

TI Fluid Systems PLC (TIFS:LN)



London
Stock Exchange

Consumer Discretionary/Auto Parts

Price: 146.20

Report Date: April 18, 2024

Business Description and Key Statistics

TI Fluid Systems plc is a United Kingdom-based company, which is a manufacturer of engineered automotive fluid storage, carrying, delivery and thermal management systems for light vehicles. The Company operates through two segments: Fluid Carrying Systems (FCS) and Fuel Tank and Delivery Systems (FTDS). The FCS segment manufactures brake and fuel lines and bundles, thermal management fluid systems including hybrid electric vehicle (HEV) and battery electric vehicle (BEV), heating and cooling lines, powertrain components and quick connectors. The FTDS segment produces fuel tank systems and pumps and module fuel delivery systems, including HEV pressure-resistant fuel tanks. FTDS products include plastic fuel tanks, filler pipes, pumps and modules and level sensors. Its geographic sub-divisions, include North America, Europe, Asia Pacific and Latin America. It has manufacturing facilities near original equipment manufacturer (OEM) assembly plants in over 98 locations across 28 countries.

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

ICB Industry: Consumer Discretionary

ICB Subsector: Auto Parts

Address: TI Automotive, 4650 Kingsgate
OXFORD OX4 2SU
GBR

Employees: 27,600

	Current	YTY % Chg
Revenue LFY (M)	3,516	7.6
EPS Diluted LFY	0.16	
Market Value (M)	756	
Shares Outstanding LFY (000)	516,814	
Book Value Per Share	1.29	
EBITDA Margin %	8.10	
Net Margin %	2.4	
Long-Term Debt / Capital %	62.7	
Dividends and Yield TTM	0.07 - 2.63%	
Payout Ratio TTM %	23.7	
60-Day Average Volume (000)	1,778	
52-Week High & Low	169.20 - 99.80	
Price / 52-Week High & Low	0.86 - 1.46	

Price, Moving Averages & Volume



TI Fluid Systems PLC is currently trading at 146.20 which is 3.9% below its 50 day moving average price of 152.16 and 5.7% above its 200 day moving average price of 138.36.

TIFS:LN is currently 13.6% below its 52-week high price of 169.20 and is 46.5% above its 52-week low price of 99.80. Over the past 52-weeks, TIFS:LN is up 45.6% while on a calendar year-to-date basis it is down 4.9%.

The Relative Strength Index (RSI) indicator for TIFS:LN is currently 45.19. 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 %	3.10	2.70	50-Day Average Price	152.16
1-Week %	-1.22	-0.48	Price / 50-Day Average	0.96
4-Week %	-6.76	-8.31	200-Day Average Price	138.36
52-Week %	45.62	45.67	Price / 200-Day Average	1.06
Quarter-to-Date %	1.53	2.65	RSI - Relative Strength Index	45.19
Year-to-Date %	-4.94	-6.36	Risk Metrics	
Last Month %	-5.26	-9.51	Price Volatility	9.50
Last Quarter %	-6.37	-8.94	Sharpe Ratio	-0.01
Last Calendar Year %	15.12	11.24	Sortino Ratio	-0.02

5-Year Price Performance vs. FTSE 350

TI Fluid Systems PLC
FTSE 350 Index

Current: 0.71 CAGR: -6.6%
Current: 1.05 CAGR: 1.0%



Over the past five years, TI Fluid Systems PLC's stock price is down 29.0% which is 34.0% below the FTSE 350 Index performance of 5.0% over the same period. TI Fluid Systems PLC's cumulative annualized growth rate (CAGR) over the five year period has been -6.6% while that of the FTSE 350 Index has been 1.0%.

Over the past year, TI Fluid Systems PLC's stock price performance of 45.6% has outperformed that of the FTSE 350 Index by 45.7%. On a year-to-date basis, TI Fluid Systems PLC's stock price performance of -4.9% has outperformed the FTSE 350 Index by 6.4%.

Over the past week, TI Fluid Systems PLC's stock price performance of -1.2% has underperformed that of the FTSE 350 Index by 0.5%.

