



ShareSoc

UK Individual Shareholders Society

PO Box 62, Chislehurst, BR7 5YB

Phone: 020-8467-2686

Email: info@sharesoc.org

Web: www.sharesoc.org

SHARESOC GROWTH COMPANY SEMINAR

STOCKOPEDIA FINANCIAL ANALYSIS REPORTS ON PRESENTING COMPANIES

(Don't forget ShareSoc subscribing members can get a discount off the Stockopedia service).

Important Note: These reports do not necessarily reflect the latest changes in the financial position of the companies, for example any recent fund raisings, but are primarily based on the last annual financial statements and future forecasts.

Copies of the Powerpoint presentations given by presenters at these seminars are normally added to the ShareSoc Members Network (<http://sharesoc.ning.com>) in a Forum entitled "ShareSoc Growth Company Seminar Reports" soon after the Seminar. Use the site search facility at top right to locate those for a particular company if you cannot find the Forum.

Use the page below and overleaf to take notes on the presentations.

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IS Solutions

ISL  52p  0.0 0.0%

Market Cap	£18.4m	Value	36
Enterprise Value	£18.6m	Quality	40
Revenue	£10.4m	Momentum	42 
Position in UK Edition	1276th	StockRank™	32



Momentum

Relative Strength (%)	
1m	-10.6% 
3m	-2.2% 
1yr	-6.6% 
Volume Change (%)	
10d v 3m	-80.8% 
Price vs... (%)	
52w High	-13.3% 
50d MA	-6.64% 
200d MA	-1.91% 

Growth & Value

12m Forecast Rolling		vs. industry	vs. market
PE Ratio (f)	12.0		
PEG Ratio (f)	0.78		
EPS Growth (f)	18.4 %		
Dividend Yield (f)	2.93 %		
Valuation (ttm)			
Price to Book Value	3.15		
Price to Tang. Book	3.83		
Price to Free Cashflow	57.9		
Price to Sales	1.77		
EV to EBITDA	15.7		

Margin of Safety (beta)

Broker Target	54%
Relative to Sector	-4% 
Graham Formula	5% 
Stability Value (EPV)	65% 

Screens Passed

ISL doesn't qualify for our  screens.
Find out why: [View Checklists](#)

Quality

		vs. industry	vs. market
Return on Capital	16.0 %		
Return on Equity	14.3 %		
Operating Margin	9.68 %		

Financial Summary

Balance Sheet · Income Statement · Cashflow

Year End 31st Dec		2010	2011	2012	2013	2014	2015	2016E	2017E	CAGR / Avg
Revenue	£m	9.78	11.0	9.06	9.21	9.77	10.4	14.4	15.0	+1.1%
Operating Profit	£m	0.63	0.72	0.90	0.79	0.96	1.00			+10.0%
Net Profit	£m	0.62	0.77	0.73	0.80	0.81	0.54			+8.5%
EPS Reported	p	2.46	3.03	2.88	3.08	3.12	1.92			+7.0%
EPS Normalised	p	2.21	2.42	3.22	3.24	3.10	3.12	4.11	4.50	+7.1%
EPS Growth	%	+15.1	+9.3	+33.2	+0.7	-4.3	+0.7	+31.6	+9.62	
PE Ratio	x						16.7	12.7	11.6	
PEG	x						0.53	1.32	n/a	

Profitability

Operating Margin	%	6.3	6.5	9.9	8.6	9.8	9.7			+8.5%
ROA	%		8.7	10.4	9.6	10.4	8.7			
ROCE	%	12.5	13.9	16.2	13.6	16.1	16.0			+14.7%
ROE	%		16.6	18.4	15.8	15.4	14.3			+16.1%

Cashflow

Op. Cashflow ps	p	3.19	2.42	4.55	1.11	2.92	1.68			-12.0%
Capex ps	p	9.40	0.47	0.89	0.39	0.45	0.46			-45.5%
Free Cashflow ps	p	-6.21	1.95	3.66	0.73	2.47	1.23			

Dividends

Last ex-div: 16th Jul, paid: 13th Aug [more...](#)

Dividend ps	p	1.10	1.15	1.30	1.44	1.60		1.21	1.80	-100.0%
Dividend Growth	%	+10.00	+4.55	+13.0	+10.8	+11.1	-100.0		+48.8	
Dividend Yield	%							2.33	3.46	
Dividend Cover	x	2.02	2.14	2.33	2.00	1.93		3.39	2.50	

Balance Sheet

Cash etc	£m	1.24	1.12	1.06	0.64	0.54	0.32			-23.9%
Working Capital	£m	1.41	1.47	1.27	1.55	1.69	2.05			+7.8%
Net Fixed Assets	£m	2.37	2.57	3.14	3.18	3.22	3.17			+6.0%
Net Debt	£m	0.31	0.30	0.21	0.49	0.17	0.28			
Book Value	£m	3.54	3.89	4.42	4.85	5.43	5.83			+10.5%
Average Shares	m	25.2	25.2	25.4	25.7	25.7	27.7			+1.4%
Book Value ps	p	14.3	15.7	17.7	19.3	21.3	23.0			+10.0%

