

Escher Group

ESCH 300p 0.0 0.0%

Market Cap
Enterprise Value
Revenue
Position in UK Edition

£55.5m
£56.5m
£14.5m
1081st

Value
Quality
Momentum
StockRank™

18
84
60
54

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



Momentum		
Relative Strength (%)		
1m	-9.3%	
3m	-17.4%	
1yr	+16.7%	
Volume Change (%)		
10d v 3m	-78.6%	
Price vs... (%)		
52w High	-24.7%	
50d MA	-12.1%	
200d MA	+1.30%	

Growth & Value			vs. industry	vs. market
12m Forecast Rolling				
PE Ratio (f)	20.5			
PEG Ratio (f)	0.71			
EPS Growth (f)	40.8 %			
Dividend Yield (f)	n/a %			
Valuation (ttm)				
Price to Book Value	2.55			
Price to Tang. Book	1,211			
Price to Free Cashflow	n/a			
Price to Sales	3.83			
EV to EBITDA	26.4			

Margin of Safety (beta)	
Broker Target	
Relative to Sector	
Graham Formula	
Stability Value (EPV)	

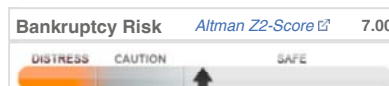
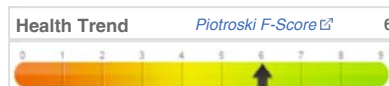
Screens Passed

ESCH doesn't qualify for our screens.

Find out why: [View Checklists](#)

Quality			vs. industry	vs. market
Return on Capital	4.52 %			
Return on Equity	2.55 %			
Operating Margin	8.30 %			

Financial Summary										
Balance Sheet · Income Statement · Cashflow										
Year End 31st Dec		2008	2009	2010	2011	2012	2013	2014E	2015E	CAGR / Avg
Revenue	\$m	17.5	14.9	14.0	13.9	23.0	24.7	29.4	26.6	+7.1%
Operating Profit	\$m	5.89	4.42	4.09	2.49	4.92	2.05			-19.0%
Net Profit	\$m	1.69	0.93	1.47	0.61	3.00	0.92	29.0	27.3	-11.5%
EPS Reported	\$	0.100	0.055	0.087	0.054	0.17	0.048			-13.6%
EPS Normalised	\$	0.100	0.055	0.087	0.092	0.17	0.048	0.32	0.18	-13.6%
EPS Growth	%		-45.1	+57.3	+6.6	+77.2	-70.6	+557.1	-44.5	
PE Ratio	x					105.8	16.1	29.0		
PEG	x					0.19	n/a	0.44		
Profitability										
Operating Margin	%	33.7	29.8	29.3	18.0	21.4	8.3			+23.4%
ROA	%		2.4	3.8	1.5	6.2	1.7			
ROCE	%	19.7	47.9	33.2	9.6	11.8	4.5			+21.1%
ROE	%		51.8	49.2	4.1	9.9	2.5			+23.5%
Cashflow										
Op. Cashflow ps	\$	0.20	0.023	0.20	0.17	0.23	0.17			-3.4%
Capex ps	\$	0.005	0.011	0.073	0.24	0.19	0.17			+105.8%
Free Cashflow ps	\$	0.19	0.012	0.13	-0.070	0.042	-0.006			
Dividends										
Dividend ps	\$									
Dividend Growth	%									
Dividend Yield	%									
Dividend Cover	x									
Balance Sheet										
Cash etc	\$m	2.52	0.59	0.78	3.44	7.83	6.71			+21.6%
Working Capital	\$m	-2.61	-22.6	-20.5	-8.79	3.93	6.63			+6.8%
Net Fixed Assets	\$m	1.25	0.57	0.58	0.72	2.20	1.73			-42.0%
Net Debt	\$m	27.2	26.0	24.2	8.31	1.75	1.78			-46.0%
Book Value	\$m	1.62	1.96	4.00	25.7	35.1	37.1			+87.0%
Average Shares	m	17.0	17.0	17.0	11.3	18.4	19.2			+2.4%
Book Value ps	\$	0.096	0.12	0.24	1.51	1.88	1.99			+83.6%