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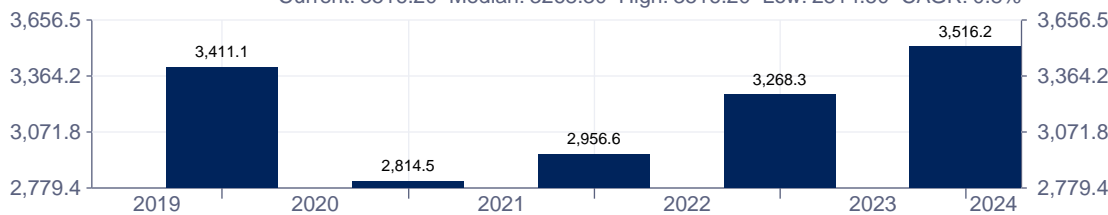
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Growth and Profitability Metrics

Historical Growth	3-Year	5-Year	10-Year	Profitability	Current	5-Year Average	10-Year Average
Revenues %	7.7	0.2		Gross Margin %	13.0	11.4	13.8
Revenues Per Share %	7.9	-4.6		EBITDA Margin %	8.1	8.3	9.1
EBITDA %	6.7	-5.6		Pre-Tax Margin %	3.4	-1.3	1.2
EPS Diluted %	999.9	-9.4		Net Margin %	2.4	-2.2	-0.4
Free Cash Flow %	-8.2	-7.7		Return on Equity %	12.8	-7.7	-2.1
Cash from Operations %	-2.9	-4.5		Return on Capital %	4.5	-3.1	-0.4
Book Value %	-8.0	-8.7		Return on Assets %	3.0	-2.2	-0.3

Revenue (M)

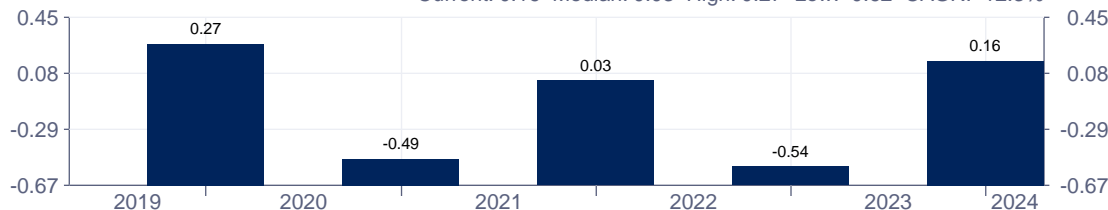
Current: 3516.20 Median: 3268.30 High: 3516.20 Low: 2814.50 CAGR: 0.8%



TI Fluid Systems PLC's cumulative annualized revenue growth rate over the charted period is 0.8%. This compares to cumulative annualized growth of 7.7% over the past 3 years.

EPS Diluted

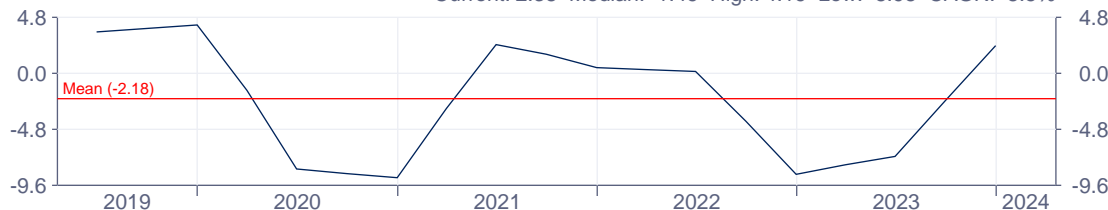
Current: 0.16 Median: 0.03 High: 0.27 Low: -0.62 CAGR: -12.3%



TI Fluid Systems PLC's cumulative annualized EPS growth rate over the charted period is -12.3%. This compares to cumulative annualized growth of 999.9% over the past 3 years.

Net Profit Margin %

Current: 2.38 Median: -1.46 High: 4.16 Low: -8.98 CAGR: -8.5%



TI Fluid Systems PLC's net profit margin of 2.4% is 4.6% above the period's mean net margin of -2.2%. During the charted period, the observed net profit margin high and low were 4.2% and -9.0% respectively.

Return on Equity %

Current: 12.80 Median: -4.20 High: 12.80 Low: -33.50 CAGR: 2.6%



TI Fluid Systems PLC's return on equity of 12.8% is 20.5% above the period's mean return on equity of -7.7%. During the charted period, the observed ROE high and low were 12.8% and -33.5% respectively.

