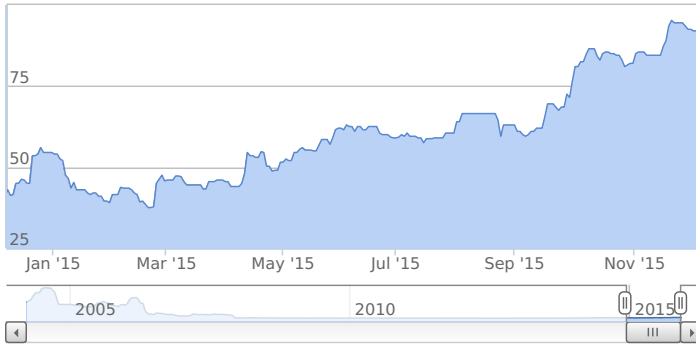


Crawshaw

CRAW 92p ▲ 0.0 0.0%

Market Cap	£72.5m	Value	7
Enterprise Value	£66.6m	Quality	91
Revenue	£29.5m	Momentum	99
Position in UK Edition	7309th	StockRank™	76

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



Momentum	
Relative Strength (%)	
1m	+9.1% ●
3m	+49.3% ●
1yr	+135.4% ●
Volume Change (%)	
10d v 3m	-86.1% ●
Price vs... (%)	
52w High	-3.9% ●
50d MA	+6.94% ●
200d MA	+43.6% ●

Growth & Value		vs. industry	vs. market
12m Forecast Rolling			
PE Ratio (ttm)	220.1		
PEG Ratio (ttm)	n/a		
EPS Growth (ttm)	-77.0 %		
Dividend Yield (ttm)	0.62 %		
Valuation (ttm)			
Price to Book Value	3.70		
Price to Tang. Book	8.59		
Price to Free Cashflow	2,290		
Price to Sales	2.46		
EV to EBITDA	70.0		

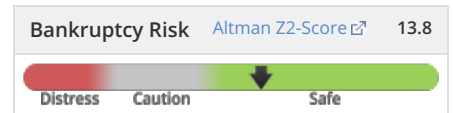
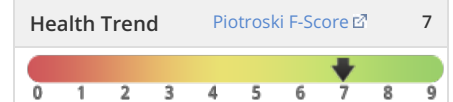
Margin of Safety (beta)	
Broker Target	9% ▲
Relative to Sector	-78% ▼
Stability Value (EPV)	-76% ▼

Screens Passed

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

Quality		vs. industry	vs. market
Return on Capital	1.58 %		
Return on Equity	1.36 %		
Operating Margin	1.10 %		

