

Tristel PLC, Snailwell (TSTL:LN)



London
Stock Exchange

Health Care/Health Care Services

Price: 447.50

Report Date: March 27, 2024

Business Description and Key Statistics

Tristel plc is a United Kingdom-based manufacturer of infection prevention products. The Company's core business is the sale to hospitals of its chlorine dioxide chemistry used for the decontamination of medical devices under the Tristel brand, and for the sporidical disinfection of environmental surfaces under the Cache brand. The Company's segments include Hospital medical device decontamination, Hospital environmental surface disinfection and others. The Company manufactures and sells medical device decontamination products which are used primarily for infection control in hospitals. The Company also manufactures and sells hospital environmental surface disinfection products. The Company is also focused on pharmaceutical and personal care product manufacturing industries, veterinary and animal welfare sectors. The Tristel brand offers airway management, cardiology, ear, nose and throat, ophthalmology, endoscopy, surfaces, ultrasound, urology, hand hygiene and women's health.

Website: <https://tristel.com/hk-en/>

ICB Industry: Health Care

ICB Subsector: Health Care Services

Address: Lynx Business Park, Fordham Road
SNAILWELL CB8 7NY
GBR

Employees: 213

	Current	YTY % Chg
Revenue LFY (M)	36	13.0
EPS Diluted LFY	0.09	385.9
Market Value (M)	212	
Shares Outstanding LFY (000)	47,391	
Book Value Per Share	0.66	
EBITDA Margin %	19.00	
Net Margin %	15.4	
Long-Term Debt / Capital %	14.2	
Dividends and Yield TTM	0.13 - 2.35%	
Payout Ratio TTM %	82.4	
60-Day Average Volume (000)	53	
52-Week High & Low	485.00 - 325.00	
Price / 52-Week High & Low	0.92 - 1.38	

Price, Moving Averages & Volume



Tristel PLC, Snailwell is currently trading at 447.50 which is 2.6% below its 50 day moving average price of 459.62 and 9.0% above its 200 day moving average price of 410.58.

TSTL:LN is currently 7.7% below its 52-week high price of 485.00 and is 37.7% above its 52-week low price of 325.00. Over the past 52-weeks, TSTL:LN is up 36.6% while on a calendar year-to-date basis it is down 2.7%.

The Relative Strength Index (RSI) indicator for TSTL:LN is currently 36.86. 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 %	0.00	-0.03	50-Day Average Price	459.62
1-Week %	-2.72	-5.12	Price / 50-Day Average	0.97
4-Week %	-6.77	-10.82	200-Day Average Price	410.58
52-Week %	36.64	30.42	Price / 200-Day Average	1.09
Quarter-to-Date %	-2.72	-5.01	RSI - Relative Strength Index	36.86
Year-to-Date %	-2.72	-5.01	Risk Metrics	
Last Month %	1.59	1.82	Price Volatility	10.88
Last Quarter %	3.37	0.89	Sharpe Ratio	0.10
Last Calendar Year %	17.95	14.07	Sortino Ratio	0.21

5-Year Price Performance vs. FTSE 350

Tristel PLC, Snailwell
FTSE 350 Index

Current: 1.63 CAGR: 10.2%
Current: 1.08 CAGR: 1.6%



Over the past five years, Tristel PLC, Snailwell's stock price is up 62.7% which is 54.3% above the FTSE 350 Index performance of 8.4% over the same period. Tristel PLC, Snailwell's cumulative annualized growth rate (CAGR) over the five year period has been 10.2% while that of the FTSE 350 Index has been 1.6%.

Over the past year, Tristel PLC, Snailwell's stock price performance of 36.6% has outperformed that of the FTSE 350 Index by 30.4%. On a year-to-date basis, Tristel PLC, Snailwell's stock price performance of -2.7% has outperformed the FTSE 350 Index by 5.0%.

Over the past week, Tristel PLC, Snailwell's stock price performance of -2.7% has underperformed that of the FTSE 350 Index by 5.1%.

