

SHARESOC GROWTH COMPANY SEMINAR

STOCKOPEDIA FINANCIAL ANALYSIS REPORTS ON PRESENTING COMPANIES

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

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ENSI – EnSilica

51.45p ↓ -0.05 -0.1%

 EMS: 2k

Market Cap£49.75m

Enterprise Value£53.60m

Revenue£21.44m

Position in Market933rd / 1,579

Quality33

Value19

Momentum19

StockRank™14

Technology · Highly Speculative · Micro Cap · Sucker Stock



Momentum

Relative Strength (%)	
1m	+16.4% ●
3m	+8.02% ●
6m	-27.4% ●
1y	-35.0% ●
Volume Change (%)	
10d / 3m	+36.4% ●
Price vs... (%)	
52w High	-31.8% ●
50d MA	+9.41% ●
200d MA	+3.24% ●

Growth & Value

12m Forecast Rolling		Industry	Market
PE Ratio (f)	9.8		
PEG Ratio (f)	0.2		
EPS Growth (f)	124.5%		
Dividend Yield (f)	0.00%		
Valuation (ttm)		Industry	Market
Price to Book Value	3.01		
Price to Tang. Book	38.81		
Price to Free Cashflow	64.2		
Price to Sales	2.32		
EV to EBITDA	37.07		

Shareholder Activity

Buy / Hold / Sell

Institutions

Directors

Community

Screens Passed:

0 Long

1 Short

ENSI qualifies for **James Montier 'Cooking the Books' Screen** (Short Selling)
[View Screen](#) [View Checklists](#)

Financial Summary

Fiscal Year End	May	2018	2019	2020	2021	2022	2023	TTM	2024E	2025E	CAGR / Avg
Total Revenue	£m		6.27	6.45	8.61	15.3	20.5	21.4	25.0	30.2	34.4%
Operating Profit	£m		0.627	-0.174	-2.19	0.006	0.825	0.734			7.10%
Net Profit	£m		1.13	0.161	-2.07	0.149	1.79	1.99	1.88	4.45	12.1%
EPS Reported	p	0.000	1.51	0.214	-2.76	0.196	2.30	2.66			11.2%
EPS Normalised	p	0.000	1.51	0.603	-1.01	0.793	2.30	2.66	2.33	5.23	11.1%
EPS Growth	%			-60.1			+190	+15.5	+1.26	+124	
PE Ratio	x						22.4	19.4	22.1	9.85	
PEG							17.8	15.4	0.178	0.151	
Profitability											
Operating Margin	%		10.0	-2.70	-25.4	0.039	4.03	3.42			-2.81%
ROA	%		31.1	1.67	-16.3	0.898	7.57	7.14			
ROCE	%		11.8	-1.90	-23.3	0.036	3.80	3.39			-1.91%
ROE	%		50.7	3.53	-55.4	1.99	12.7	13.6			2.71%
Cashflow											
Op. Cashflow ps	p		2.91	2.64	-0.577	1.83	2.31	8.55			-5.55%
Capex ps	p		3.34	4.46	2.28	3.31	5.81	7.60			14.9%
Free Cashflow ps	p		-0.428	-1.82	-2.86	-1.48	-3.50	0.951			
Dividends											
Dividend ps	p	0.000	0.000	0.000	0.000	0.000	0.000	0.000			
Dividend Growth	%										
Dividend Yield	%							0.000	0.000	0.000	
Dividend Cover	x										
Balance Sheet											
Cash etc	£m		0.419	2.18	1.40	5.74	3.10	2.09			64.9%
Working Capital	£m	0.000	0.906	2.03	2.63	7.61	6.71	3.38			65.0%

Quality

	Industry	Market
Return on Capital	3.4%	
Return on Equity	13.6%	
Operating Margin	3.42%	

Health Trend (F-Score)

5/9

0 1 2 3 4 5 6 7 8 9

Bankruptcy Risk (Z1-Score)

3.96

Distress Cautious Safe

Earnings Manipulation Risk (M-Score)