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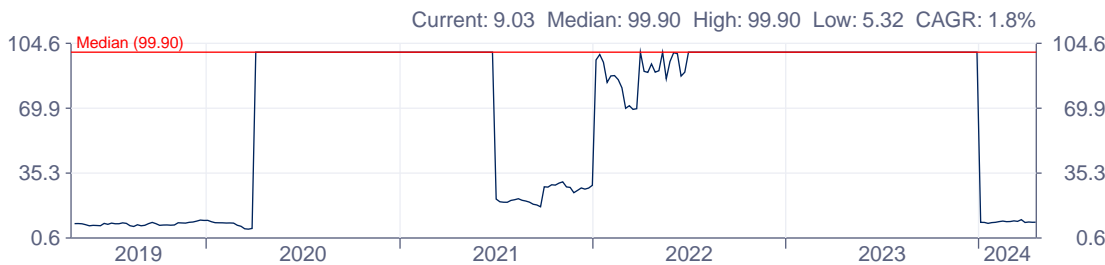
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Valuation Metrics

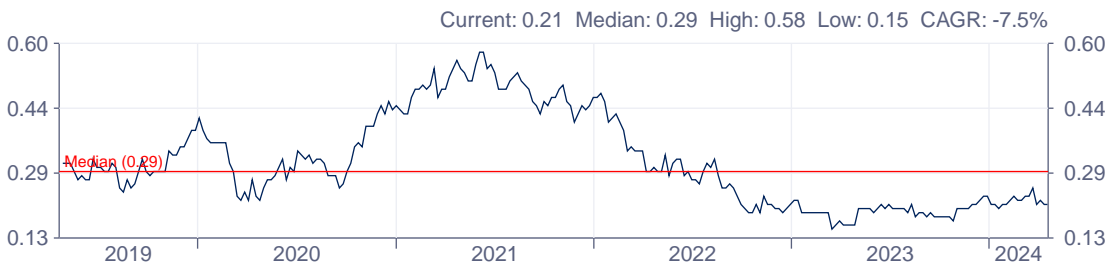
	Current	5-Year Median	10-Year Median		Current	5-Year Median	10-Year Median
Price / EPS TTM	9.0	99.0		Earnings Yield %	11.08	0.50	
Price / Sales	0.2	0.3		Free Cash Flow Yield %	7.39	5.11	
Price / Operating Cash Flow	4.4	11.6		Dividend Yield %	2.63	2.29	
Price / Book Value	1.1	1.1		Enterprise Value / EBITDA	5.2	6.8	

Price / EPS TTM



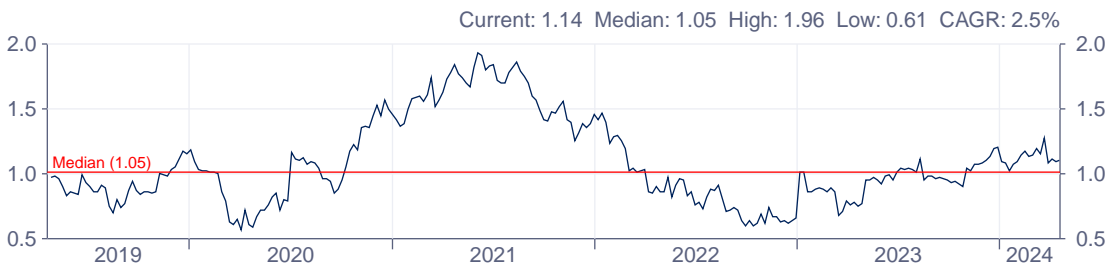
TI Fluid Systems PLC is trading at 9.03 times its EPS generated during the latest fiscal year. This multiple is below the historically observed median of 99.90, while high and low observations have been 99.90 and 5.32.

Price / Sales



TI Fluid Systems PLC is trading at a Price to Sales ratio of 0.21 based on sales generated during the latest fiscal year. This ratio is below the historically observed median ratio of 0.29, while high and low observations have been 0.58 and 0.15.

Price / Book Value



TI Fluid Systems PLC is trading at a Price to Book ratio of 1.14 based on book value at the latest fiscal year end. This ratio is above the historically observed median of 1.05, while high and low observations have been 1.96 and 0.61.

Free Cash Flow Yield %



TI Fluid Systems PLC has a Free Cash Flow Yield of 7.39% based on free cash flow generated during the latest fiscal year. This value is above the historically observed median yield of 5.07%, while high and low observations have been 14.02 and 2.05.