Health Trend

Piotroski F-Score  4

Bankruptcy Risk

Altman Z2-Score  6.87

Earnings Manipulation Risk

 High

Magic Formula Score

1125 65% B-



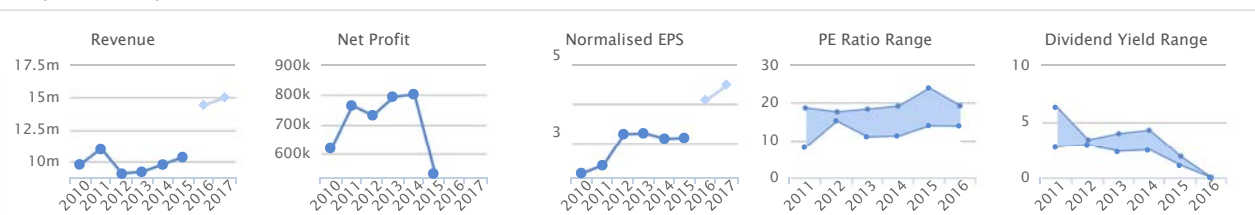
Other Ratios

Leverage (ttm)		total	ex intang
Gross Gearing	%	10.2	12.4 
Net Gearing	%	4.72	5.74 
Cash / Assets	%	2.97	
Liquidity (ttm)			
Curr. Ratio	1.46 	Asset Turnover	1.21
Quick Ratio	1.46 	Rec's Turnover	2.52
Interest Cov.	41.8 	Stock Turnover	n/a

Recent History

		vs. industry	vs. market
Latest interim period (ended 31st Dec '14) vs. prior year			
Sales Growth	44.0	% 	
EPS Growth	136.3	% 	
3yr Compound Annual Growth Rate			
Sales Growth	4.54	% 	
EPS Growth	-1.03	% 	
DPS Growth	-100.0	% 	

Graphical History Current Fiscal Year 2016



Broker Forecasts

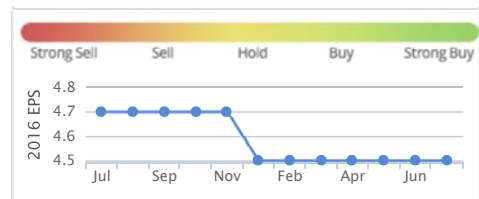
31st Dec 2016

31st Dec 2017

Broker Consensus Trend



Price Target: 0.80 (+53.81% above Price)	Net Profit	EPS	DPS	Net Profit	EPS	DPS
Est. Long Term Growth Rate: n/a	(£)	(p)	(p)	(£)	(p)	(p)
Consensus Estimate	-	4.50	1.80	-	-	-
1m Change	-	-	-	-	-	-
3m Change	-	-	-	-	-	-



Profile Summary



IS Solutions PLC, is a United Kingdom-based company that is involved in hardware sales and facilities management. In 1989, the Company expanded with the creation of a software development division, and moved into application development, followed by entry into the Internet market. The Company has acquired a team of graphic designers from Visual Assets to provide user interface, information architecture and marketing services; data feeds provider AXL Performance Solutions for content delivery services and application development skills; support firm Candric for delivery of IT services; content management consultancy Chapter26 to reinforce web and enterprise content management capabilities. The Company has also achieved ISO27001 accreditation. It also has partnerships with Adobe, CallMiner, EMC, EPiServer, IBM, Microsoft, Oracle, SAS, Celebris Technologies and WebTrends.

Directors: John Lythall (CEO), Jim Dodkins (EDR), Peter Kear (EDR), Michael Tinling (SEC), Barrie Clark (NEC) 61, Peter Simmonds (NVC) 56, Peter English (NID), Roger McDowell (NID) 59.

No. of Employees: 98

No. of Shareholders: n/a

Last Annual December 31st, 2014
Last Interim December 31st, 2014

Incorporated March 6, 1985
Public Since September 2, 1997

Shares in Issue 35,325,912
Free Float 17.3m (48.9%)

Sector Consumer Cyclical
Industry Specialty Retailers
Index FTSE Intl-aim All Share ,
Exchange London Stock Exchange (AIM)
Eligible for an ISA? ☒ a SIPP? ☒



Address Windmill House 91-93 Windmill Road,
SUNBURY ON THAMES, TW16 7EF,
United Kingdom

Web <http://www.issolutions.co.uk/>

Phone +44 1932 893333

Contact ()

Auditors Baker Tilly UK Audit LLP

ISLQuote

ISL Share Price GBp **Day's Change**
52p **0.0 0.0%**
Traded 1:39pm · Minimum 15 min delayed · NMS: 1.50k

Volume

0

Avg Vol (3m)
26,333

Bid - Ask

50.0 - 54.0

Open - Close
52.0 - 52.0

Low - High

0.0 - 0.0

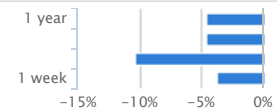
12m Range
0.0 - 0.0

Spread

769bps

Beta
0.23

ISL Share Price Performance



Latest ISL News Announcements (delayed)

[More »](#)

29th Jun Preliminary results - 15 months ended 31...

