

# Amino Technologies

**AMO** 156.15p ▼ -1.8 -1.2%

Market Cap

Enterprise Value

Revenue

Position in UK Edition

£111.0m

£93.7m

£37.7m

6550th

Value

Quality

Momentum

StockRank™

44

92

96

94

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



### Momentum

Relative Strength (%)	
1m	-3.1%
3m	+17.6%
1yr	+80.1%
Volume Change (%)	
10d v 3m	-27.6%
Price vs... (%)	
52w High	-7.6%
50d MA	-1.46%
200d MA	+11.7%

### Growth & Value

12m Forecast Rolling		vs. industry	vs. market
PE Ratio (f)	14.5		
PEG Ratio (f)	0.68		
EPS Growth (f)	27.6 %		
Dividend Yield (f)	3.70 %		
Valuation (ttm)			
Price to Book Value	3.90		
Price to Tang. Book	6.44		
Price to Free Cashflow	22.0		
Price to Sales	2.94		
EV to EBITDA	11.2		

### Margin of Safety (beta)

Broker Target	31%
Relative to Sector	-18%
Graham Formula	31%
Stability Value (EPV)	-64%

### Screens Passed 3

AMO qualifies for **Jim Slater ZULU Principle Screen (in Growth Investing)**.  
View Screen · View Checklist

### Quality

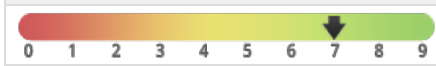
Return on Capital	19.9 %		
Return on Equity	22.0 %		
Operating Margin	15.3 %		

### Financial Summary

Balance Sheet · Income Statement · Cashflow

Year End 30th Nov	2009	2010	2011	2012	2013	2014	TTM	2015E	2016E	CAGR / Avg
Revenue	£m	25.3	44.0	51.8	41.7	35.9	37.7	49.5	78.3	+7.4%
Operating Profit	£m	-8.79	-0.90	-0.63	2.83	4.12	3.96	5.76		
Net Profit	£m	-8.72	-0.35	-0.21	2.84	4.17	4.07	5.92	6.73	
EPS Reported	p	-16.0	-0.62	-0.39	5.41	7.83	7.62	11.2		
EPS Normalised	p	-10.3	1.44	2.44	5.42	6.37	7.83	10.0	8.64	11.3
EPS Growth	%		+69.6	+121.9	+17.7	+22.8	+58.1	+10.4	+30.3	
PE Ratio	x					20.2	15.8	18.3	14.0	
PEG	x					1.94	1.52	0.61	0.91	
Profitability										
Operating Margin	%	-34.7	-2.0	-1.2	6.8	11.5	10.9	15.3		-1.5%
ROA	%	-1.0	-0.6	8.5	12.9	12.1	15.9			
ROCE	%	-40.0	-4.1	-3.0	12.6	16.5	15.3	19.9		-0.5%
ROE	%	-1.6	-1.0	13.2	17.6	16.1	22.0			+8.9%
Cashflow										
Op. Cashflow ps	p	-0.31	-4.65	26.5	11.9	13.6	12.1	13.3		
Capex ps	p	4.47	5.10	4.95	4.30	5.63	4.65	3.84		+0.8%
Free Cashflow ps	p	-4.78	-9.75	21.6	7.65	8.01	7.47	9.46		
Dividends										
Last ex-div: 3rd Sep, paid: 17th Sep <a href="#">more...</a>										
Dividend ps	p			2.00	3.00	3.45	5.00	5.12	5.38	5.93
Dividend Growth	%			+50.0	+15.0	+44.9	+42.1	+7.50	+10.2	
Dividend Yield	%					3.16	3.24	3.40	3.75	
Dividend Cover	x			-0.20	1.80	2.27	1.52	2.20	1.61	1.90
Balance Sheet										
Cash etc	£m	9.05	3.35	13.9	16.9	19.3	20.6	17.3		+17.8%
Working Capital	£m	15.0	13.5	14.6	17.6	19.9	20.9	16.7		+6.9%
Net Fixed Assets	£m	2.04	1.94	1.51	1.39	1.21	1.16	1.11		-10.6%
Net Debt	£m	-9.03	-3.35	-13.9	-16.9	-19.3	-20.6	-17.3		
Book Value	£m	21.9	21.8	20.6	22.4	24.9	25.8	28.5		+3.3%
Average Shares	m	54.6	56.4	54.0	52.6	53.2	53.4	53.3		-0.5%
Book Value ps	p	37.9	37.7	37.5	40.8	45.3	48.1	52.6		+4.9%

### Health Trend



### Bankruptcy Risk



### Earnings Manipulation Risk

Low

### Magic Formula Score

588 82% A-

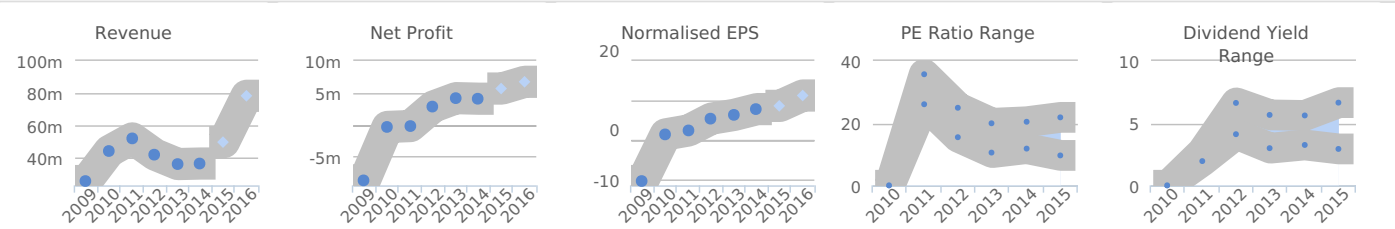
### Other Ratios

Leverage (ttm)	total	ex intang
Gross Gearing	% 0.000	0.000
Net Gearing	% -60.8	-100.4
Cash / Assets	% 42.9	
Liquidity (ttm)		Efficiency (ttm)
Curr. Ratio	2.47	Asset Turnover 1.00
Quick Ratio	2.35	Rec's Turnover 4.74
Interest Cov.	100.0	Stock Turnover 11.0