High

Other Ratios

Leverage (ttm)	Total	- Intang	+ Pension
Gross Gearing %	36.0	463.4	37.1
Net Gearing %	23.31	300.23	24.5
Cash / Assets %	7.45		7.5
Liquidity (ttm)			
Curr. Ratio			1.52 ●
Quick Ratio			1.47 ●
Interest Cov.			0.92 ●
Efficiency (ttm)			
Asset Turnover			0.77
Recs Turnover			4.36
Stock Turnover			37.49

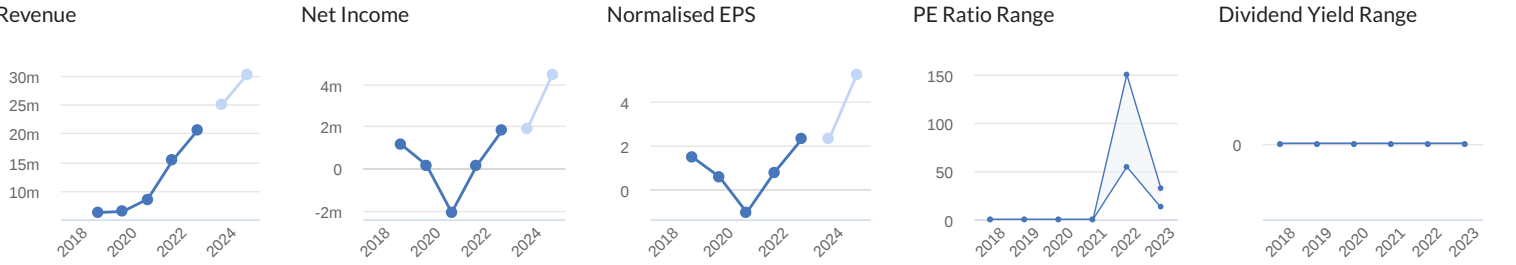
Fiscal Year End May		2018	2019	2020	2021	2022	2023	TTM	2024E	2025E	CAGR / Avg
Net Debt	£m	0.000	0.320	2.00	4.69	-0.583	3.35	3.85			
Net Fixed Assets	£m	0.000	0.319	0.275	0.262	0.382	2.57	3.05			68.4%
Book Value	£m	0.000	4.47	4.65	2.84	12.2	16.0	16.5			37.4%
Average Shares	m		75	75	75	76	78	81			1%
Book Value ps	p		5.95	6.18	3.77	16.2	20.4	21.1			36.2%

FINANCIAL BRIEF: For the six months ended 30 November 2023, EnSilica PLC revenues increased 11% to £9.6M. Net income... [See more](#)

Recent History

Latest interim period vs. prior period		Industry	Market
Sales Growth	11.18%		
EPS Growth	65.3%		
3yr Compound Annual Growth Rate		Industry	Market
Sales CAGR	46.95%		
EPS CAGR	56.27%		
DPS CAGR	n/a		

Graphical History



Analyst Forecasts

Price Target: (0.00% below Price)	31st May 2024			31st May 2025		
Est. Long Term Growth Rate:	Net Profit (£)	EPS (p)	DPS (p)	Net Profit (£)	EPS (p)	DPS (p)
Consensus Estimate	1.88m	2.3		4.45m	5.2	
1m Change		0.0			0.0	
3m Change		0.0			0.0	

Analyst Consensus

1 broker

Strong sellSellHoldBuyStrong buy

EPS 2024 / 2025

Profile Summary

EnSilica PLC is a United Kingdom-based company, which operates as a supplier of mixed-signal application-specific integrated circuits (ASIC) to original equipment manufacturers (OEMs), and system houses. It also offers a portfolio of core IP covering cryptography, radar, and communications system... [Read more](#)

Directors

- Mark Hodgkins CHM (65)
- Ian Lankshear CEO (54)
- David Tilston NID (64)
- Janet Collyer NID (65)
- Wasim Ahmed NID (50)
- Noel Hurley NID (54)
- Chi Wa Wong SVP
- Patrick Mcnamee VPR
- Bernard Wu VPR
- Paul Morris VPR
- Ramesh Doddamane VPR
- Peter Jeutter VPR
- David Wheeler VPR
- Kristoff Rademan CFO (45)