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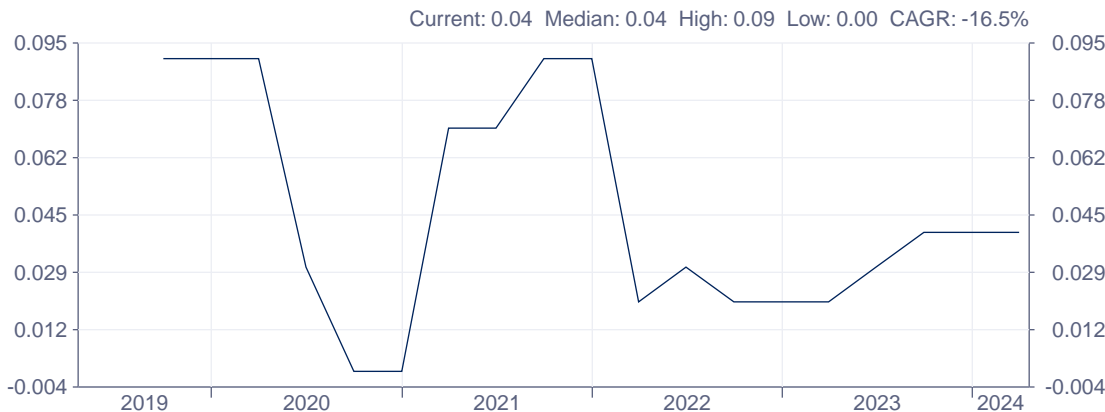
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Dividends Data

Dividends Per Share TTM	0.07	Payout Ratio TTM %	23.71%	Dividend Yield TTM %	2.63%
Rate	Ex Date	Record Date	Payment Date	Currency	Note
0.045	23-05-2024	24-05-2024	21-06-2024	EUR	
0.023	17-08-2023	18-08-2023	15-09-2023	EUR	
0.015	25-05-2023	26-05-2023	23-06-2023	EUR	
0.010	18-08-2022	19-08-2022	16-09-2022	EUR	
0.015	26-05-2022	27-05-2022	23-06-2022	EUR	
0.019	19-08-2021	20-08-2021	30-09-2021	EUR	
0.067	04-02-2021	05-02-2021	19-02-2021	EUR	
0.030	15-08-2019	16-08-2019	27-09-2019	EUR	
0.059	25-04-2019	26-04-2019	31-05-2019	EUR	
0.030	16-08-2018	17-08-2018	28-09-2018	EUR	
0.013	26-04-2018	27-04-2018	01-06-2018	EUR	

Dividend Growth and Yield

Dividends Per Share TTM



TI Fluid Systems PLC's trailing 12-month dividend per share is 0.04 and its dividend has grown at a cumulative annualized rate of -16.5% over the charted period. This compares to dividend growth of 168.90% over the past year and cumulative annualized growth of 0.40% over the past 3 years.

Dividend Yield TTM %



TI Fluid Systems PLC's current dividend yield is 2.63% based on trailing 12 month dividends. The current yield is above the historically observed median of 2.29% and, over the charted time period, the observed high yield has been 6.57% and the observed low yield has been 0.00%.

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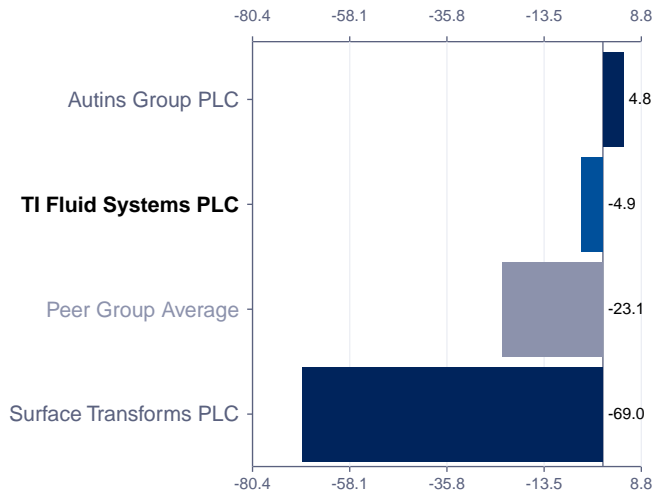
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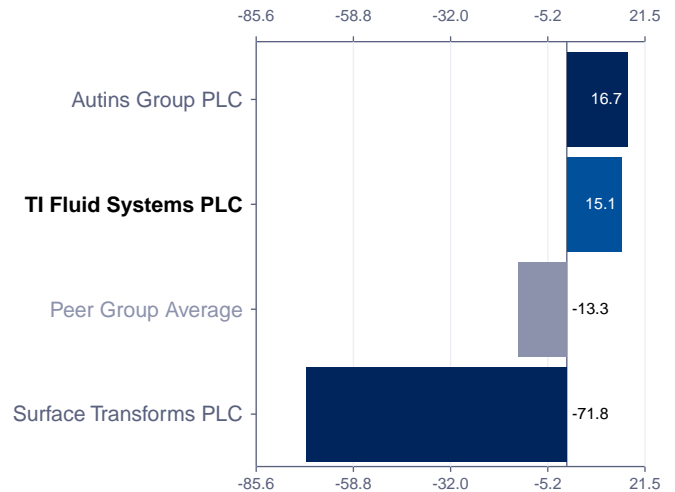
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ICB Subsector Peer Comparisons