Financial Summary		Balance Sheet · Income Statement · Cashflow									
Year End 31st Jan		2010	2011	2012	2013	2014	2015	TTM	2016E	2017E	CAGR / Avg
Revenue	£m	19.0	19.1	18.9	18.8	21.0	24.6	29.5	37.0	50.7	+5.4%
Operating Profit	£m	0.24	0.64	0.005	0.26	0.99	1.14	0.33			+37.5%
Net Profit	£m	0.23	0.42	0.015	0.18	0.83	0.90	0.27			+31.5%
EPS Reported	p	0.41	0.72	0.026	0.31	1.42	1.31	0.34			+26.6%
EPS Normalised	p	0.52	0.73	0.18	0.33	1.42	1.31	0.42	0.20		+20.6%
EPS Growth	%	+623.9	+41.4	-75.7	+81.4	+342.4	-7.7	-77.0	-84.7		
PE Ratio	x						70.2	220.1	460	n/a	
PEG	x						n/a	n/a	n/a	n/a	
Profitability											
Operating Margin	%	1.2	3.4	0.03	1.3	4.7	4.6	1.10			+2.5%
ROA	%		3.0	0.2	1.3	5.9	4.8	1.09			
ROCE	%	2.0	5.4	0.05	2.3	8.5	5.5	1.58			+3.9%
ROE	%		4.3	0.2	1.8	7.9	5.8	1.36			+4.0%
Cashflow											
Op. Cashflow ps	p	1.04	1.97	0.68	0.74	2.37	2.26	3.13			+16.8%
Capex ps	p	1.14	1.19	0.35	0.33	0.43	2.27	3.08			+14.9%
Free Cashflow ps	p	-0.095	0.78	0.33	0.41	1.94	-0.011	0.047			
Dividends Last ex-div: 8th Oct, paid: 30th Oct more...											
Dividend ps	p				0.20	0.52	0.57	0.57	0.60	0.60	
Dividend Growth	%					+160	+9.62	+7.55	+5.26		
Dividend Yield	%						0.62	0.62	0.66	0.66	
Dividend Cover	x				1.55	2.73	2.29	0.60	0.34		
Balance Sheet											
Cash etc	£m	0.81	0.73	0.61	0.86	1.43	9.09	6.00			+62.6%
Working Capital	£m	-0.48	-0.79	-0.61	-1.06	-0.075	7.68	2.89			
Net Fixed Assets	£m	4.63	4.92	4.57	4.37	4.26	5.47	6.42			+3.4%
Net Debt	£m	0.94	0.52	0.24	-0.011	-0.98	-9.09	-5.91			
Book Value	£m	9.49	9.93	9.94	10.1	10.8	20.0	19.6			+16.0%
Average Shares	m	56.8	57.8	57.8	57.8	57.8	68.6	68.5			+3.8%
Book Value ps	p	16.4	17.2	17.2	17.5	18.6	25.3	24.9			+9.1%

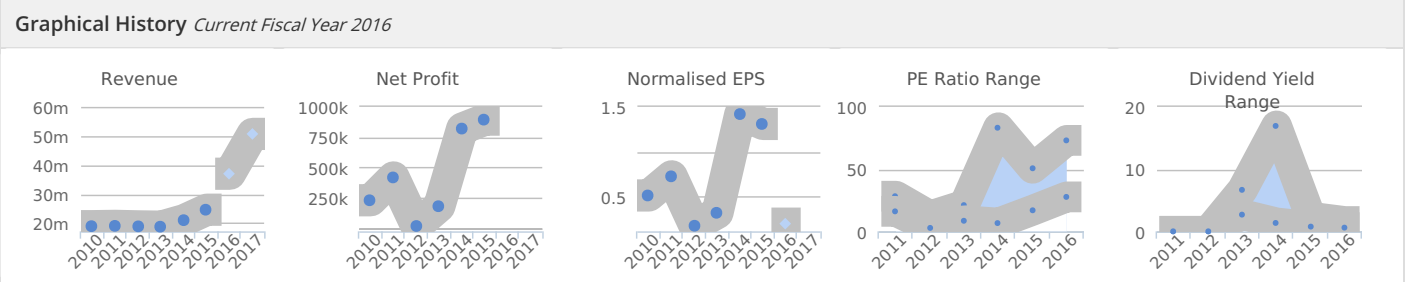


Earnings Manipulation Risk Low

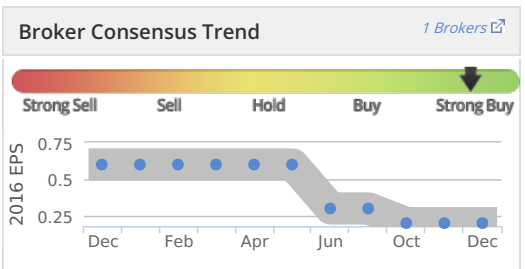


Other Ratios		total	ex intang
Leverage (ttm)			
Gross Gearing	%	0.47	1.09 ●
Net Gearing	%	-30.1	-70.0 ●
Cash / Assets	%	23.5	●
Liquidity (ttm)		Efficiency (ttm)	
Curr. Ratio	1.57 ●	Asset Turnover	1.21
Quick Ratio	1.38 ●	Rec's Turnover	43.2
Interest Cov.	100.0 ●	Stock Turnover	20.2