17th Jun Holding(s) in Company

29th Apr Director dealings

20th Apr Exercise of options

14th Apr Appointment of Director

Upcoming ISL Events

Thursday 16th July, 2015
Dividend For ISL.L

Recent ↓

Industry Peer Group



Northamber

[Compare vs ISL](#)



Acal

[Compare vs ISL](#)



Dixons Carphone

[Compare vs ISL](#)



IS Solutions

[Compare vs ISL](#)

[Consumer Cyclical](#)

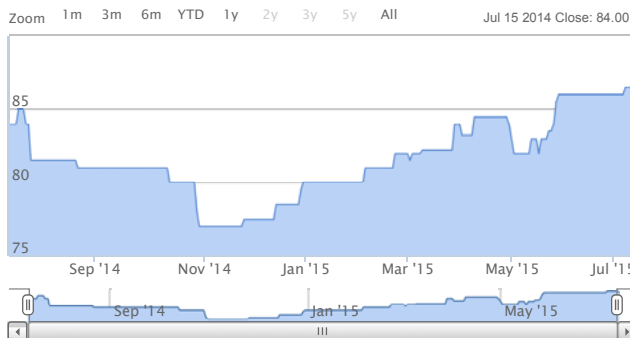
[Specialty Retailers](#)

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Abzena

ABZA  86p ▼ -0.5 -0.6%

Market Cap	£84.3m	Value	10
Enterprise Value	£68.5m	Quality	35
Revenue	£5.67m	Momentum	75
Position in UK Edition	902nd	StockRank™	32

**Momentum**

Relative Strength (%)	
1m	+0.3%
3m	+6.9%
1yr	+0.9%
Volume Change (%)	
10d v 3m	+677%
Price vs... (%)	
52w High	-0.6%
50d MA	+1.88%
200d MA	+6.05%

Growth & Value

12m Forecast Rolling		vs. industry	vs. market
PE Ratio (f)	n/a		
PEG Ratio (f)	n/a		
EPS Growth (f)	n/a %		
Dividend Yield (f)	n/a %		
Valuation (ttm)			
Price to Book Value	3.03		
Price to Tang. Book	4.46		
Price to Free Cashflow	n/a		
Price to Sales	14.9		
EV to EBITDA	n/a		

Margin of Safety (beta)

Broker Target	12%
Relative to Sector	

Screens Passed 1 / 1

ABZA qualifies for **52 Week High Momentum Screen (in Momentum Investing)**.

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

Quality

		vs. industry	vs. market
Return on Capital	-18.3 %		
Return on Equity	-22.8 %		
Operating Margin	-93.5 %		

Financial Summary

Balance Sheet · Income Statement · Cashflow

Year End 31st Mar		2010	2011	2012	2013	2014	2015	2016E	2017E	CAGR / Avg
Revenue	£m	0.000	0.000	1.52	3.90	3.78	5.67	6.48	8.30	+55.2%
Operating Profit	£m	0.000	0.000	-1.29	-0.46	-4.45	-5.30			
Net Profit	£m	0.000	0.000	-1.07	-0.16	-3.90	-4.72	-1.07	-2.95	
EPS Reported	p	0.000	0.000	-1.10	-0.17	-4.01	-6.59			
EPS Normalised	p	0.000	0.000	-1.07	-0.17	-3.73	-6.59	-4.63	-3.00	
EPS Growth	%									
PE Ratio	x						n/a	n/a	n/a	
PEG	x						n/a	n/a	n/a	

Profitability

Operating Margin	%			-85.2	-11.7	-117.8	-93.5			-77.0%
ROA	%			-43.7	-3.2	-37.2				
ROCE	%			-29.7	-10.4	-30.2	-18.3			-22.2%
ROE	%			-50.9	-3.7	-43.8	-22.8			-30.3%

Cashflow

Op. Cashflow ps	p	0.000	0.000	-1.46	0.63	-4.52	-6.97			
Capex ps	p	0.000	0.000	0.24	0.29	0.15	1.51			+85.4%
Free Cashflow ps	p	0.000	0.000	-1.69	0.35	-4.67	-8.48			

Dividends

Dividend ps	p									
Dividend Growth	%									
Dividend Yield	%									
Dividend Cover	x									

Balance Sheet

Cash etc	£m	0.000	0.000	2.41	2.75	2.76	15.8			+87.2%
Working Capital	£m	n/a	n/a	2.84	2.83	4.58	18.6			+87.1%
Net Fixed Assets	£m	0.000	0.000	0.34	0.48	0.70	1.49			+63.6%
Net Debt	£m	0.000	0.000	-2.41	-2.75	-2.76	-15.8			
Book Value	£m	0.000	0.000	4.20	4.27	13.5	27.8			+87.9%
Average Shares	m	0.000	0.000	97.4	97.4	97.4	71.6			-9.8%
Book Value ps	p	0.000	0.000	4.31	4.38	13.9	28.6			+87.9%

Health TrendPiotroski F-Score  4**Bankruptcy Risk**Altman Z2-Score  28.9**Earnings Manipulation Risk**

