

T.Clarke CTO – Tclarke
148.75p ↓ -2.25 -1.49%
 UK EMS: 5k

Market Cap £66.36m
 Enterprise Value £63.96m
 Revenue £327.10m
 Position in Market 1071st / 1,798

Quality 41
 Value 75
 Momentum 80
 StockRank™ 74

Industrials · Adventurous · Small Cap · Turnaround



Momentum

Relative Strength (%)	
1m	-6.28%
3m	+7.84%
6m	-7.76%
1y	+4.78%
Volume Change (%)	
10d / 3m	+16.4%
Price vs... (%)	
52w High	-18.8%
50d MA	+2.12%
200d MA	-0.717%

Growth & Value

12m Forecast Rolling		Industry	Market
PE Ratio (f)	6.7	<div style="width: 100%;"></div>	<div style="width: 100%;"></div>
PEG Ratio (f)	0.3	<div style="width: 100%;"></div>	<div style="width: 100%;"></div>
EPS Growth (f)	35.0%	<div style="width: 100%;"></div>	<div style="width: 100%;"></div>
Dividend Yield (f)	3.44%	<div style="width: 50%;"></div>	<div style="width: 50%;"></div>
Valuation (ttm)		Industry	Market
Price to Book Value	2.50	<div style="width: 50%;"></div>	<div style="width: 50%;"></div>
Price to Tang. Book	55.30	<div style="width: 10%;"></div>	<div style="width: 10%;"></div>
Price to Free Cashflow	n/a	<div style="width: 10%;"></div>	<div style="width: 10%;"></div>
Price to Sales	0.20	<div style="width: 100%;"></div>	<div style="width: 100%;"></div>
EV to EBITDA	5.92	<div style="width: 50%;"></div>	<div style="width: 50%;"></div>

Shareholder Activity

Buy / Hold / Sell	
Institutions	<div style="width: 80%;"></div>
Directors	<div style="width: 10%;"></div>
Community	<div style="width: 20%;"></div>

Screens Passed: 2 Long

CTO qualifies for **Tiny Titans** (Momentum Investing)
[View Screen](#) [View Checklists](#)

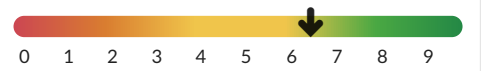
Quality

		Industry	Market
Return on Capital	16.5%	<div style="width: 100%;"></div>	<div style="width: 100%;"></div>
Return on Equity	29.9%	<div style="width: 100%;"></div>	<div style="width: 100%;"></div>
Operating Margin	2.69%	<div style="width: 50%;"></div>	<div style="width: 50%;"></div>

Financial Summary

Year End 31st Dec	2016	2017	2018	2019	2020	2021	2022E	2023E	CAGR / Avg	
Total Revenue	£m	279	311	327	335	232	327	410	500	3.26%
Operating Profit	£m	4.40	7.90	8.60	10.0	2.10	8.80			14.9%
Net Profit	£m	2.40	5.60	6.20	7.80	1.20	6.30	8.90	10.4	21.3%
EPS Reported	p	6.73	13.2	14.5	17.6	2.69	13.9			15.6%
EPS Normalised	p	13.0	10.8	14.5	17.6	12.7	13.9	21.1	24.6	1.37%
EPS Growth	%	+81.0	-16.7	+34.3	+21.1	-28.0	+9.70	+51.7	+16.6	
PE Ratio	x					10.9	7.16	6.14		
PEG						0.210	0.431			
Profitability										
Operating Margin	%	1.58	2.54	2.63	2.99	0.906	2.69			2.22%
ROA	%		4.20	4.32	5.56	0.845	4.00			
ROCE	%	11.7	17.6	19.1	18.6	4.14	16.5			14.6%
ROE	%		36.7	32.2	34.7	6.22	29.9			27.9%
Cashflow										
Op. Cashflow ps	p	9.28	16.0	8.21	8.81	8.21	-1.32			
Capex ps	p	0.464	4.47	1.17	0.678	0.444	0.878			13.6%
Free Cashflow ps	p	8.82	11.5	7.04	8.13	7.77	-2.20			
Dividends Ex-date: 21 Apr / Paid: 20 May										
Dividend ps	p	3.20	3.50	4.00	4.40	4.40	4.85	5.10	5.35	8.67%
Dividend Growth	%	+3.23	+9.38	+14.3	+10.0	0.000	+10.2	+5.15	+4.90	
Dividend Yield	%					3.21	3.38	3.54		
Dividend Cover	x	2.10	3.77	3.64	4.00	0.611	2.87	4.14	4.60	
Balance Sheet										
Cash etc	£m	12.3	16.7	12.4	12.4	25.2	20.3			10.5%

