

Escher Group

ESCH  197.5p  0.0 0.0%

Market Cap	£36.9m	Value	40
Enterprise Value	£40.1m	Quality	47
Revenue	£13.6m	Momentum	▼ 38
Position in UK Edition	1156th	StockRank™	▼ 34

Zoom 1m 3m 6m YTD 1y 2y 3y 5y All



Momentum

Relative Strength (%)	
1m	+3.4%
3m	-14.9%
1yr	-39.7%
Volume Change (%)	
10d v 3m	-74.3%
Price vs... (%)	
52w High	-38.3%
50d MA	-5.09%
200d MA	-12.6%

Growth & Value

12m Forecast Rolling		vs. industry	vs. market
PE Ratio (f)	15.9		
PEG Ratio (f)	0.24		
EPS Growth (f)	198.2 %		
Dividend Yield (f)	n/a %		
Valuation (ttm)			
Price to Book Value	1.63		
Price to Tang. Book	n/a		
Price to Free Cashflow	n/a		
Price to Sales	2.72		
EV to EBITDA	34.9		

Margin of Safety (beta)

Broker Target	
Relative to Sector	-66%
Graham Formula	-65%
Stability Value (EPV)	-81%

Screens Passed 1

ESCH qualifies for **R&D Breakthroughs Screen...** (in *Quality Investing*).

[View Screen](#) · [View Checklist](#)

Quality

		vs. industry	vs. market
Return on Capital	0.28 %		
Return on Equity	-2.74 %		
Operating Margin	0.55 %		

Financial Summary

Balance Sheet · Income Statement · Cashflow

Year End 31st Dec		2009	2010	2011	2012	2013	2014	2015E	2016E	CAGR / Avg
Revenue	\$m	14.9	14.0	13.9	23.0	24.7	21.1	25.5	25.6	+7.3%
Operating Profit	\$m	4.42	4.09	2.49	4.92	2.05	0.12			-51.7%
Net Profit	\$m	0.93	1.47	0.61	3.00	0.92	-1.00			
EPS Reported	\$	0.055	0.087	0.054	0.17	0.048	-0.054			
EPS Normalised	\$	0.055	0.087	0.092	0.17	0.048	-0.054	0.21	0.18	
EPS Growth	%	-45.1	+57.3	+6.6	+77.2	-70.6			-12.2	
PE Ratio	x						n/a	15.0	17.1	
PEG	x						n/a	n/a	n/a	
Profitability										
Operating Margin	%	29.8	29.3	18.0	21.4	8.3	0.6			+17.9%
ROA	%		3.8	1.5	6.2	1.7				+17.9%
ROCE	%	47.9	33.2	9.6	11.8	4.5	0.3			+12.6%
ROE	%		49.2	4.1	9.9	2.5	-2.7			
Cashflow										
Op. Cashflow ps	\$	0.023	0.20	0.17	0.23	0.17	-0.044			
Capex ps	\$	0.011	0.073	0.24	0.19	0.17	0.14			+64.8%
Free Cashflow ps	\$	0.012	0.13	-0.070	0.042	-0.006	-0.18			
Dividends										
Dividend ps	\$									
Dividend Growth	%									
Dividend Yield	%									
Dividend Cover	x									
Balance Sheet										
Cash etc	\$m	0.59	0.78	3.44	7.83	6.71	5.72			+57.9%
Working Capital	\$m	-22.6	-20.5	-8.79	3.93	6.63	3.55			+20.7%
Net Fixed Assets	\$m	0.57	0.58	0.72	2.20	1.73	1.45			
Net Debt	\$m	26.0	24.2	8.31	1.75	1.78	4.91			+78.4%
Book Value	\$m	1.96	4.00	25.7	35.1	37.1	35.4			+1.9%
Average Shares	m	17.0	17.0	11.3	18.4	19.2	18.7			+75.1%
Book Value ps	\$	0.12	0.24	1.51	1.88	1.99	1.90			