Low

Magic Formula Score

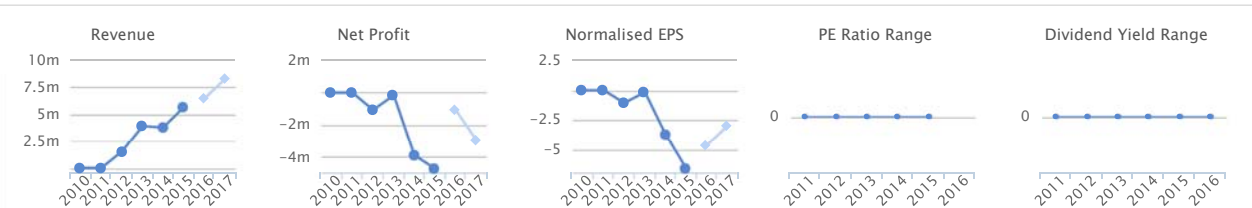
2524 21% D-

**Other Ratios**

Leverage (ttm)		total	ex intang	
Gross Gearing	%	0.000	0.000	
Net Gearing	%	-56.7	-83.6	●
Cash / Assets	%	50.4		●
Liquidity (ttm)		Efficiency (ttm)		
Curr. Ratio	8.89	●	Asset Turnover	0.18
Quick Ratio	8.54	●	Rec's Turnover	2.09
Interest Cov.	100.0	●	Stock Turnover	4.55

Recent History

		vs. industry	vs. market
Latest interim period (ended 31st Mar '15) vs. prior year			
Sales Growth	7.64 %		
EPS Growth	n/a %		
3yr Compound Annual Growth Rate			
Sales Growth	55.2 %		
EPS Growth	n/a %		
DPS Growth	n/a %		

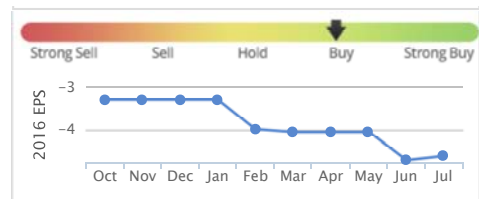
Graphical History Current Fiscal Year 2016**Broker Forecasts**

31st Mar 2016

31st Mar 2017

Broker Consensus Trend3 Brokers 

Price Target: 0.97 (+11.61% above Price)	Net Profit	EPS	DPS	Net Profit	EPS	DPS
Est. Long Term Growth Rate: n/a	(£)	(p)	(p)	(£)	(p)	(p)
Consensus Estimate	-1.07m	-4.63	-	-2.95m	-3.00	-
1m Change	+88.0k	+0.10	-	+5.40k	+0.034	-
3m Change	+2.88m	-0.57	-	+5.40k	+0.034	-



Profile Summary

 Abzena plc is a life sciences company providing services and technologies. The Company is engaged in the provision of services and technology licenses. The Company consists of PolyTherics and Antitope, which have established a suite of services and technologies that are designed to improve the chances of development of antibodies and proteins with therapeutic benefits. Antitope provides immunogenicity assessment, protein engineering and manufacturing cell line development. The Company's protein engineering technologies, Composite Human Antibodies and Composite Proteins, are used to create products with less risk of producing an unwanted immune response in patients. PolyTherics specializes in site-specific bioconjugation of drugs to therapeutic antibodies and other targeting proteins, which deliver the drug to specific cells, including cancer cells.

No Management Information.

No. of Employees: 91

No. of Shareholders: n/a

Last Annual	March 31st, 2015	Sector	Healthcare
Last Interim	March 31st, 2015	Industry	Biotechnology & Medical Research
Incorporated	March 25, 2014	Index	
Public Since	July 10, 2014	Exchange	London Stock Exchange (AIM)
Shares in Issue	97,468,858	Eligible for	an ISA?  a SIPP? 
Free Float	58.0m (58.5%)		



Address Babraham Hall Babraham Research Campus, CAMBRIDGE, CB22 3AT, United Kingdom
Web <http://www.antitope.com>
Phone +44 1223 496190
Contact ()
Auditors James Cowper Kreston

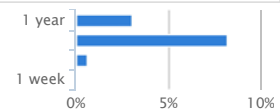
ABZAQuote

ABZA Share Price
GBp
86p
Traded 11:14am · Minimum 15 min delayed · NMS: 3.00k

Day's Change
▼ **-0.5 -0.6%**

Volume	Bid - Ask	Low - High	Spread
17,795	86.0 - 87.0	0.0 - 0.0	116bps
Avg Vol (3m)	Open - Close	12m Range	Beta
131,832	86.5 - 86.5	83.0 - 83.0	0.00

ABZA Share Price Performance



Latest ABZA News Announcements (delayed)

[More »](#)

7th Jul	Block Admission
15th Jun	Annual Financial Report
8th Jun	Results for the year ended 31 March 2015
1st Jun	Notice of Results
19th May	Collaboration

Upcoming ABZA Events

Recent ↓

Industry Peer Group

	Midatech Pharma Compare vs ABZA
	Summit Therapeutic... Compare vs ABZA
	E-Therapeutics Compare vs ABZA
	ReNeuron Compare vs ABZA
	Oxford Pharmascien... Compare vs ABZA
	Tissue Regenera Compare vs ABZA
	Horizon Discovery Compare vs ABZA
	Silence Therapeuti... Compare vs ABZA

