



ShareSoc

UK Individual Shareholders Society

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SHARESOC GROWTH COMPANY SEMINAR

STOCKOPEDIA FINANCIAL ANALYSIS REPORTS ON PRESENTING COMPANIES

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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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GFRD – Galliford Try Holdings

177.80p ↓ -6.00 -3.26%



EMS: 3k

Industrials · Speculative · Small Cap · Super Stock

Market Cap

Enterprise Value

Revenue

Position in Market

£204.12m

£7.12m

£1.12b

771st / 1,778

Quality

Value

Momentum

StockRank™

63

87

73

89

1m 3m YTD 1y 3y All



Momentum

Relative Strength (%)	
1m	+8.76% ●
3m	+11.0% ●
6m	+12.8% ●
1y	+17.5% ●
Volume Change (%)	
10d / 3m	+22.3% ●
Price vs... (%)	
52w High	-13.7% ●
50d MA	+2.96% ●
200d MA	+8.93% ●

Growth & Value

12m Forecast Rolling		Industry	Market
PE Ratio (f)	11.7	●	●
PEG Ratio (f)	1.7	●	●
EPS Growth (f)	7.6%	●	●
Dividend Yield (f)	4.04%	●	●
Valuation (ttm)		Industry	Market
Price to Book Value	1.52	●	●
Price to Tang. Book	3.99	●	●
Price to Free Cashflow	3.3	●	●
Price to Sales	0.18	●	●
EV to EBITDA	0.33	●	●

Shareholder Activity

Buy / Hold / Sell	
Institutions	●
Directors	●
Community	●

Screens Passed: 1 Long

GFRD qualifies for **Trading below Cash**
Screen (Bargain Stocks)

[View Screen](#) [View Checklists](#)

Quality

		Industry	Market
Return on Capital	5.8%	●	●
Return on Equity	8.2%	●	●
Operating Margin	0.76%	●	●

Financial Summary

Year End 30th Jun		2016	2017	2018	2019	2020	2021	2022E	2023E	CAGR / Avg
Total Revenue	£m	2,495	2,705	2,932	1,403	1,090	1,125	1,298	1,408	-14.7%
Operating Profit	£m	144	70.6	151	-66.5	-39.4	8.50			-43.2%
Net Profit	£m	109	48.7	118	86.9	320	7.70	15.6	19.7	-41.1%
EPS Reported	p	118	52.9	121	-46.5	-29.4	9.14			-40.1%
EPS Normalised	p	116	168	175	4.88	-56.4	15.8	13.9	16.5	-32.8%
EPS Growth	%	+12.5	+45.2	+4.25	-97.2			-11.9	+18.2	
PE Ratio	x						11.6	13.2	11.2	
PEG								0.724	0.793	
Profitability										
Operating Margin	%	5.76	2.61	5.16	-4.74	-3.62	0.756			0.989%
ROA	%		1.78	4.04	-1.87	-1.96	1.65			
ROCE	%	15.6	8.07	15.1	-7.53	-27.5	5.82			1.58%
ROE	%		8.29	18.8	-7.57	-8.15	8.17			3.91%
Cashflow										
Op. Cashflow ps	p	84.0	115	31.0	-53.8	-137	55.9			-7.82%
Capex ps	p	8.57	5.54	4.69	3.34	1.26	1.85			-26.4%
Free Cashflow ps	p	75.4	110	26.3	-57.2	-139	54.1			-6.44%
Dividends										
Ex-date: 10 Mar / Paid: 8 Apr										
Dividend ps	p	73.8	86.4	74.2	58.0	0.000	4.70	6.61	7.82	-42.3%
Dividend Growth	%	+20.6	+17.1	-14.1	-21.8	-100		+40.7	+18.3	
Dividend Yield	%						2.56	3.60	4.25	
Dividend Cover	x	1.60	0.612	1.63	-0.802		1.94	2.11	2.11	
Balance Sheet										
Cash etc	£m	600	1,146	912	591	197	216			-18.5%

Health Trend (F-Score)

7/9



Bankruptcy Risk (Z-Score)

0.5



Earnings Manipulation Risk (M-Score)

Low

Other Ratios

Leverage (ttm)	Total	- Intang	+ Pension
Gross Gearing %	14.3	37.5	14.3
Net Gearing %	-146.91	-384.77	-146.9
Cash / Assets %	33.85		33.9
Liquidity (ttm)			
Curr. Ratio			0.95 ●
Quick Ratio			0.95 ●
Interest Cov.			100.00 ●
Efficiency (ttm)			
Asset Turnover			1.79
Recs Turnover			5.36
Stock Turnover			n/a

Working Capital	£m	633	510	580	340	-14.4	-24.4		
Net Debt	£m	8.70	-7.20	-98.2	56.6	-175	-197		
Net Fixed Assets	£m	139	186	249	372	72.8	87.5	-8.81%	
Book Value	£m	600	576	682	679	121	134	-25.9%	
Average Shares	m	92	92	98	111	111	114	4%	
Book Value ps	p	651	694	614	612	109	121	-28.6%	

FINANCIAL BRIEF: For the fiscal year ended 30 June 2021, Galliford Try Holdings PLC revenues increased 3% to £1.12B. Net... [See more](#)

Recent History

Latest interim period vs. prior period	Industry	Market
Sales Growth	28.61%	
EPS Growth	n/a	
3yr Compound Annual Growth Rate	Industry	Market
Sales CAGR	-27.34%	
EPS CAGR	-55.14%	
DPS CAGR	-60.14%	