Health Trend (F-Score)



Bankruptcy Risk (Z2-Score)



Earnings Manipulation Risk (M-Score)

High

Other Ratios

Leverage (ttm)	Total	- Intang	+ Pension
Gross Gearing %	67.5	1,491.7	157.7
Net Gearing %	-9.06	-200.00	81.1
Cash / Assets %	12.00		14.0
Liquidity (ttm)			
Curr. Ratio			1.08
Quick Ratio			1.08
Interest Cov.			14.67
Efficiency (ttm)			
Asset Turnover			2.03
Recs Turnover			15.76
Stock Turnover			716.50

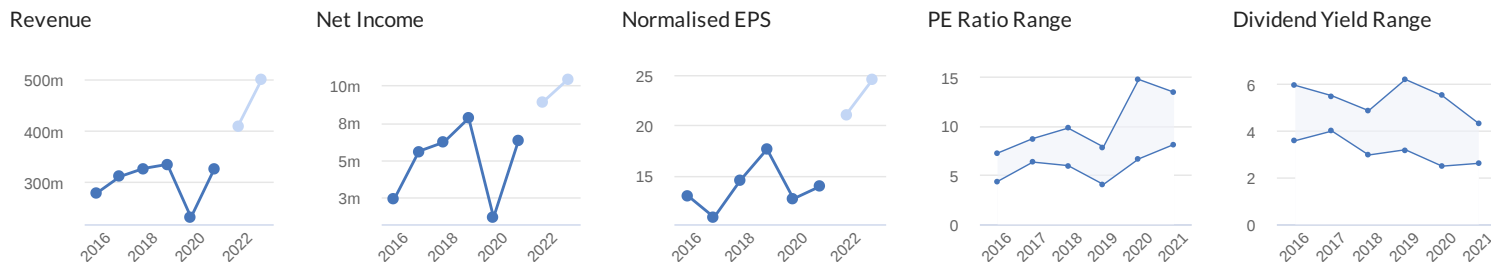
Working Capital	£m	7.70	10.8	10.6	9.50	7.60	9.30		3.85%
Net Debt	£m	-9.20	-11.6	-12.4	-8.20	-6.70	-2.40		
Net Fixed Assets	£m	7.20	8.70	8.80	18.8	17.8	18.8		21.2%
Book Value	£m	14.1	16.4	22.1	22.9	15.7	26.5		13.5%
Average Shares	m	43	42	43	44	45	46		1%
Book Value ps	p	33.7	39.2	51.6	53.2	36.5	60.4		12.4%

FINANCIAL BRIEF: For the fiscal year ended 31 December 2021, Tclarke PLC revenues increased 41% to £327.1M. Net income... [See more](#)

Recent History

Latest interim period vs. prior period		Industry	Market
Sales Growth	50.16%	<div style="width: 50%;"></div>	<div style="width: 50%;"></div>
EPS Growth	57.8%	<div style="width: 58%;"></div>	<div style="width: 58%;"></div>
3yr Compound Annual Growth Rate		Industry	Market
Sales CAGR	0.03%	<div style="width: 3%;"></div>	<div style="width: 3%;"></div>
EPS CAGR	-1.48%	<div style="width: -15%;"></div>	<div style="width: -15%;"></div>
DPS CAGR	6.63%	<div style="width: 66%;"></div>	<div style="width: 66%;"></div>