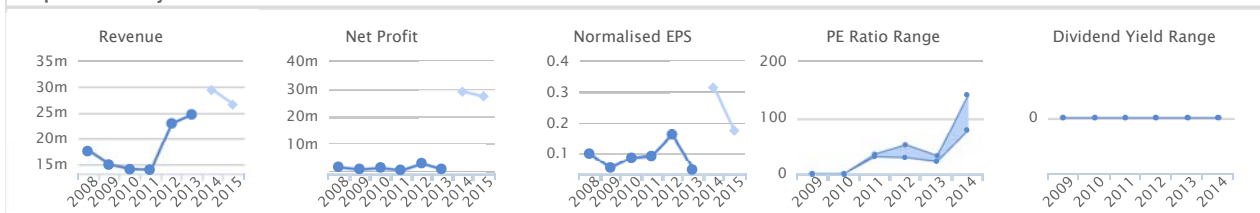
Earnings Manipulation Risk



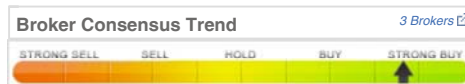
Other Ratios		
Leverage (ttm)	total	ex intang
Gross Gearing	% 22.9	10,891
Net Gearing	% 4.81	2,286
Cash / Assets	% 12.2	
Liquidity (ttm)		
Curr. Ratio	1.68	Asset Turnover
Quick Ratio	1.68	Rec's Turnover
Interest Cov.	3.60	Stock Turnover

Recent History			vs. industry	vs. market
Latest interim period (ended 31st Dec '13) vs. prior year				
Sales Growth	-17.1 %			
EPS Growth	-92.5 %			
3yr Compound Annual Growth Rate				
Sales Growth	21.0 %			
EPS Growth	-17.8 %			
DPS Growth	n/a %			

Graphical History Current Fiscal Year 2014



Broker Forecasts		31st Dec 2014	31st Dec 2015



Price Target: \$6.62 (+30.71% above Price)	Net Profit	EPS	DPS	Net Profit	EPS	DPS
Est. Long Term Growth Rate: n/a	(\$)	(\$)	(\$)	(\$)	(\$)	(\$)
Consensus Estimate	29.0m	0.32	-	27.3m	0.18	-
1m Change	-	-0.007	-	-	-0.017	-
3m Change	-	-0.007	-	-	-0.017	-



Profile Summary [Home Page](#) · [News Releases](#) · [Investor Relations](#) · [Financial Information](#) · [Corporate History/Profile](#) · [Executives](#) · [Products/Services](#)



Escher Group Holdings Public Limited Company (Escher) is engaged in the provision of distributed messaging and data management solutions and services. It develops markets and sells enterprise-wide software applications for post office counter automation and distributed network communication. It operates in two principal operating divisions: Retail Software Division and Message Based Communications Division. 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, expand customer reach, reduce costs and operational efficiencies. Its Message Based Division delivers RiposteTrEx, the only digital mailbox solution designed specifically to encourage citizens, businesses, governments and international agencies to collaborate securely online, on mobile devices and even through emerging social networking channels.

Directors: [Liam Church](#) (CEO) , [Jonathan O'Connell](#) (FID) 46, [Fionnuala Higgins](#) (EVP) , [Bernard Somers](#) (NEC) 64, [John Quinn](#) (NID) , [Michael Smurfit](#) (NID) 48, [Paul Taylor](#) (NID) 48,

No. of Employees: 166

No. of Shareholders: 0

Last Annual	December 31st, 2013	Sector	Industrials
Last Interim	December 31st, 2013	Industry	Freight & Logistics Services
Shares in Issue	18,654,893	Index	FTSE Aim All Share ,
ISIN	IE00B6SKRB38	Exchange	London Stock Exchange (AIM)
		Eligible for	an ISA? a SIPP?



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Auditors PricewaterhouseCoopers LLP

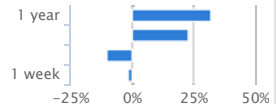
ESCH Quote

ESCH Share Price
GBp
300p
Traded 12:04pm · Minimum 15 min delayed · NMS: 0.500k

Day's Change
 0.0 **0.0%**

Volume	Bid - Ask	Low - High	Spread
0	285.0 - 310.0	0.0 - 0.0	833bps
Avg Vol (3m)	Open - Close	12m Range	Beta
9,075	297.5 - 297.5	0.0 - 0.0	0.00

ESCH Share Price Performance



Latest ESCH News Announcements (delayed) [More »](#)

10th Jun	Escher secures new Gibraltar contract
9th Jun	Escher update on customer rollout
28th May	Result of AGM
22nd Apr	Posting of Annual Report and Notice of AGM
9th Apr	Blocklisting Interim Review
24th Mar	Notification of Major Interest in Shares

Upcoming ESCH Events

No upcoming events.

Industry Peer Group	
	Yang Ming Marine T... Compare vs ESCH
	Interbulk Compare vs ESCH
	Goldenport Holding... Compare vs ESCH
	Escher Group Compare vs ESCH
	Braemar Shipping S... Compare vs ESCH
	Wincanton Compare vs ESCH
	DX (Group) Compare vs ESCH
	UK Mail Compare vs ESCH
Industrials Freight & Logistics Services	

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