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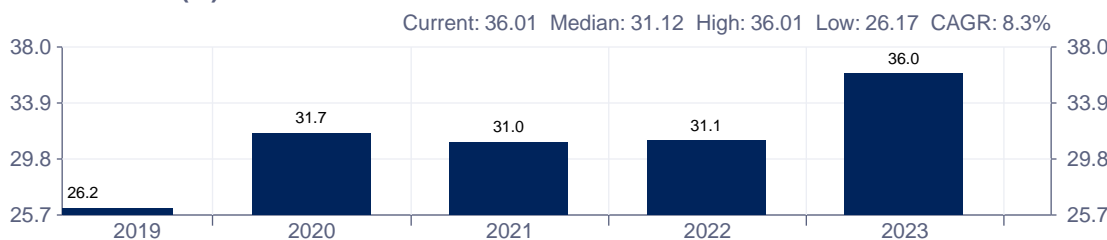
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Growth and Profitability Metrics

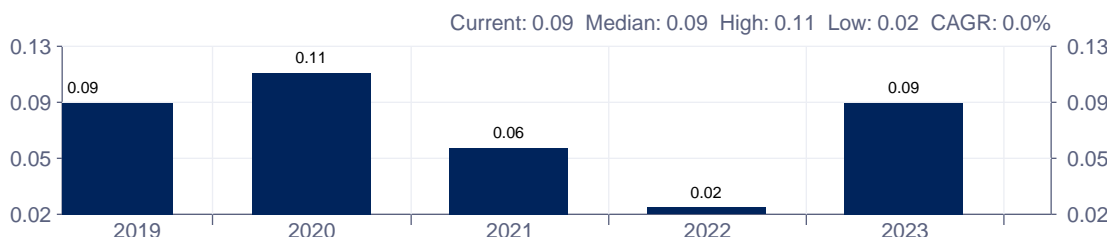
Historical Growth	3-Year	5-Year	10-Year	Profitability	Current	5-Year Average	10-Year Average
Revenues %	5.3	10.9	12.1	Gross Margin %	82.6	80.0	76.8
Revenues Per Share %	4.8	9.5	10.1	EBITDA Margin %	19.0	20.5	20.2
EBITDA %	-4.4	7.6	12.8	Pre-Tax Margin %	15.6	14.0	15.4
EPS Diluted %	3.1	9.6	17.7	Net Margin %	15.4	11.5	12.8
Free Cash Flow %	9.7	11.5	11.9	Return on Equity %	20.0	13.8	15.5
Cash from Operations %	9.6	12.3	14.0	Return on Capital %	17.5	12.7	15.2
Book Value %	1.8	7.1	8.7	Return on Assets %	15.1	10.6	12.6

Revenue (M)



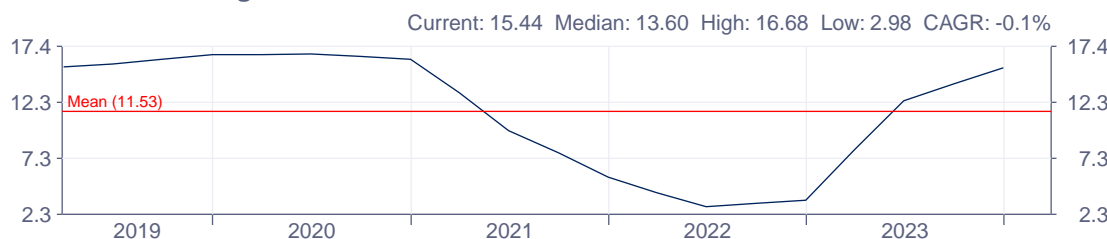
Tristel PLC, Snailwell's cumulative annualized revenue growth rate over the charted period is 8.3%. This compares to cumulative annualized growth of 5.3% over the past 3 years.

EPS Diluted



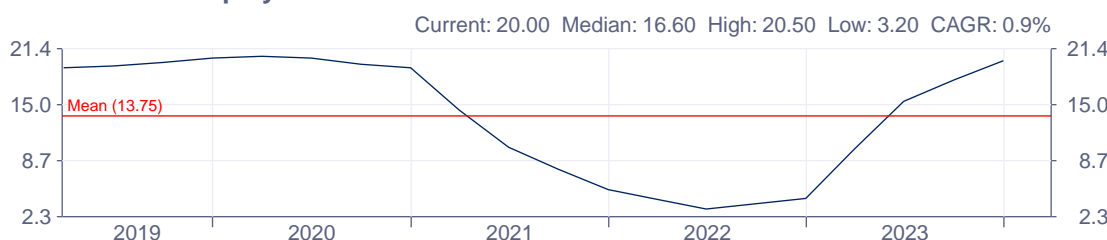
Tristel PLC, Snailwell's cumulative annualized EPS growth rate over the charted period is 0.0%. This compares to cumulative annualized growth of 3.1% over the past 3 years.