Graphical History



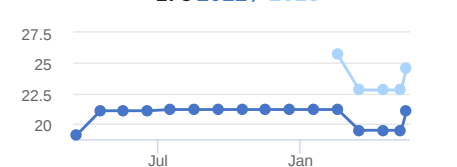
Analyst Forecasts

Price Target: (0.00% below Price)	31st Dec 2022			31st Dec 2023		
	Net Profit (£)	EPS (p)	DPS (p)	Net Profit (£)	EPS (p)	DPS (p)
Est. Long Term Growth Rate:						
Consensus Estimate	8.90m	21.1	5.1	10.40m	24.6	5.4
1m Change		+1.6	0.0		+1.8	0.0
3m Change		-0.1	+0.4		-1.1	+0.4

Analyst Consensus



EPS 2022 / 2023



Profile Summary

TClarke plc is a United Kingdom-based company engaged in the designing, installation, integration and maintenance of the digital, mechanical and electrical technologies and infrastructures. The Company provides resource of engineering services and digital capabilities, to help its customers deliv... [Read more](#)

Directors

- Mark Lawrence CEO (54)
- Michael Crowder MDR (57)
- Iain McCusker NEC (70)
- Peter Maskell NID (64)
- Trevor Mitchell FID (61)
- Aysegul Sabanci NID
- Jonathan Hook NID

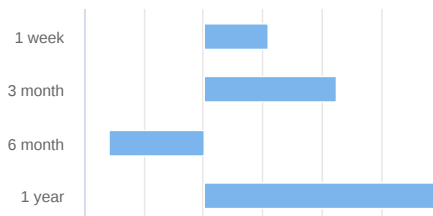
Last Annual	Dec 31, 2021
Last Interim	Dec 31, 2021
Incorporated	Dec 23, 1911
Public Since	Jan 9, 1986
Ex-Dividend Date	Apr 21, 2022
Payment Date	May 20, 2022
No. of Employees	1,236
No. of Shareholders	989

Sector	Industrials
Industry	Construction & Engineering
Index	FTSE Fledgling Index, FTSE Fledgling Ex Investment Trusts Index
Exchange	LSE Main Market
Asset Category	Common Stock
Shares in Issue	43,947,033
Free Float	25,928,311 (59%)
Eligible for	<div style="display: flex; gap: 5px;"> <div style="background-color: #28a745; color: white; padding: 2px 5px; border-radius: 10px;">✓ ISAs</div> <div style="background-color: #28a745; color: white; padding: 2px 5px; border-radius: 10px;">✓ SIPPs</div> </div>

Address	45 Moorfields, LONDON, EC2Y 9AE, United Kingdom
Web	http://www.tclarke.co.uk/
Phone	+442079977400
Auditors	PricewaterhouseCoopers LLP

CTO Share Price Performance

Share Price	Volume	Bid - Ask	Low - High	Spread
148.75p	2,000	147.50p - 150.00p	0.00p - 0.00p	201bps
Day's Change	Avg Volume	Open - Close	Range (12m)	Beta
↓ -2.25 -1.49%	65,357	0.00p - 148.75p	112.50p - 186.00p	1.221



Latest News for CTO

- 6:00 am

RCS - TClarke PLC - TClarke to Present at Mello Investor Conference

Wed, May 11, 2022

TClarke PLC - Result of AGM

Wed, May 11, 2022

TClarke PLC - AGM Statement

May 10, 2022

TClarke PLC - ESOT Share Purchase

May 5, 2022

TClarke PLC - ESOT Share Purchase

Announcement
Announcement
Announcement
Announcement
Announcement

Upcoming Events for CTO

- Monday, July 18th 2022

Half Year 2022 Tclarke PLC Earnings Release

Similar to CTO

Compare

- Nakano**
Value Trap (31)
- Novac Co**
Neutral (13)
- Ambienthesis SpA**
Neutral (54)
- Orion group**
Value Trap (43)
- Sebino SpA**
Neutral (52)
- J Smart & Co (Contractors)**
Super Stock (87)
- Saunders International**
Super Stock (95)
- SRV Yhtiot Oyj**
Value Trap (34)

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