

SPA – 1Spatial
41.50p ↑ 2.00 +5.06%
 EMS: 3k

Market Cap £43.64m
 Enterprise Value £41.66m
 Revenue £27.03m
 Position in Market 1184th / 1,798

Quality 22
 Value 26
 Momentum 80
StockRank™ 36

Technology · Speculative · Micro Cap · Momentum Trap



Momentum

Relative Strength (%)	
1m	-0.117% ●
3m	-8.40% ●
6m	-16.2% ●
1y	-10.8% ●
Volume Change (%)	
10d / 3m	-0.367% ●
Price vs... (%)	
52w High	-28.1% ●
50d MA	+0.586% ●
200d MA	-7.79% ●

Growth & Value

12m Forecast Rolling		Industry	Market
PE Ratio (f)	19.2	■	■
PEG Ratio (f)	0.3	■	■
EPS Growth (f)	153.5%	■	■
Dividend Yield (f)	0.00%	■	■
Valuation (ttm)		Industry	Market
Price to Book Value	2.80	■	■
Price to Tang. Book	75.37	■	■
Price to Free Cashflow	n/a	■	■
Price to Sales	1.61	■	■
EV to EBITDA	10.80	■	■

Shareholder Activity

Buy / Hold / Sell	
Institutions	■
Directors	■
Community	■

Screens Passed: 0 Long 1 Short

SPA qualifies for **Altman Z-Score Screen** (Short Selling)
[View Screen](#) [View Checklists](#)

Quality

	Industry	Market
Return on Capital	2.1%	■
Return on Equity	1.1%	■
Operating Margin	1.54%	■

Financial Summary

Year End 31st Jan	2017	2018	2019	2020	2021	2022	2023E	2024E	CAGR / Avg	
Total Revenue	£m	15.1	16.9	17.6	23.4	24.6	27.0	30.5	32.1	12.3%
Operating Profit	£m	-15.6	-1.80	-1.63	-1.54	-1.25	0.415			
Net Profit	£m	-18.4	-2.46	-1.70	-1.48	-1.12	0.177	0.886	1.34	
EPS Reported	p	-20.6	-1.58	-1.65	-1.37	-1.01	0.160			
EPS Normalised	p	-9.86	-0.370	-1.15	-0.603	-0.921	0.160	2.40	1.21	
EPS Growth	%						+1,399	-49.6		
PE Ratio	x						247	16.5	32.6	
PEG							0.176	0.366		
Profitability										
Operating Margin	%	-103	-10.7	-9.24	-6.58	-5.07	1.54			-22.2%
ROA	%		-5.63	-6.99	-5.26	-3.17	0.494			
ROCE	%	-152	-23.5	-11.6	-7.20	-5.72	2.05			-33.0%
ROE	%		-14.8	-13.7	-10.0	-7.22	1.15			-8.92%
Cashflow										
Op. Cashflow ps	p	-1.10	1.09	-0.595	0.683	3.83	2.30			
Capex ps	p	5.66	1.47	1.61	2.14	2.07	2.36			-16.0%
Free Cashflow ps	p	-6.76	-0.377	-2.21	-1.46	1.77	-0.067			
Dividends										
Dividend ps	p	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	
Dividend Growth	%									
Dividend Yield	%						0.000	0.000		
Dividend Cover	x									
Balance Sheet										
Cash etc	£m	1.29	1.32	6.36	5.11	7.28	5.62			34.3%

Health Trend (F-Score) 7/9

Bankruptcy Risk (Z2-Score) -0.23

Earnings Manipulation Risk (M-Score) High

Other Ratios

Leverage (ttm)	Total	- Intang	+ Pension
Gross Gearing %	26.4	710.9	34.6
Net Gearing %	-9.67	-260.28	-1.5
Cash / Assets %	16.01		16.6
Liquidity (ttm)			
Curr. Ratio		1.21	●
Quick Ratio		1.21	●
Interest Cov.		2.13	●
Efficiency (ttm)			
Asset Turnover		0.80	
Recs Turnover		3.04	
Stock Turnover		n/a	

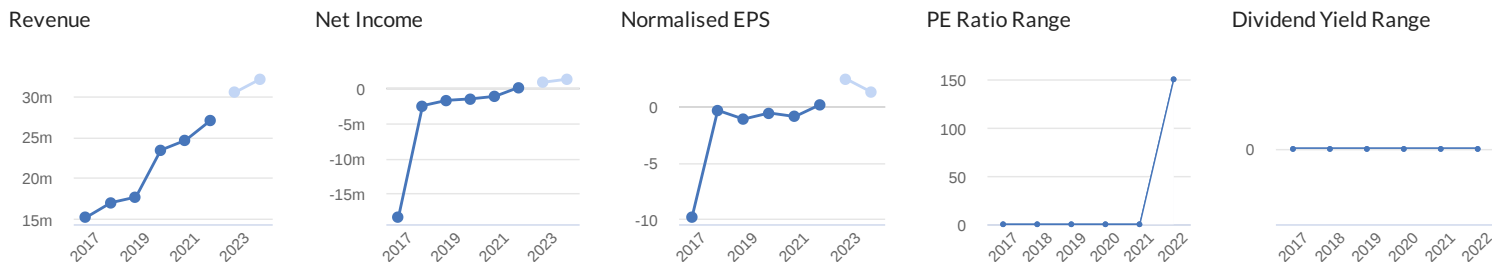
Working Capital	£m	-2.71	-3.18	3.58	2.14	3.52	3.12	
Net Debt	£m	-0.540	-0.268	-6.36	-0.590	-1.60	-1.51	
Net Fixed Assets	£m	1.06	0.333	0.285	3.65	3.09	2.10	14.7%
Book Value	£m	8.96	7.27	13.7	15.9	15.2	15.6	11.7%
Average Shares	m	73	76	86	108	112	111	9%
Book Value ps	p	12.2	9.56	13.8	14.4	13.8	14.1	2.96%