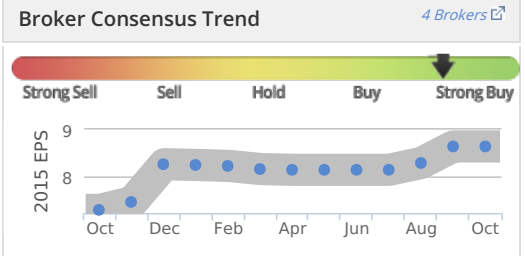
### Recent History

Latest interim period (ended 31st May '15) vs. prior year			
Sales Growth	9.28	%	
EPS Growth	67.7	%	
3yr Compound Annual Growth Rate			
Sales Growth	-11.3	%	
EPS Growth	47.5	%	
DPS Growth	35.7	%	

### Graphical History Current Fiscal Year 2015



Broker Forecasts				30th Nov 2015			30th Nov 2016		
Price Target: 2.07 (+30.91% above Price)	Net Profit	EPS	DPS	Net Profit	EPS	DPS			
Est. Long Term Growth Rate: n/a	(£)	(p)	(p)	(£)	(p)	(p)			
<b>Consensus Estimate</b>	<b>5.67m</b>	<b>8.64</b>	<b>5.38</b>	<b>6.73m</b>	<b>11.3</b>	<b>5.93</b>			
<b>1m Change</b>	<b>-433k</b>	-	-	<b>+358k</b>	-	<b>+0.013</b>			
<b>3m Change</b>	<b>+1.27m</b>	<b>+0.50</b>	-	<b>+1.93m</b>	<b>+2.28</b>	<b>-0.013</b>			



## Profile Summary



Amino Technologies Plc is a United Kingdom-based company engaged in IPTV (Internet Protocol Television) software technologies and hardware platforms that enable delivery of digital programming and interactivity over Internet Protocol (IP) networks. The Company develops a range of products and solutions designed to help broadband network operators deliver entertainment and associated connected home services to the consumer. It is focused on IPTV, which is the delivery of entertainment services to the Television (TV) over broadband networks that are managed by the operator. The Company's solutions are deployed by network operators and service providers across the world. It has approximately 850 customers in 85 countries. The Company's subsidiaries include Amino Holdings Limited, Amino Communications Limited, Amino Communications LLC, Amino Communications Employee Benefit Trust and AssetHouse Technology Limited, among others.

**Directors:** Donald McGarva (CEO), Julia Hubbard (CFO), Thomas Todd (NEC), Michael Bennett (NED), Peter Murphy (NID), Colin Smithers (NID),

**No. of Employees:** 107

**No. of Shareholders:** n/a

**Last Annual** November 30th, 2014  
**Last Interim** May 31st, 2015

**Incorporated** March 24, 2004  
**Public Since** June 9, 2004

**Shares in Issue** 70,267,845  
**Free Float** 62.4m (88.8%)

**Sector** Technology  
**Industry** Communications & Networking  
**Index** FTSE Intl-aim All Share,  
**Exchange** London Stock Exchange (AIM)  
**Eligible for** an ISA? ✓ a SIPP? ✓



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**Auditors** Grant Thornton UK LLP

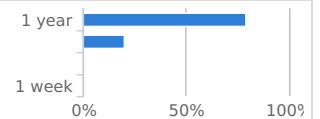
## AMOQuote

**AMO Share Price** Day's Change  
GBp  
**156.15p**  
▼ -1.8 -1.2%

Traded 1:47pm · Minimum 15 min delayed · NMS: 3.00k

**Volume** 116,265  
**Bid - Ask** 156.0 - 160.0  
**Low - High** 156.0 - 156.0  
**Spread** 256bps  
**Avg Vol (3m)** 66,311  
**Open - Close** 158.0 - 158.0  
**12m Range** 126.0 - 164.0  
**Beta** 0.43

## AMO Share Price Performance



## Latest AMO News Announcements (delayed)

[More »](#)

22nd Sep	<a href="#">Contract Win</a>
1st Sep	<a href="#">Contract Win</a>
12th Aug	<a href="#">Holding(s) in Company</a>
12th Aug	<a href="#">Completion of Acquisition of Entone Inc.</a>
10th Aug	<a href="#">Result of General Meeting</a>

## Upcoming AMO Events

Recent ↓

## Industry Peer Group

	<b>Newmark Security</b> <a href="#">Compare vs AMO</a>
	<b>Global Invacom</b> <a href="#">Compare vs AMO</a>
	<b>Synectics</b> <a href="#">Compare vs AMO</a>
	<b>Software Radio Tec...</b>
	<b>Digital Barriers</b> <a href="#">Compare vs AMO</a>
	<b>Vislink</b> <a href="#">Compare vs AMO</a>
	<b>Trakm8 Holdings</b> <a href="#">Compare vs AMO</a>
	<b>CityFibre Infrastr...</b> <a href="#">Compare vs AMO</a>

[Technology](#)

[Communications & Networking](#)