Graphical History

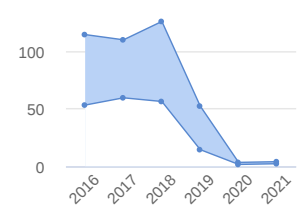
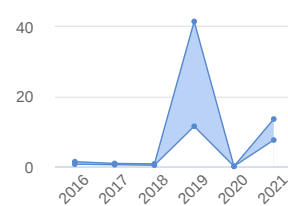
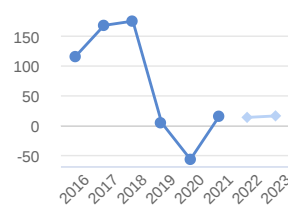
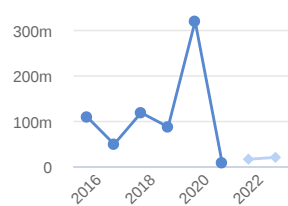
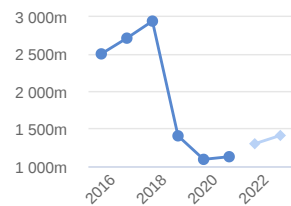
Revenue

Net Income

Normalised EPS

PE Ratio Range

Dividend Yield Range

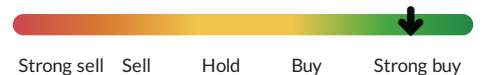


Analyst Forecasts

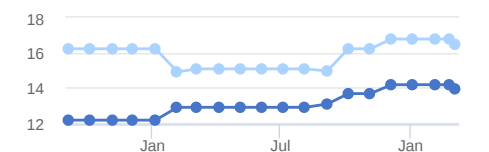
Price Target: 257.00p (39.83% above Price)	30th Jun 2022			30th Jun 2023		
Est. Long Term Growth Rate: +10.4%	Net Profit (£)	EPS (p)	DPS (p)	Net Profit (£)	EPS (p)	DPS (p)
Consensus Estimate	15.62m	13.94	6.61	19.69m	16.48	7.82
1m Change	-4.00k	-0.24	+0.63	-0.30	+0.80	
3m Change	-4.00k	-0.24	+0.63	-0.30	+0.80	

Analyst Consensus

4 brokers



EPS 2022 / 2023



Profile Summary

Galliford Try Holdings plc is a United Kingdom-based construction business company. The Company's segments include Building, Infrastructure, PPP Investments and Central. Its construction business operates with clients in the public and regulated sectors, such as health, education and defense mark... [Read more](#)

Directors

Kevin Corbett GCN (61)	Terry Miller NID (68)	Peter Ventress NEC (60)	Gavin Slark NID (56)	Bill Hocking CEO (57)	Marisa Cassoni NID (68)	Andrew Duxbury FID (45)
Vikki Skene DHR	Ian Jubb MDR (57)	Mark Baxter MDR (49)				

Last Annual	Jun 30, 2021
Last Interim	Jun 30, 2021
Incorporated	Sep 19, 2019
Public Since	Jan 3, 1986
Ex-Dividend Date	Mar 10, 2022
Payment Date	Apr 8, 2022
No. of Employees	2,416
No. of Shareholders	3,690

Sector
Industry
Index

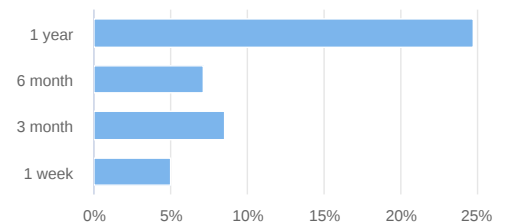
Exchange
Asset Category
Shares in Issue
Free Float
Eligible for

Industrials
Construction & Engineering
FTSE All Share Index, FTSE All-share - Industrials Price Return Index Gbp End Of Day, FTSE All-share - Construction & Materials Price Return Index Gbp End Of Day, FTSE Smallcap Index, FTSE Smallcap Ex Its Index
LSE Main Market
Common Stock
111,053,489
105,654,811 (95.14%)
✓ ISAs ✓ SIPPs

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Web	https://www.gallifordtry.co.uk
Phone	
Contact	Kevin Corbett (General Counsel, Member of the Executive Board, Company Secretary)
Auditors	BDO LLP

GFRD Share Price Performance

Share Price	Volume	Bid - Ask	Low - High	Spread
177.80p	293,439	177.70p - 178.20p	176.70 - 181.70	5bps
Day's Change	Avg Volume	Open - Close	Range (12m)	Beta
↓ -6.00 -3.26%	215,416	181.70 - 177.80	118.30 - 213.00	1.098



Latest News for GFRD

5:03 pm

Announcement

Galliford Try Hldgs - Holding(s) in Company

Yesterday 8:10 am

News

BRIEF-Galliford Try Holdings H1 Revenue Rose 10% To 594 Million Stg

Yesterday 7:00 am

Announcement

Galliford Try Hldgs - Half-year Results

Feb 9, 2022

News

BRIEF-Galliford Try Says Building And Highways Businesses Appointed To Major New Public Sector Framework

Feb 9, 2022

Announcement

Galliford Try Hldgs - Contract

Similar to GFRD

Compare

☐	Chinhung International Inc Contrarian	55
☐	Kye-ryong Construction Industrial Co Super Stock	98
☐	Nihon Dengi Co Neutral	83
☐	Seikitokyu Kogyo Co Neutral	59
☐	Formosan Rubber Inc Super Stock	92
☐	Baoye Co Neutral	86
☐	Mt Hoejgaard Holding A/s Neutral	57
☐	Innovate Neutral	59

Upcoming Events for GFRD

Monday, March 7th 2022

Half Year 2022 Galliford Try Holdings PLC Earnings Call (Retail Investors)

Thursday, March 10th 2022

Dividend For GFRD.L - 2.2000 GBX

Thursday, July 14th 2022

Q4 2022 Galliford Try Holdings PLC Trading Statement Release

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