Recent History		vs. industry	vs. market
Latest interim period (ended 31st Jul '15) vs. prior year			
Sales Growth	41.0 %		
EPS Growth	n/a %		
3yr Compound Annual Growth Rate			
Sales Growth	9.23 %		
EPS Growth	94.9 %		
DPS Growth	n/a %		



Broker Forecasts	31st Jan 2016			31st Jan 2017		
Price Target: 1.00 (+8.71% above Price)	Net Profit	EPS	DPS	Net Profit	EPS	DPS
Est. Long Term Growth Rate: n/a	(£)	(p)	(p)	(£)	(p)	(p)
Consensus Estimate	-	0.20	0.60	-	-	0.60
1m Change	-	-	-	-	-	-
3m Change	-	-	-	-	-	-



Profile Summary



Crawshaw Group Plc is a United Kingdom-based meat and food-to-go retailer. The Company is engaged in the operation of a chain of meat focused retail food stores. The Company has distribution center in Rotherham, plus 22 retail locations across Yorkshire, Lincolnshire, Nottinghamshire and Derbyshire. Its products include baguettes, beef, chicken, lamb, pork, cooked meat, sausages and hot meals at its outlets. The Company, through Gabbotts Farm Limited, operates approximately 11 retail butchers units, which includes a factory meat mart attached to a small distribution center, in the North West of England. Its other subsidiaries include Crawshaw Holdings Limited, Crawshaw Butchers Limited and East Yorkshire Beef Limited.

Directors: Noel Collett (CEO) 40, Alan Richardson (CFO) 38, Lynda Sherratt (FID) 49, Kevin Boyd (MDR) 46, Richard Rose (NEC) 59, Mark Naughton-Rumbo (NED) 54,

No. of Employees: 296

No. of Shareholders: n/a

Last Annual	January 31st, 2015	Sector	Consumer Defensives
Last Interim	July 31st, 2015	Industry	Food & Drug Retailing
Incorporated	May 7, 2003	Index	FTSE Intl-aim All Share ,
Shares in Issue	78,818,795	Exchange	London Stock Exchange (AIM)
Free Float	64.0m (81.2%)	Eligible for	an ISA? <input checked="" type="checkbox"/> a SIPP? <input checked="" type="checkbox"/>



Address Unit 4 Sandbeck Way, Hellaby Industrial Estate, ROTHERHAM, S66 8QL, United Kingdom

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

Phone +44 1709 369600

Contact ()

Auditors KPMG LLP

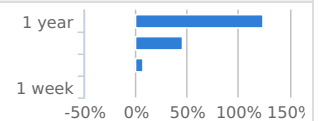
CRAWQuote

CRAW Share Price Day's Change
 GBp
92p ◆ 0.0 0.0%

Traded 1:34pm · Minimum 15 min delayed · NMS: 5.00k

Volume	10,291	Bid - Ask	90.0 - 94.0	Low - High	0.0 - 0.0	Spread	435bps
Avg Vol (3m)	314,554	Open - Close	92.0 - 92.0	12m Range	0.0 - 0.0	Beta	0.03

CRAW Share Price Performance



Latest CRAW News Announcements (delayed)

[More »](#)

Wed 12:01pm	Holding(s) in Company
Tue 7:00am	Total Voting Rights
20th Nov	Holding(s) in Company
19th Nov	Holding(s) in Company
18th Nov	Blocklisting Interim Review

Upcoming CRAW Events

Recent ↓

Industry Peer Group

	Fishing Republic Compare vs CRAW
	McColl's Retail Compare vs CRAW
	Majestic Wine Compare vs CRAW
	Conviviality Compare vs CRAW
	O'Key SA Compare vs CRAW
BOOKER	Booker Compare vs CRAW
	WM Morrison Superm...
	X5 Retail NV Compare vs CRAW

[Consumer Defensives](#)

[Food & Drug Retailing](#)