Health Trend

Piotroski F-Score 3



Bankruptcy Risk

Altman Z2-Score 3.96



Earnings Manipulation Risk

Low

Magic Formula Score

1772 46% C-



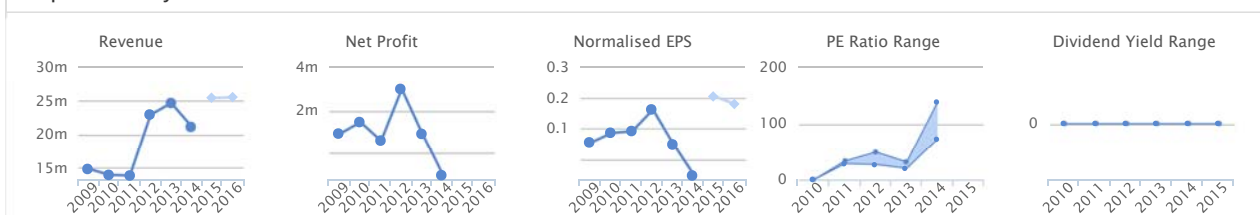
Other Ratios

Leverage (ttm)		total	ex intang
Gross Gearing	%	30.0	
Net Gearing	%	13.9	
Cash / Assets	%	10.4	
Liquidity (ttm)			Efficiency (ttm)
Curr. Ratio	1.28	Asset Turnover	0.39
Quick Ratio	1.28	Rec's Turnover	2.09
Interest Cov.	0.21	Stock Turnover	n/a

Recent History

		vs. industry	vs. market
Latest interim period (ended 31st Dec '14) vs. prior year			
Sales Growth	-14.9 %		
EPS Growth	n/a %		
3yr Compound Annual Growth Rate			
Sales Growth	15.1 %		
EPS Growth	n/a %		
DPS Growth	n/a %		

Graphical History Current Fiscal Year 2015



Broker Forecasts

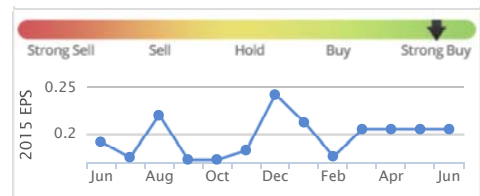
31st Dec 2015

31st Dec 2016

Broker Consensus Trend

2 Brokers

Price Target: \$7.18 (+132.91% above Price)	Net Profit	EPS	DPS	Net Profit	EPS	DPS
Est. Long Term Growth Rate: n/a	(\$)	(C)	(C)	(\$)	(C)	(C)
Consensus Estimate	-	0.21	-	-	0.18	-
1m Change	-	-	-	-	-	-
3m Change	-	-	-	-	-	-



Profile Summary



Escher Group Holdings Public Limited Company (Escher) is an Ireland-based provider of outsourced, point of sale software to the postal industry. The company is engaged in the provision of distributed messaging and data management solutions and services. It develops , markets, sells and support enterprise-wide software applications for post office counter automation and distributed network communication. It operates in two principal operating divisions: Retail Software and Interactive Services. Its Retail Division provides point of sale software. Escher's core technology, Riposte with RiposteEssential, together provide a retail management solution to organizations which are seeking to widen their service offering. Escher Interactive Services has developed a range of in-store engagement software in areas such as payment, loyalty and couponing. Escher Group (Irl) Limited, Escher Asia Pacific Pte, Escher Europe Limited are few of the company's subsidiaries.

Directors: [Liam Church \(CEO\)](#) , [Jonathan O'Connell \(CFO\)](#) , [Fionnuala Higgins \(MDR\)](#) , [Bernard Somers \(NEC\) 66](#) , [John Quinn \(NID\)](#) , [Michael Smurfit \(NID\)](#) , [Paul Taylor \(NID\) 49](#) ,

No. of Employees: 164

No. of Shareholders: n/a

Last Annual December 31st, 2014
Last Interim December 31st, 2014
Shares in Issue 18,689,070
Free Float 11.6m (62.1%)

Sector [Industrials](#)
Industry [Freight & Logistics Services](#)
Index [FTSE Intl-aim All Share](#) ,
Exchange [London Stock Exchange \(AIM\)](#)
Eligible for an ISA? a SIPP?



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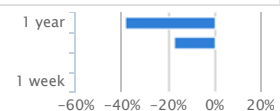
ESCHQuote

ESCH Share Price
 GBP
197.5p
Traded 10:39am · Minimum 15 min delayed · NMS: 0.500k

Day's Change
0.0 **0.0%**

Volume 0	Bid - Ask 190.0 - 205.0	Low - High 0.0 - 0.0	Spread 759bps
Avg Vol (3m) 1,250	Open - Close 197.5 - 197.5	12m Range 185.0 - 185.0	Beta 0.52

ESCH Share Price Performance



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 14th May [Escher secures contract with permanent t...](#)
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 29th Apr [Posting of Annual Report and Notice of A...](#)
 9th Mar [Final Results](#)

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