



ShareSoc

UK Individual Shareholders Society

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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 our website, here: <https://www.sharesoc.org/seminar/> soon after the Seminar, and are available to logged in full members of ShareSoc.

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

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Taseko Mines

TKO  140.51p ▼ -4.5 -3.1%

Highly Speculative, Mid Cap, Style Neutral

Market Cap

£396.7m

Quality

▼ 34

Enterprise Value

£594.9m

Value

▲ 45

Revenue

£213.8m

Momentum

▼ 90

Market Cap Rank

662nd / 1814

StockRank™

▼ 59

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



Momentum

Relative Strength (%)

1m -18.4% ●

3m +8.9% ●

1yr +226.7% ●

Volume Change (%)

10d v 3m +12.9% ●

Price vs... (%)

52w High -21.6% ●

50d MA -6.93% ●

200d MA +29.7% ●

Growth & Value

vs. industry vs. market

12m Forecast Rolling

PE Ratio (f) 24.4

PEG Ratio (f) n/a

EPS Growth (f) n/a %

Dividend Yield (f) n/a %

Valuation (ttm)

Price to Book Value 2.23

Price to Tang. Book 2.27

Price to Free Cashflow 25.6

Price to Sales 1.85

EV to EBITDA 8.72

Quality

vs. industry vs. market

Return on Capital 1.71 %

Return on Equity 4.94 %

Operating Margin 4.61 %

Margin of Safety (beta)

Broker Target 2

Relative to Sector -31%

Graham Formula -84%

Screens Passed 1 / 1

TKO qualifies for **Price Momentum Screen**
(in Momentum Investing).[View Screen](#) · [View Checklist](#)

Financial Summary

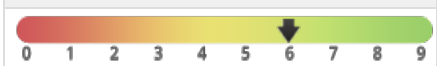
Balance Sheet · Income Statement · Cashflow

Year End 31st Dec		2015	2016	2017	2018	2019	2020	TTM	2021E	2022E	CAGR / Avg
Revenue	C\$m	289.3	263.9	378.3	343.9	329.2	343.3	367.9	431.3	437.2	+3.5%
Operating Profit	C\$m	-0.68	-25.7	79.0	28.2	-61.4	6.05	17.0			
Net Profit	C\$m	-62.4	-31.4	34.3	-35.8	-53.4	-23.5	14.2	23.7	19.7	
EPS Reported	C\$	-0.28	-0.14	0.15	-0.16	-0.22	-0.094	0.062			
EPS Normalised	C\$	-0.28	-0.14	0.20	-0.16	-0.22	-0.094	0.091	0.099	0.11	
EPS Growth	%										
PE Ratio	x						n/a	27.3	25.2	23.5	
PEG	x						n/a	n/a	3.56	n/a	
Profitability											
Operating Margin	%	-0.2	-9.7	20.9	8.2	-18.6	1.8	4.61			+0.4%
ROA	%		-3.3	3.5	-3.6	-5.8		1.45			
ROCE	%	-0.08	-2.9	8.5	3.1	-7.5	0.7	1.71			+0.3%
ROE	%		-8.9	9.7	-10.0	-16.5	-7.6	4.94			-6.6%
Cashflow											
Op. Cashflow ps	C\$	0.23	0.15	0.91	0.41	0.17	0.42	0.32			+12.7%
Capex ps	C\$	0.085	0.085	0.42	0.42	0.21	0.26	0.22			+25.1%
Free Cashflow ps	C\$	0.15	0.068	0.49	-0.003	-0.033	0.16	0.10			+1.9%
Dividends											
Dividend ps	C\$										
Dividend Growth	%										
Dividend Yield	%										
Dividend Cover	x										
Balance Sheet											
Cash etc	C\$m	69.5	90.4	82.7	49.2	53.9	86.9	198.6			+4.6%
Working Capital	C\$m	30.1	110.5	84.3	47.0	46.6	78.7	213.7			+21.2%
Net Fixed Assets	C\$m	842.9	778.6	837.8	862.7	764.8	747.9	773.5			-2.4%
Net Debt	C\$m	295.8	298.8	246.5	306.2	319.6	276.5	341.1			
Book Value	C\$m	370.3	338.9	367.1	347.1	301.7	317.4	305.5			-3.0%
Average Shares	m	221.8	221.8	232	227.9	243.9	250.5	264.5			+2.5%
Book Value ps	C\$	1.67	1.53	1.62	1.52	1.23	1.12	1.08			-7.6%

Health Trend

Piotroski F-Score

6



Bankruptcy Risk

Altman Z2-Score

1.66



Earnings Manipulation Risk

Low

Magic Formula Score

1186 54% C+



Other Ratios

Leverage (ttm)		total	-intang	+pension
Gross Gearing	%	176.7	179.7	176.7
Net Gearing	%	111.6	113.6	111.6
Cash / Assets	%	18.5		18.5
Liquidity (ttm)		Efficiency (ttm)		
Curr. Ratio	3.70	●	Asset Turnover	0.37
Quick Ratio	3.06	●	Rec's Turnover	48.0
Interest Cov.	68.1	●	Stock Turnover	6.38