Net Profit Margin %



Tristel PLC, Snailwell's net profit margin of 15.4% is 3.9% above the period's mean net margin of 11.5%. During the charted period, the observed net profit margin high and low were 16.7% and 3.0% respectively.

Return on Equity %



Tristel PLC, Snailwell's return on equity of 20.0% is 6.3% 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 3.2% respectively.

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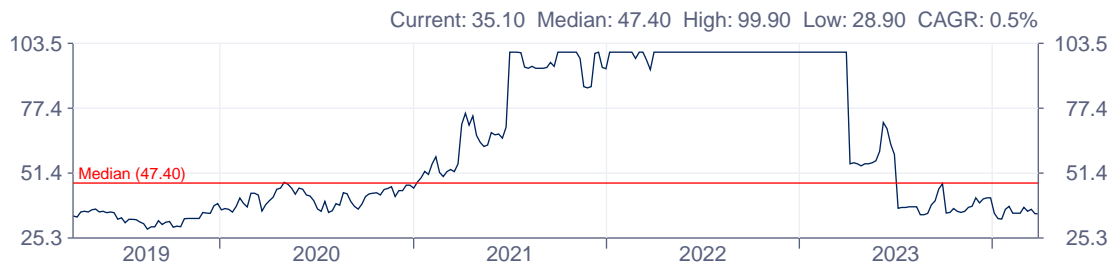
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Valuation Metrics

	Current	5-Year Median	10-Year Median		Current	5-Year Median	10-Year Median
Price / EPS TTM	35.1	47.4	35.3	Earnings Yield %	2.85	2.11	2.83
Price / Sales	5.4	5.7	5.2	Free Cash Flow Yield %	1.80	1.32	1.57
Price / Operating Cash Flow	29.2	37.6	29.1	Dividend Yield %	2.35	1.59	1.63
Price / Book Value	6.8	6.6	6.0	Enterprise Value / EBITDA	27.7	27.8	23.4

Price / EPS TTM



Tristel PLC, Snailwell is trading at 35.10 times its EPS generated during the latest fiscal year. This multiple is below the historically observed median of 47.40, while high and low observations have been 99.90 and 28.90.

Price / Sales



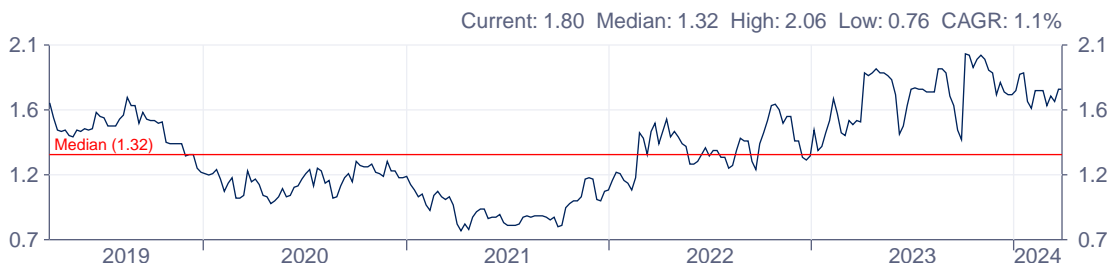
Tristel PLC, Snailwell is trading at a Price to Sales ratio of 5.42 based on sales generated during the latest fiscal year. This ratio is below the historically observed median ratio of 5.71, while high and low observations have been 9.95 and 4.00.

Price / Book Value



Tristel PLC, Snailwell is trading at a Price to Book ratio of 6.81 based on book value at the latest fiscal year end. This ratio is above the historically observed median of 6.64, while high and low observations have been 10.92 and 4.93.

Free Cash Flow Yield %



Tristel PLC, Snailwell has a Free Cash Flow Yield of 1.80% based on free cash flow generated during the latest fiscal year. This value is above the historically observed median yield of 1.32%, while high and low observations have been 2.06 and 0.76.

