

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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Tekcapital

TEK  15.25p ▼ -0.3 -1.6%Highly Speculative, Micro Cap, **Value Trap**

Market Cap

£20.0m

Quality

▲ 18

Enterprise Value

£19.6m

Value

96

Revenue

£6.98m

Momentum

19

Market Cap Rank

1474th / 1812

StockRank™

38

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



Momentum

Relative Strength (%)

1m +15.8% ●

3m -0.5% ●

1yr -13.9% ●

Volume Change (%)

10d v 3m -17.3% ●

Price vs... (%)

52w High -30.6% ●

50d MA +19.6% ●

200d MA +16.7% ●

Growth & Value

12m Forecast Rolling

PE Ratio (ttm) 2.29

PEG Ratio (ttm) n/a

EPS Growth (ttm) -4.04 %

Dividend Yield (ttm) n/a %

Valuation (ttm)

Price to Book Value 0.86

Price to Tang. Book 0.89

Price to Free Cashflow n/a

Price to Sales 2.86

EV to EBITDA 3.60

Quality

Return on Capital 23.5 %

Return on Equity 27.8 %

Operating Margin 77.7 %

Health Trend Piotroski F-Score 3



Bankruptcy Risk Altman Z-Score n/a



Earnings Manipulation Risk High

Magic Formula Score 251 97% A+



Other Ratios

Leverage (ttm)	total	-intang	+pension
Gross Gearing	%		
Net Gearing	%	-1.65	-1.65
Cash / Assets	%	1.63	1.63

Liquidity (ttm)	Efficiency (ttm)
Curr. Ratio	2.95 ● Asset Turnover 0.33
Quick Ratio	2.95 ● Rec's Turnover 11.7
Interest Cov.	n/a Stock Turnover n/a

Recent History

Latest interim period (ended 30th Nov '20) vs. prior year

Sales Growth 203.3 %

EPS Growth 273 %

3yr Compound Annual Growth Rate

Sales Growth 12.0 %

EPS Growth -2.74 %

DPS Growth n/a %

Margin of Safety (beta)

Relative to Sector 820%

Graham Formula 2500%

Stability Value (EPV) -53%

Screens Passed 2

TEK qualifies for **Beneish M-Score Screen**
(in **Short Selling**).[View Screen](#) · [View Checklist](#)

Financial Summary

Balance Sheet · Income Statement · Cashflow

Year End 30th Nov		2015	2016	2017	2018	2019	2020	2021E	2022E	CAGR / Avg
Revenue	\$m	0.41	0.76	7.04	6.83	7.72	9.88			+89.2%
Operating Profit	\$m	-1.46	-2.56	4.15	4.56	5.52	7.68			
Net Profit	\$m	-1.46	-2.22	4.49	4.55	5.52	7.68			
EPS Reported	\$	-0.049	-0.063	0.11	0.10	0.094	0.094			
EPS Normalised	\$	-0.049	-0.063	0.10	0.10	0.094	0.094			
EPS Growth	%				+0.6	-9.3	+0.8			
PE Ratio	x						2.29	n/a	n/a	
PEG	x						n/a	n/a	n/a	

Profitability

Operating Margin	%	-358.5	-334.5	59.0	66.7	71.5	77.7			-69.7%
ROA	%		-58.4	61.7	33.3	28.0	27.4			
ROCE	%	-39.3	-81.6	38.9	28.2	24.5	23.5			-1.0%
ROE	%		-68.8	67.0	34.0	28.5	27.8			+17.7%

Cashflow

Op. Cashflow ps	\$	-0.041	-0.068	-0.066	-0.020	-0.024	-0.012			
Capex ps	\$	0.006	0.012	0.001	0.001	0.000	0.000			-70.9%
Free Cashflow ps	\$	-0.046	-0.080	-0.067	-0.021	-0.024	-0.012			

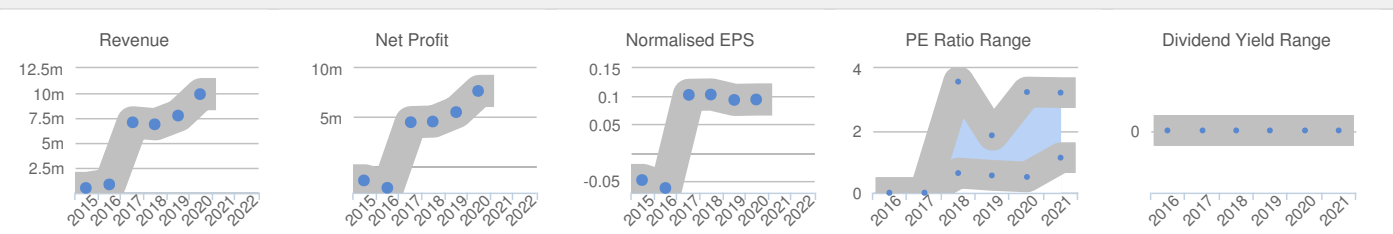
Dividends

Dividend ps	\$									
Dividend Growth	%									
Dividend Yield	%									
Dividend Cover	x									