[Healthcare](#) [Biotechnology & Medical Research](#)

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Idox

IDOX  38.5p  0.0 0.0%

Market Cap	£136.9m	Value	34
Enterprise Value	£146.7m	Quality	79
Revenue	£60.6m	Momentum	75
Position in UK Edition	800th	StockRank™	70

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



Momentum

Relative Strength (%)	
1m	+2.4%
3m	+0.9%
1yr	-11.0%
Volume Change (%)	
10d v 3m	-5.62%
Price vs... (%)	
52w High	-17.6%
50d MA	+0.60%
200d MA	-1.47%

Growth & Value

12m Forecast Rolling		
PE Ratio (f)	10.9	
PEG Ratio (f)	0.54	
EPS Growth (f)	25.5 %	
Dividend Yield (f)	2.08 %	
Valuation (ttm)		
Price to Book Value	2.80	
Price to Tang. Book	n/a	
Price to Free Cashflow	25.5	
Price to Sales	2.26	
EV to EBITDA	10.4	

Margin of Safety (beta)

Broker Target	4%
Relative to Sector	5%
Graham Formula	25%
Stability Value (EPV)	38%

Screens Passed 1

IDOX qualifies for **Josef Lakonishok Momentum Screen (in Momentum Investing)**.

Quality

Return on Capital	11.2 %	
Return on Equity	11.5 %	
Operating Margin	12.3 %	

Financial Summary

Balance Sheet · Income Statement · Cashflow

Year End 31st Oct		2009	2010	2011	2012	2013	2014	TTM	2015E	2016E	CAGR / Avg
Revenue	£m	32.2	31.3	38.6	55.4	57.3	60.7	60.6	64.9	67.5	+13.5%
Operating Profit	£m	4.94	5.24	5.77	9.20	8.58	8.49	7.47			+11.5%
Net Profit	£m	3.46	3.64	4.53	6.71	7.52	5.84	5.51	12.5	13.8	+11.1%
EPS Reported	p	1.00	1.05	1.28	2.12	2.30	1.59	1.47			+9.7%
EPS Normalised	p	1.21	1.12	1.28	2.53	2.28	1.69	1.68	3.28	3.62	+6.9%
EPS Growth	%	-12.0	-7.3	+13.9	+97.4	-9.8	-25.7	-35.2	+93.4	+10.5	
PE Ratio	x						22.7	23.0	11.8	10.6	
PEG	x						0.25	0.25	1.12	1.01	
Profitability											
Operating Margin	%	15.3	16.8	14.9	16.6	15.0	14.0	12.3			+15.4%
ROA	%		7.2	8.0	10.1	8.8	6.1	5.18			+13.6%
ROCE	%	14.3	14.0	14.6	13.5	12.4	12.7	11.2			+16.0%
ROE	%		12.3	13.8	21.1	20.0	12.5	11.5			
Cashflow											
Op. Cashflow ps	p	1.54	2.22	1.25	2.67	2.71	3.12	2.11			+15.2%
Capex ps	p	0.31	1.18	0.35	0.49	0.68	0.70	0.60			+17.8%
Free Cashflow ps	p	1.24	1.04	0.90	2.18	2.03	2.43	1.52			+14.5%
Dividends											
Last ex-div: 1st Oct, paid: 14th Oct more...											
Dividend ps	p	0.20	0.45	0.60	0.68	0.70	0.75	0.75	0.78	0.81	+30.3%
Dividend Growth	%	+73.9	+125	+33.3	+12.5	+3.70	+7.14	+3.45	+3.33	+4.52	
Dividend Yield	%						1.95	1.95	2.01	2.10	
Dividend Cover	x	4.99	2.33	2.14	3.14	3.29	2.11	1.96	4.23	4.47	
Balance Sheet											
Cash etc	£m	6.95	2.00	0.000	3.64	3.40	5.86	9.01			-3.4%
Working Capital	£m	0.78	-8.84	-10.3	-7.59	-5.55	-5.15	-3.19			+37.6%
Net Fixed Assets	£m	1.07	1.64	1.10	4.10	5.08	5.28	4.68			
Net Debt	£m	-3.17	0.87	2.41	21.5	19.8	15.8	9.72			+11.5%
Book Value	£m	28.2	31.0	34.4	38.9	44.7	48.6	48.8			+1.2%
Average Shares	m	346.6	346.8	353.4	365.1	363.3	368.5	353.3			+10.7%
Book Value ps	p	8.19	9.11	9.95	11.2	12.8	13.6	13.7			