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Dividends Data

Dividends Per Share TTM		0.13	Payout Ratio TTM %		82.35%	Dividend Yield TTM %		2.35%
Rate	Ex Date	Record Date	Payment Date	Currency	Note			
0.052	21-03-2024	22-03-2024	12-04-2024	GBP				
0.079	23-11-2023	24-11-2023	22-12-2023	GBP				
0.026	16-03-2023	17-03-2023	11-04-2023	GBP				
0.039	17-11-2022	18-11-2022	16-12-2022	GBP				
0.026	07-04-2022	08-04-2022	29-04-2022	GBP				
0.039	18-11-2021	19-11-2021	16-12-2021	GBP				
0.026	08-04-2021	09-04-2021	30-04-2021	GBP				
0.038	19-11-2020	20-11-2020	18-12-2020	GBP				
0.023	26-03-2020	27-03-2020	30-04-2020	GBP				
0.035	21-11-2019	22-11-2019	20-12-2019	GBP				
0.020	28-03-2019	29-03-2019	30-04-2019	GBP				
0.030	15-11-2018	16-11-2018	14-12-2018	GBP				

Dividend Growth and Yield

Dividends Per Share TTM

Current: 0.10 Median: 0.06 High: 0.10 Low: 0.04 CAGR: 16.6%



Tristel PLC, Snailwell's trailing 12-month dividend per share is 0.10 and its dividend has grown at a cumulative annualized rate of 16.6% over the charted period. This compares to dividend growth of 43.10% over the past year and cumulative annualized growth of 50.60% over the past 3 years.

Dividend Yield TTM %

Current: 2.35 Median: 1.59 High: 2.80 Low: 0.56 CAGR: 7.1%



Tristel PLC, Snailwell's current dividend yield is 2.35% based on trailing 12 month dividends. The current yield is above the historically observed median of 1.59% and, over the charted time period, the observed high yield has been 2.80% and the observed low yield has been 0.56%.

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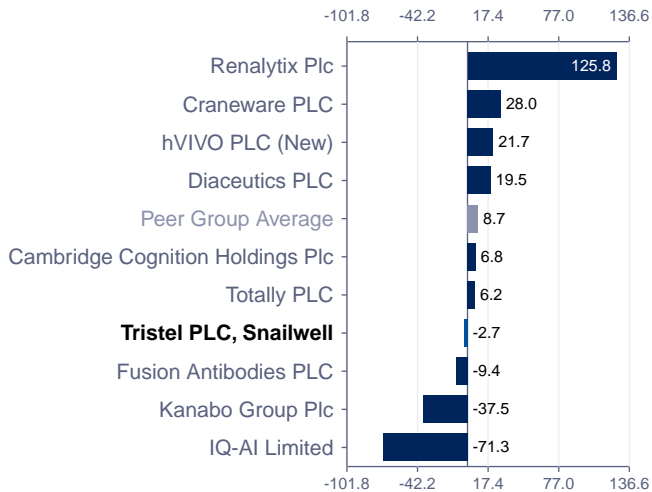
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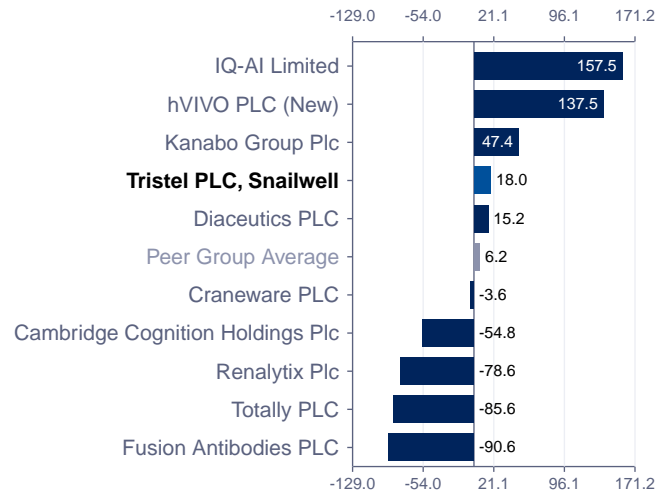
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ICB Subsector Peer Comparisons