Recent History

vs. industry vs. market

Latest interim period (ended 31st Mar '21) vs. prior year

Sales Growth 39.7 %

EPS Growth n/a %

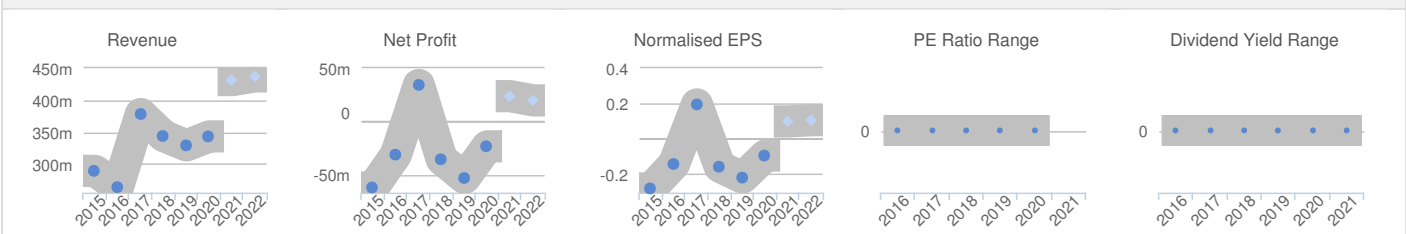
3yr Compound Annual Growth Rate

Sales Growth -3.19 %

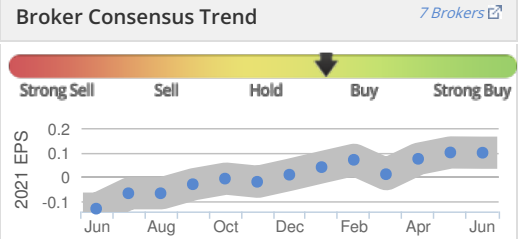
EPS Growth n/a %

DPS Growth n/a %

Graphical History Current Fiscal Year 2021



Broker Forecasts				31st Dec 2021			31st Dec 2022		
Price Target: C\$3.07 (+23.11% above Price)				Net Profit	EPS	DPS	Net Profit	EPS	DPS
Est. Long Term Growth Rate: n/a				(C\$)	(C\$)	(C\$)	(C\$)	(C\$)	(C\$)
Consensus Estimate				23.7m	0.099	-	19.7m	0.11	-
1m Change				-	-0.001	-	-	-	-
3m Change				+22.4m	+0.088	-	+22.6m	+0.083	-



Profile Summary



Taseko Mines Limited is a mining company. The Company is principally engaged in the production and sale of metals, as well as related activities, including exploration and mine development, within the province of British Columbia, Canada and the State of Arizona, the United States. Its projects represent a range of metals, including gold, copper and niobium.

The Company's operating asset is the Gibraltar Mine, which is a copper-molybdenum mine located in south-central British Columbia. The Company also owns the New Prosperity gold-copper, Aley niobium, Florence copper and Harmony gold projects. The Harmony gold project is located on Graham Island off British Columbia's west coast. The Aley niobium project is located in northern British Columbia. The Florence copper project is located midway between Phoenix and Tucson near the community of Florence. It also owns the Yellowhead Project, which is located in the Thompson-Nicola area of British Columbia.

Directors: [Robert Dickinson \(IND\) 72](#), [Ronald Thiessen \(NEC\) 68](#), [Russell Hallbauer \(CEO\) 66](#), [John McManus \(COO\) 61](#), [Brian Battison \(VPR\)](#), [Peter Mitchell \(IND\) 65](#), [Trevor Thomas \(SEC\) 53](#), [Robert Rotzinger \(VPR\)](#), [Stuart McDonald \(PRE\)](#), [Brian Bergot \(VPR\)](#), [Anu Dhir \(IND\) 49](#), [Kenneth Pickering \(IND\) 73](#), [Bryce Hamming \(CFO\)](#), [Richard Tremblay \(VOP\)](#),

No. of Employees: 191

No. of Shareholders: n/a



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Phone +1 778 3734533
Contact ()
Auditors KPMG LLP

Last Annual	December 31st, 2020
Last Interim	March 31st, 2021
Incorporated	April 15, 1966
Public Since	May 22, 1981
Shares in Issue	283,189,024
Free Float	272.4m (96.2%)

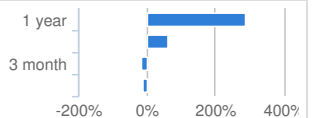
Sector [Basic Materials](#)
Industry [Metals & Mining](#)
Index
Exchange London Stock Exchange ([Dual Listing](#))
Eligible for an ISA? a SIPP?

TKO Share Price Quote

TKO Share Price GBp **Day's Change**
140.51p ▼ **-4.5 -3.1%**
 Traded 8:12am · Minimum 15 min delayed · NMS: 7.50k

Volume	Bid - Ask	Low - High	Spread
200	140.0 - 150.0	0.0 - 0.0	712bps
Avg Vol (3m)	Open - Close	12m Range	Beta
12,471	145.0 - 145.0	105.0 - 140.0	0.00

TKO Share Price Performance



Latest TKO News Announcements (delayed)

[More »](#)

- 29th Jan [EUROPE RESEARCH ROUNDUP-Cargotec, Synthomer, WH Smith](#)
- 26th Nov '20 [EUROPE RESEARCH ROUNDUP- CRH, Solvay, Vistry Group](#)

Upcoming TKO Events

Recent ↓

Industry Peer Group	
	Zinnwald Lithium Compare vs TKO
	Power Metal Resour... Compare vs TKO
	Thor Mining Compare vs TKO
	AfriTin Mining Compare vs TKO
	Savannah Resources Compare vs TKO
	Horizonte Minerals Compare vs TKO
	Tirupati Graphite Compare vs TKO
	European Metals Ho... Compare vs TKO
Basic Materials Metals & Mining	