Health Trend

Piotroski F-Score  6

Bankruptcy Risk

Altman Z2-Score  3.94

Earnings Manipulation Risk

Low

Magic Formula Score

714 78% B+



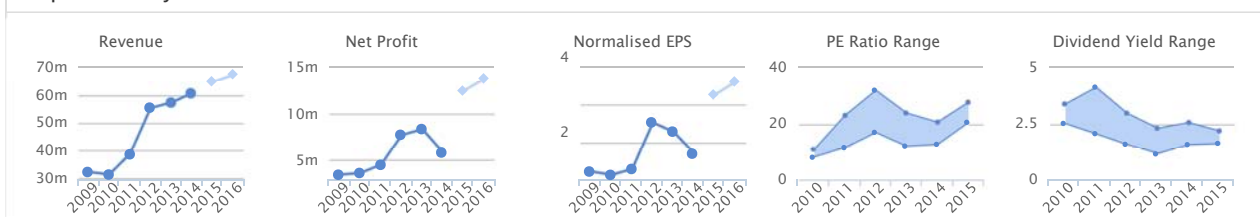
Other Ratios

Leverage (ttm)		total	ex intang
Gross Gearing	%	38.3	
Net Gearing	%	19.9	
Cash / Assets	%	8.66	
Liquidity (ttm)			Efficiency (ttm)
Curr. Ratio	0.92	Asset Turnover	0.61
Quick Ratio	0.92	Rec's Turnover	2.49
Interest Cov.	27.7	Stock Turnover	n/a

Recent History

Latest interim period (ended 30th Apr '15) vs. prior year		
Sales Growth	-0.18 %	
EPS Growth	-1.62 %	
3yr Compound Annual Growth Rate		
Sales Growth	16.3 %	
EPS Growth	9.80 %	
DPS Growth	7.72 %	

Graphical History Current Fiscal Year 2015



Broker Forecasts

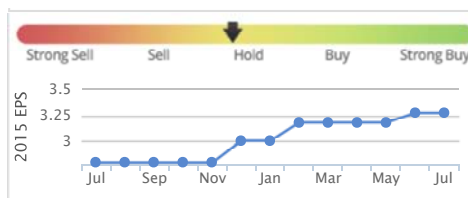
31st Oct 2015

31st Oct 2016

Broker Consensus Trend

2 Brokers 

Price Target: 0.40 (+3.91% above Price)	Net Profit	EPS	DPS	Net Profit	EPS	DPS
Est. Long Term Growth Rate: n/a	(£)	(p)	(p)	(£)	(p)	(p)
Consensus Estimate	12.5m	3.28	0.78	13.8m	3.62	0.81
1m Change	-	-	-	-	-	-
3m Change	-	+0.093	-0.037	-100.0k	+0.11	-0.042



Profile Summary



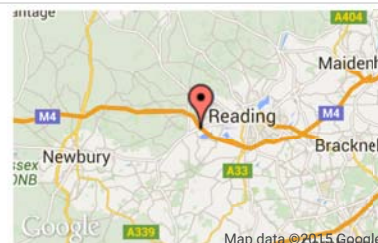
IDOX plc is a United Kingdom-based company that supplies information management solutions and services to the UK public sector, as well as asset-intensive corporate industries around the world. The Company operates in two divisions: Public Sector Software (PSS) and Engineering Information Management (EIM). The PSS division provides specialist document management software and related services to approximately 90% of the United Kingdom local authorities in the fields of land and property management, regulatory services, waste management, social care and finance. The PSS division also runs the grants information provider in both the United Kingdom and the Netherlands, and provides solutions for government elections and European wide compliance and e-learning. The EIM division is represented by McLaren Software. McLaren provides information management solutions for major capital projects and asset operations, as well as infrastructure projects and facilities management.

Directors: Martin Brooks (CHM) 64, Richard Kellett-Clarke (CEO) 60, Jane Mackie (CFO) 34, Wendy Hall (NED) 62, Peter Lilley (NID) 71, Jeremy Millard (NID) 43,

No. of Employees: 554

No. of Shareholders: n/a

Last Annual	October 31st, 2014	Sector	Technology
Last Interim	April 30th, 2015	Industry	Software & IT Services
Incorporated	April 26, 2000	Index	FTSE Intl-aim All Share
Public Since	August 20, 2001	Exchange	London Stock Exchange (AIM)
Shares in Issue	355,678,396	Eligible for	an ISA? ☒ a SIPP? ☒
Free Float	324.9m (91.3%)		



Address Arlington Business Park/, READING, RG7 4SA, United Kingdom
Web <http://www.idoxgroup.com>
Phone + 870 3337101
Contact ()
Auditors Grant Thornton UK LLP

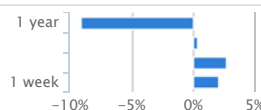
IDOXQuote

IDOX Share Price
 GBp
38.5p
 Traded 3:46pm · Minimum 15 min delayed · NMS: 10.00k

Day's Change
 ▲ 0.0 0.0%

Volume	Bid - Ask	Low - High	Spread
69,458	38.0 - 39.0	0.0 - 0.0	260bps
Avg Vol (3m)	Open - Close	12m Range	Beta
294,201	38.5 - 38.5	35.0 - 39.3	0.20

IDOX Share Price Performance



Latest IDOX News Announcements (delayed)

[More »](#)

7th Jul	Acquisition
25th Jun	Holding(s) in Company
8th Jun	Half Yearly Report
3rd Jun	Holding(s) in Company
19th May	Trading Statement