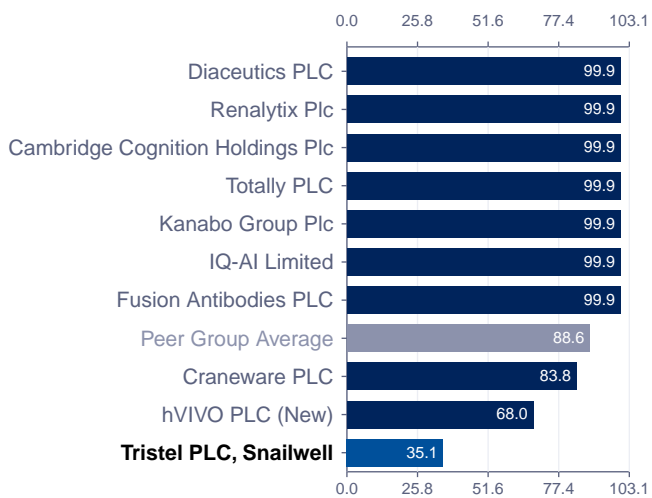
Price Change Year to Date %



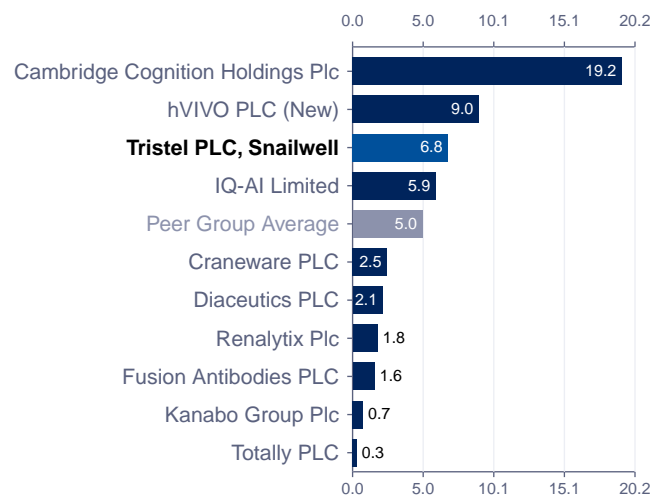
Price Change Last Calendar Year %



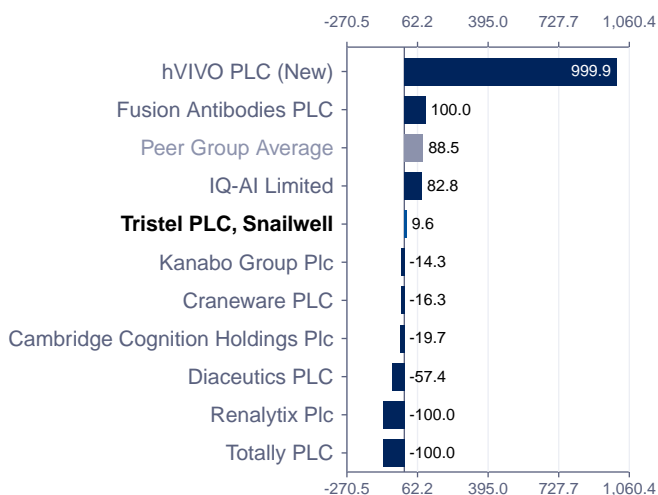
Price / EPS TTM



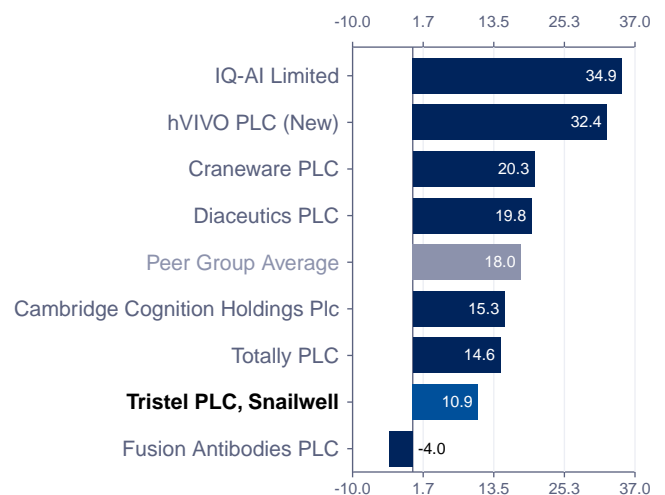
Price / Book Value



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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