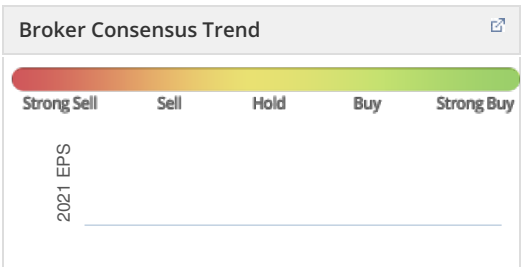
Balance Sheet

Cash etc	\$m	3.14	1.84	1.80	1.17	0.47	0.54			-29.7%
Working Capital	\$m	3.00	1.68	2.52	1.31	0.86	0.78			-23.6%
Net Fixed Assets	\$m	0.008	0.051	7.31	14.0	20.8	31.1			+423.3%
Net Debt	\$m	-3.14	-1.84	-1.80	-1.17	-0.47	-0.54			
Book Value	\$m	3.72	2.72	10.7	16.1	22.5	32.7			+54.5%
Average Shares	m	29.9	35.2	41.5	44.1	58.9	81.3			+22.2%
Book Value ps	\$	0.11	0.077	0.25	0.30	0.35	0.35			+27.0%

Graphical History Current Fiscal Year 2021



Broker Forecasts				30th Nov 2021			30th Nov 2022		
Price Target: N/A				Net Profit	EPS	DPS	Net Profit	EPS	DPS
Est. Long Term Growth Rate: n/a				(£)	(£)	(£)	(£)	(£)	(£)
Consensus Estimate				-	-	-	-	-	-
1m Change				-	-	-	-	-	-
3m Change				-	-	-	-	-	-



Profile Summary



Tekcapital plc is an international provider of technology and intellectual property (IP) services. The Company operates through two segments: professional services, including the provision of reports and any services provided to locate and transfer technologies to customers, and licensing activities, including acquiring licenses for technologies and their subsequent out licensing. The Company's Invention Evaluator includes systematic analysis of technology, IP and market opportunity. It sources technologies from over 3,300 research institutions in over 160 countries. It provides a range of services, such as Technology Sourcing, providing a monthly advisory report tailored to each client, listing the technologies available for acquisition or license; Objective Analysis of New Technologies, providing professional service to help clients assess the marketability of a new technology, and Technology Transfer Placement Services, matching talented professionals with career opportunities.

Directors: Clifford Gross (CHM) 57, Maurice Groat (FID) 56, Alexander Inglis (GCN), Umesh Amin (EVP), Richard Matner (OTH), Selwyn Lloyd (CIO), Robert Miller (NED) 53, Louis Castro (DRC) 62, David Willetts (DRC),

No. of Employees: 6

No. of Shareholders: n/a

Last Annual	November 30th, 2020	Sector	Technology
Last Interim	November 30th, 2020	Industry	Software & IT Services
Incorporated	February 3, 2014	Index	FTSE Aim All Share ,
Public Since	April 4, 2014	Exchange	London Stock Exchange (AIM)
Shares in Issue	130,828,042	Eligible for	an ISA? a SIPP?
Free Float	105.2m (80.4%)		



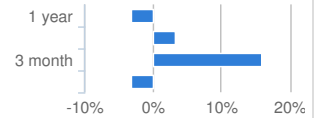
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Phone +44 1865 338102
Contact ()
Auditors HW Fisher & Company

TEK Share Price Quote

TEK Share Price GBP **Day's Change**
15.25p **-0.3 -1.6%**
 Traded 4:25pm · Minimum 15 min delayed · NMS: 5.00k

Volume	Bid - Ask	Low - High	Spread
546,279	14.5 - 16.0	16.0 - 16.0	984bps
Avg Vol (3m)	Open - Close	12m Range	Beta
1,163,122	15.5 - 15.3	10.5 - 21.0	0.34

TEK Share Price Performance



Latest TEK News Announcements (delayed)

[More »](#)

- 28th May Tekcapital plc Belluscura plc IPO
- 28th May Tekcapital plc Belluscura plc IPO
- 28th May Tekcapital plc - Results of Annual General Meeting
- 28th May Tekcapital plc - Belluscura First Day of Dealings on AIM
- 21st May AIM Belluscura PLC - Schedule One Update - Belluscura PLC

Upcoming TEK Events

Tuesday 27th July, 2021 (Estimate)
 Tekcapital PLC Annual Shareholders Meeting

Recent ↓

Industry Peer Group

- Cohort**
Compare vs TEK
- Tracsis**
Compare vs TEK
- Kin and Carta**
Compare vs TEK
- Seeing Machines**
Compare vs TEK
- First Derivatives**
Compare vs TEK
- NCC**
Compare vs TEK
- FDM (Holdings)**
Compare vs TEK
- Bytes Technology**
Compare vs TEK

[Technology](#)

[Software & IT Services](#)