Upcoming IDOX Events

Thursday 1st October, 2015
 Dividend For IDOX.L

Recent ↓

Industry Peer Group

	Keywords Studios Compare vs IDOX
	Ideagen Compare vs IDOX
	Brady Compare vs IDOX
	dotDigital Compare vs IDOX
	acesso Technology Compare vs IDOX
	Fusionex Internati... Compare vs IDOX
	Globo Compare vs IDOX
	GB Compare vs IDOX

[Technology](#)

[Software & IT Services](#)

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Arria NLG

NLG  22p ▲1.0 4.8%

Market Cap	£21.8m	Value	19
Enterprise Value	£22.0m	Quality	5
Revenue	£1.36m	Momentum	4
Position in UK Edition	1238th	StockRank™	1



Momentum

Relative Strength (%)	
1m	+28.8% ●
3m	-24.4% ●
1yr	-62.9% ●
Volume Change (%)	
10d v 3m	+18.7% ●
Price vs... (%)	
52w High	-63.1% ●
50d MA	+53.5% ●
200d MA	-31.4% ●

Growth & Value

12m Forecast Rolling		vs. industry	vs. market
PE Ratio (f)	n/a		
PEG Ratio (f)	n/a		
EPS Growth (f)	n/a %		
Dividend Yield (f)	n/a %		
Valuation (ttm)			
Price to Book Value	1.02		
Price to Tang. Book	n/a		
Price to Free Cashflow	n/a		
Price to Sales	16.0		
EV to EBITDA	n/a		

Margin of Safety (beta)

Relative to Sector  39%

Screens Passed

NLG doesn't qualify for our  screens.
Find out why: [View Checklists](#)

Quality

		vs. industry	vs. market
Return on Capital	-35.8 %		
Return on Equity	-31.7 %		
Operating Margin	-607 %		

Financial Summary

Balance Sheet · Income Statement · Cashflow

Year End 30th Sep		2009	2010	2011	2012	2013	2014	TTM	2015E	2016E	CAGR / Avg
Revenue	£m	0.000	0.000	0.000	0.063	0.82	0.79	1.36	2.11	5.30	+254.7%
Operating Profit	£m	0.000	0.000	0.000	-6.51	-13.0	-10.9	-8.26			
Net Profit	£m	0.000	0.000	0.000	-5.22	-10.7	-10.6	-7.95	-7.49	-5.77	
EPS Reported	p	0.000	0.000	0.000	-5.10	-10.5	-10.7	-7.92			
EPS Normalised	p	0.000	0.000	0.000	-4.16	-10.5	-9.61	-6.84	-6.14	-4.56	
EPS Growth	%										
PE Ratio	x						n/a	n/a	n/a	n/a	
PEG	x						n/a	n/a	n/a	n/a	
Profitability											
Operating Margin	%				-10,412	-1,592	-1,390	-607			-4,465%
ROA	%				-25.5	-28.5		-27.3			
ROCE	%				-17.0	-41.2	-43.0	-35.8			-33.7%
ROE	%				-110	-149.2	-74.7	-31.7			-111.3%
Cashflow											
Op. Cashflow ps	p	0.000	0.000	0.000	-2.42	-8.34	-7.07	-4.74			+9.4%
Capex ps	p	0.000	0.000	0.000	0.093	0.78	0.12	0.049			
Free Cashflow ps	p	0.000	0.000	0.000	-2.51	-9.12	-7.18	-4.79			
Dividends											
Dividend ps	p										
Dividend Growth	%										
Dividend Yield	%										
Dividend Cover	x										
Balance Sheet											
Cash etc	£m	0.000	0.000	0.000	8.87	4.59	1.74	1.02			-55.7%
Working Capital	£m	n/a	n/a	n/a	6.72	2.28	0.53	-1.04			-71.9%
Net Fixed Assets	£m	0.000	0.000	0.000	0.27	0.42	0.38	0.34			+18.8%
Net Debt	£m	0.000	0.000	0.000	-8.53	-4.24	-1.74	0.24			
Book Value	£m	0.000	0.000	0.000	9.49	4.92	23.5	21.3			+57.3%
Average Shares	m	0.000	0.000	0.000	102.3	102.3	99.2	101.1			-1.5%
Book Value ps	p	0.000	0.000	0.000	9.27	4.81	22.9	20.5			+57.1%

Health Trend

Piotroski F-Score  4

Bankruptcy Risk

Altman Z2-Score  4.44

Earnings Manipulation Risk

High

Magic Formula Score

2954 8% E-



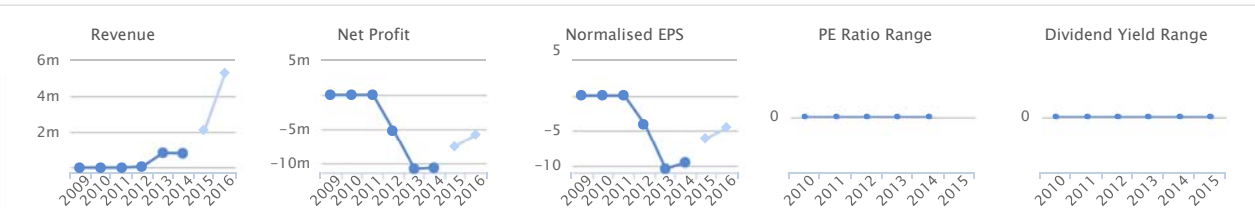
Other Ratios

Leverage (ttm)		total	ex intang
Gross Gearing	%	5.89	
Net Gearing	%	1.12	
Cash / Assets	%	3.93	
Liquidity (ttm)		Efficiency (ttm)	
Curr. Ratio	0.63	Asset Turnover	0.052
Quick Ratio	0.63	Rec's Turnover	2.76
Interest Cov.	-375.5	Stock Turnover	n/a