FINANCIAL BRIEF: For the fiscal year ended 31 January 2022, 1Spatial PLC revenues increased 10% to £27M. Net income totalled... [See more](#)

Recent History

Latest interim period vs. prior period	Industry	Market
Sales Growth	11.78%	
EPS Growth	n/a	
3yr Compound Annual Growth Rate	Industry	Market
Sales CAGR	15.32%	
EPS CAGR	n/a	
DPS CAGR	n/a	

Graphical History



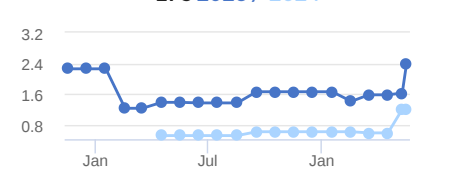
Analyst Forecasts

Price Target: 80.00p (102.53% above Price)	31st Jan 2023			31st Jan 2024		
Est. Long Term Growth Rate:	Net Profit (£)	EPS (p)	DPS (p)	Net Profit (£)	EPS (p)	DPS (p)
Consensus Estimate	886.00k	2.4	0.0	1.34m	1.2	0.0
1m Change	+549.00k	+0.8		+604.00k	+0.6	
3m Change	+522.00k	+1.0		+612.00k	+0.6	

Analyst Consensus



EPS 2023 / 2024



Profile Summary

1Spatial plc is a United Kingdom-based holding company. The Company's principal activity is the development and distribution of software solutions along with associated consultancy and support related to Location Master Data Management (LMDM). The Company's products include 1Integrate, 1Data Gate... [Read more](#)

Directors

- Claire Milverton CEO (47)
- Andrew Roberts NEC (67)
- Francis Small NED
- Peter Massey NED
- Andrew Fabian CFO (59)
- Susan Wallace SEC

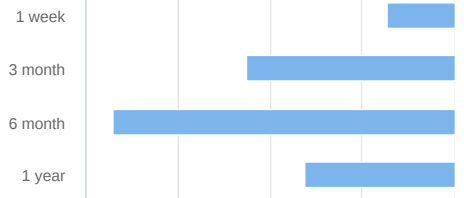
Last Annual	Jan 31, 2022
Last Interim	Jan 31, 2022
Incorporated	Apr 20, 2005
Public Since	Jun 21, 2005
Ex-Dividend Date	
Payment Date	
No. of Employees	286
No. of Shareholders	0

Sector	Technology
Industry	Software & IT Services
Index	FTSE AIM All Share Index
Exchange	LSE AIM Market
Asset Category	Common Stock
Shares in Issue	110,486,160
Free Float	87,338,151 (79.05%)
Eligible for	<input checked="" type="checkbox"/> ISAs <input checked="" type="checkbox"/> SIPPs

Address	Tennyson House, CAMBRIDGE, CB4 0WZ, United Kingdom
Web	https://www.1spatial.com/
Phone	+441223420414
Auditors	BDO LLP

SPA Share Price Performance

Share Price	Volume	Bid - Ask	Low - High	Spread
41.50p	95,896	40.00p - 43.00p	0.00p - 0.00p	759bps
Day's Change	Avg Volume	Open - Close	Range (12m)	Beta
↑ 2.00 +5.06%	69,836	39.50p - 41.50p	34.10p - 54.90p	0.816



Latest News for SPA

- Yesterday 6:00 am

1Spatial Plc - Attendance at the Mello Investor Conference

Wed, May 11, 2022

BRIEF-1Spatial Announces \$1.4 Mln Expansion Contract With State Of California

Wed, May 11, 2022

1Spatial Plc - \$1.4m expansion contract with State of California

Apr 27, 2022

1Spatial Plc - Final Results

Apr 6, 2022

1Spatial Plc - Notice of Results and Investor Presentation

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Neutral 59
- IP PLUS PCI- PAL
Sucker Stock 15
- QUORUM INFORMATION TECHNOLOGIES Quorum Information Technologies
Super Stock 82
- TEKCAPITAL Tekcapital
Neutral 91

Upcoming Events for SPA

- Thursday, May 26th 2022

1Spatial PLC Mello Investor Conference
- Thursday, June 23rd 2022

1Spatial PLC Annual Shareholders Meeting
- Tuesday, September 27th 2022

Half Year 2023 1Spatial PLC Earnings Release

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