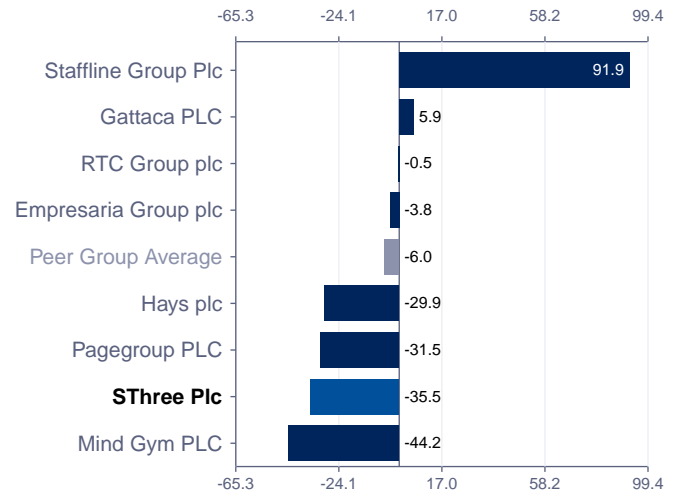
SThree Plc's current dividend yield is 8.81% based on trailing 12 month dividends. The current yield is above the historically observed median of 3.84% and, over the charted time period, the observed high yield has been 9.88% and the observed low yield has been 0.00%.

ICB Subsector Peer Comparisons

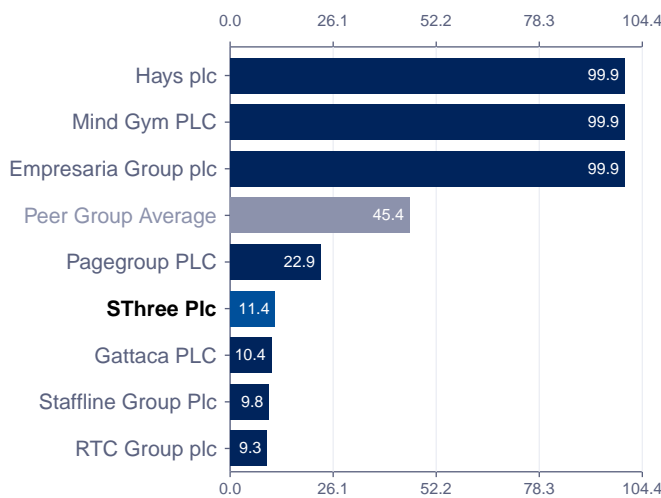
Price Change Year to Date %



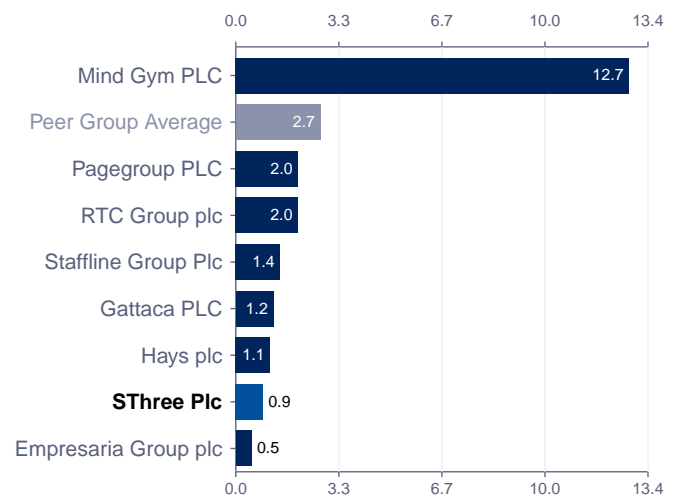
Price Change Last Calendar Year %



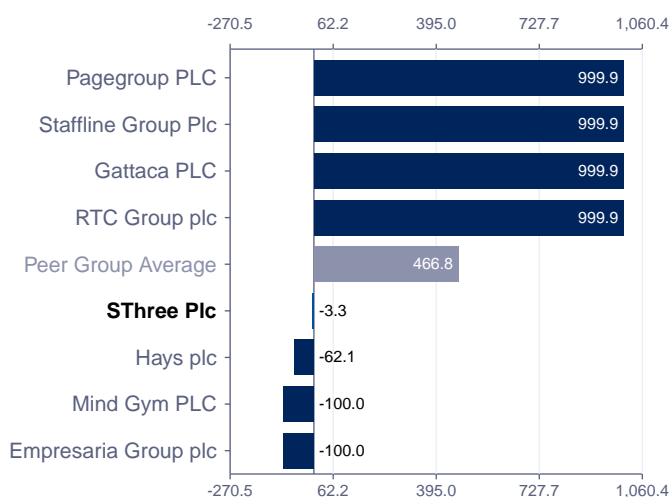
Price / EPS TTM



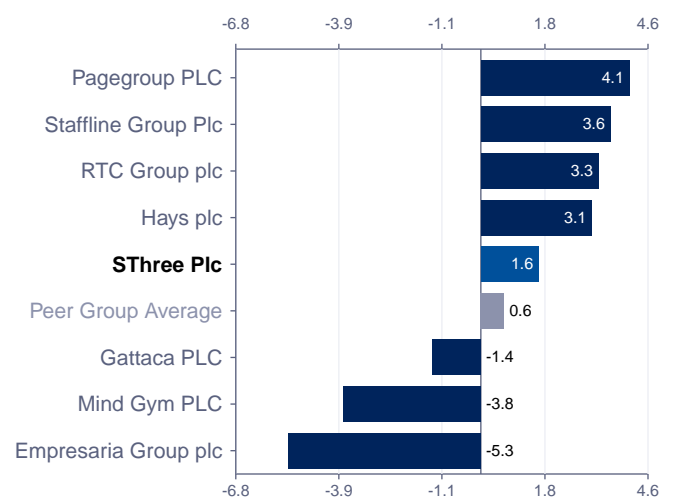
Price / Book Value



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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