Recent History

		vs. industry	vs. market
Latest interim period (ended 31st Mar '15) vs. prior year			
Sales Growth	173.9 %		
EPS Growth	n/a %		
3yr Compound Annual Growth Rate			
Sales Growth	n/a %		
EPS Growth	n/a %		
DPS Growth	n/a %		

Graphical History Current Fiscal Year 2015



Broker Forecasts

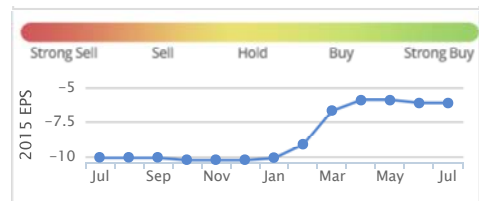
30th Sep 2015

30th Sep 2016

Broker Consensus Trend

 2 Brokers

Price Target: N/A	Net Profit	EPS	DPS	Net Profit	EPS	DPS
Est. Long Term Growth Rate: n/a	(£)	(p)	(p)	(£)	(p)	(p)
Consensus Estimate	-7.49m	-6.14	-	-5.77m	-4.56	-
1m Change	-	-	-	-	-	-
3m Change	-	-0.22	-	-	+0.15	-



Profile Summary



Arria NLG plc is a software development company. The Company is engaged in the development and deployment of industrial, enterprise level natural language generation (NLG) software technologies. The Company's core product is known as the Arria NLG Engine. The Arria NLG Engine is a form of artificial intelligence, specialized in communicating information, which is extracted from complex data sources in natural language. The Arria NLG Engine comprises of two main elements: an analytics component that is programmed to embody the knowledge of the domain in which it operates, and a natural language generation component, which embodies the skill required to communicate information articulately using natural language.

Directors: [Stuart Rogers \(CHM\) 57](#), [Wayne Thornhill \(CFO\) 48](#), [Robert Dale \(CTO\)](#), [Sharon Kay Daniels \(CMO\) 52](#), [Matthew Gould \(OTH\)](#), [Ehud Reiter \(OTH\)](#), [Somayajulu Sripada \(OTH\)](#), [Thomas Howard Makeig \(SEC\)](#), [Simon Small \(DRC\) 43](#), [Michael Higgins \(NID\) 57](#), [Paul Kidney \(NID\) 55](#),

No. of Employees: 41

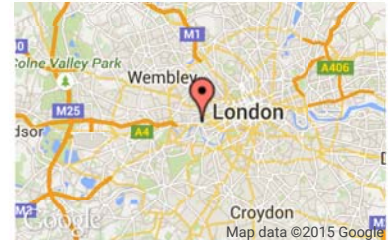
No. of Shareholders: n/a

Last Annual September 30th, 2014
Last Interim March 31st, 2015

Incorporated October 17, 2011
Public Since December 5, 2013

Shares in Issue 103,729,210
Free Float 2.11m (2.0%)

Sector [Technology](#)
Industry [Software & IT Services](#)
Index
Exchange London Stock Exchange (AIM)
Eligible for an ISA? a SIPP?



Address [Space One1 Beadon Road](#)
[Hammersmith, LONDON, W6 0EA, United Kingdom](#)

Web <https://www.arria.com>

Phone +44 20 71004540

Contact [Thomas Howard Makeig \(Secretary, IR Contact Officer\)](#)

Auditors [PricewaterhouseCoopers LLP](#)

NLGQuote

NLG Share Price
GBp

22p

Traded 3:04pm - Minimum 15 min delayed - NMS: 5.00k

Day's Change

▲ 1.0 4.8%

Volume
18,000

Avlg Vol (3m)
321,768

Bid - Ask
20.0 - 22.0

Open - Close
21.0 - 21.0

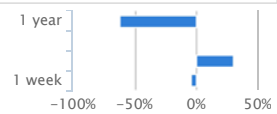
Low - High
0.0 - 0.0

12m Range
6.3 - 34.0

Spread
909bps

Beta
0.00

NLG Share Price Performance



Latest NLG News Announcements (delayed)

[More »](#)

30th Jun [Correction:](#)

30th Jun [Correction: Interim Results](#)

30th Jun [Interim Results](#)

29th Jun [News](#)

24th Jun [Funding update](#)

Upcoming NLG Events

Recent ↓

Industry Peer Group

IdeaGen
[Compare vs NLG](#)

Brady
[Compare vs NLG](#)

dotDigital
[Compare vs NLG](#)

accesso Technology
[Compare vs NLG](#)

Idox
[Compare vs NLG](#)

Fusionex Internati...

Globo
[Compare vs NLG](#)

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[Compare vs NLG](#)

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