Last Annual	May 31, 2023	Sector	Technology
Last Interim	Nov 30, 2023	Industry	Semiconductors & Semiconductor Equipment
Incorporated	May 21, 2001	Index	FTSE AIM All Share Index, AIM Technology Index
Public Since	May 24, 2022	Exchange	LSE AIM Market
Payment Date		Asset Category	Common Stock
No. of Employees	168	Shares in Issue	96,600,636
No. of Shareholders	n/a	Free Float	32,190,354 (33.32%)
		Eligible for	✓ ISAs ✓ SIPPs

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Auditors UHY Hacker Young LLP

ENSI Share Price Performance

Share Price	Volume	Bid - Ask	Low - High	Spread	1 week	
51.45p	73,993	51.00p - 52.00p	51.00p - 51.00p	194bps	3 month	
Day's Change	Avg Volume	Open - Close	Range (12m)	Beta	6 month	
↓ -0.05 -0.1%	191,245	51.50p - 51.50p	29.00p - 75.50p		1 year	

Latest News for ENSI

Yesterday 6:00 am

Announcement

EnSilica PLC - Siemens AG Award Design & Supply Contract

Tue, Sep 10, 2024

Announcement

EnSilica PLC - Shipment Milestone of 5 Million Automotive ASICs

Mon, Sep 9, 2024

Announcement

EnSilica PLC - Appointment of US Advisor

Sep 3, 2024

Announcement

EnSilica PLC - Production order for Industrial ASIC received

Sep 2, 2024

Announcement

EnSilica PLC - Telecommunications ASIC Contract Valued Over \$30m

Similar to ENSI Compare

☐

AUK

Neutral

33

☐

Signetics

Sucker Stock

6

☐

Amosense Co

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MagaTouch Co

Sucker Stock

6

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atomera

Atomera

Sucker Stock

3

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CML Microsystems

Neutral

32

☐

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Momentum Trap

11

☐

Sequans Communications SA

Sucker Stock

5

Upcoming Events for ENSI

There are no upcoming events for this security

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- Each company on Stockopedia is evaluated on the basis of hundreds of fundamental and technical metrics that measure a company's Quality, Value, Growth, and Momentum.
- QVM StockRanks™:
 - This measure equally blends the Quality, Value and Momentum ranks into a core metric, the StockRank.
- QualityRank™:
 - The QualityRank is based on a composite of carefully selected company factors based on the latest academic research into understanding 'Quality'. The factors used are inspired by the writings of Warren Buffett, Joseph Piotroski, Edward Altman and Messod Beneish, as well as recent papers from Robert Novy-Marx of the University of Chicago and National Bureau of Economic Research.
 - Each company in the market is ranked from 1 to 100 for each of these Quality Factors and a composite score is calculated as a weighted average of all these values. The QualityRank™ is then calculated between zero and 100 for this composite score, where 100 is best and zero is worst.
- ValueRank™:
 - Our ValueRank is based on a composite of the following Value factors: Price to Book Value ; Price to Earnings ; Price to Free Cash Flow ; Dividend Yield % ; Price to Sales ; Earnings Yield %
 - Consistent with the value investing philosophy, we use historic ratios for each of these metrics, rather than factoring in analyst forecasts. Each company in the market is ranked from 1 to 100 for each of these value ratios and a composite score is calculated as the weighted average of all valid values. The ValueRank™ is then calculated between zero and 100 for this composite score, where

100 is best and zero is worst.

- MomentumRank™:
 - The MomentumRank is based on a composite of the following Price and Estimate Momentum Factors.
 - Price Momentum Factors:
 - Proximity of current share price to the 52 week high ; 50 day vs 200 day moving averages ; 1 year Relative Strength of the share price vs the market ; 6 Month Relative Strength of the share price vs the market.
 - Earnings Momentum Factors:
 - EPS estimate upgrades within the last one month for next financial year ; EPS estimate upgrades within the last three months for this financial year ; EPS surprise percentage based on the latest reported financials ; Scaled earnings surprise based on the standard deviation of the original Consensus forecast ; Consensus broker recommendation upgrade over the last month
 - Each company in the market is ranked from 1 to 100 for each of these momentum ratios and a composite score is calculated as a weighted average of all valid values. The MomentumRank is then calculated between zero and 100 for this composite score, where 100 is best and zero is worst.
 - When a company has no broker coverage we cannot calculate earnings momentum. As a result the Momentum Rank is calculated using price momentum factors alone.