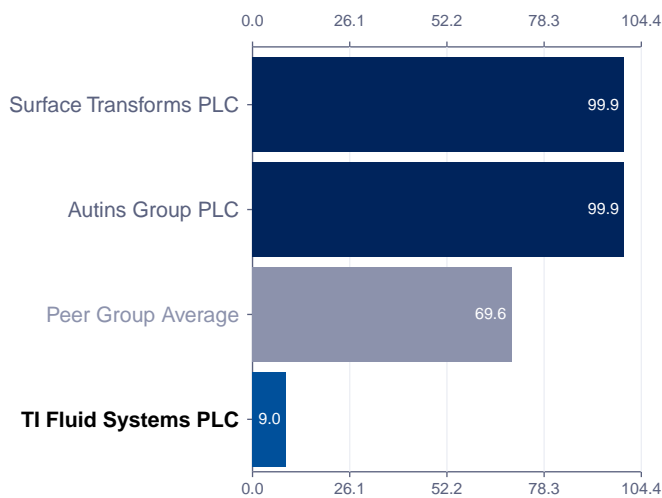
Price Change Year to Date %



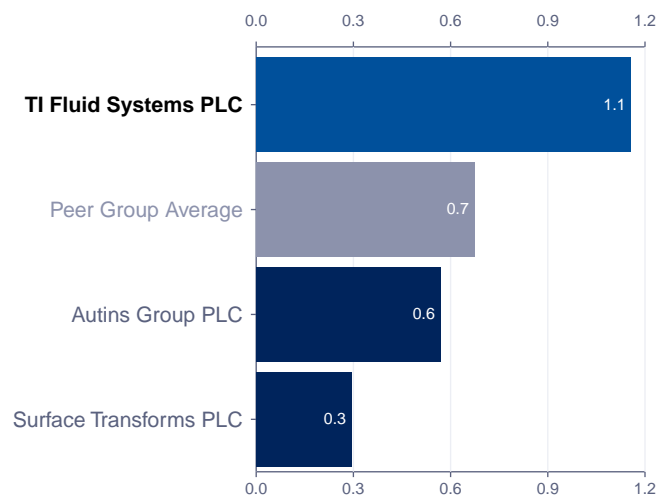
Price Change Last Calendar Year %



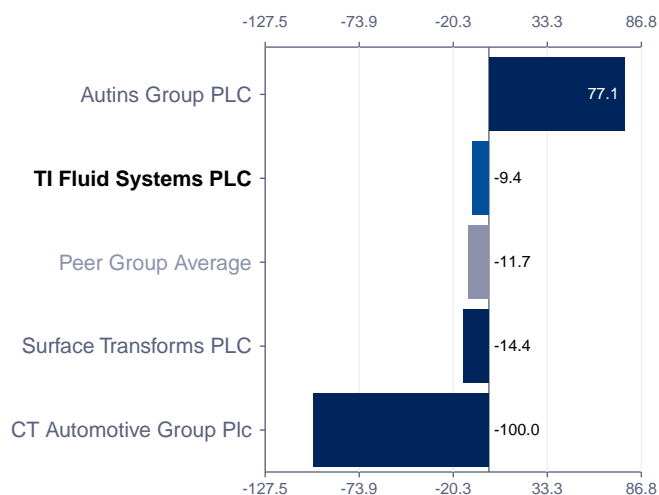
Price / EPS TTM



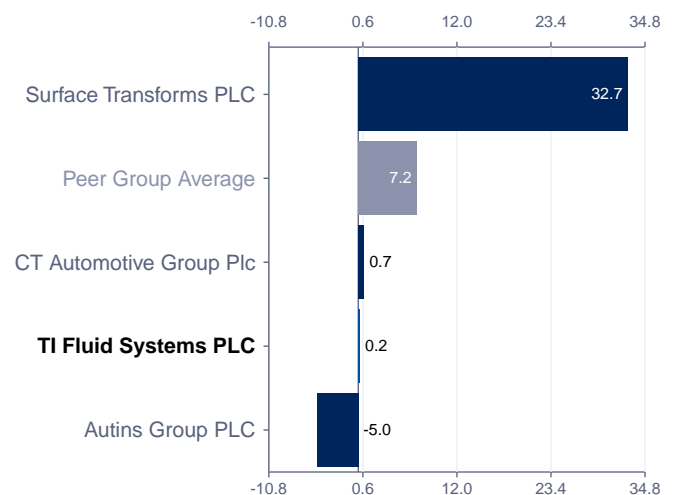
Price / Book Value



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.

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 = 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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