

Cosmo Ferrites Ltd.

Engineering | Electronic Components

Snapshot

BSE Price	Change 1 Day	P/E	P/E	Dividend Yield
R5.69	R0.27 4.98%	--	0.50	0.00%

As on 06-Aug-2020

Detailed Quotes

Exchange & Time	Last Price	1 Day Change (%)	Open	Prev Close	Volume	1-Day Range
BSE 06-Aug-2020	5.69	4.98	5.69	5.42	1,665	5.69 - 5.69

About The Company

Business: Manufacture of other electronic components n.e.c

Incorporated: 1985

Chairman: Ambrish Jaipuria

Managing Director: --

Group: Cosmo

Listing: BSE: 523100

Headquarters: Solan Dist, Himachal Pradesh

Website: www.cosmoferrites.com

Key Facts

Market Cap: R 6.85 Cr

Revenue (TTM): R 55.01 Cr

Earnings (TTM): R -10.03 Cr

Cash: R 1.22 Cr

Total Debt: R 39.54 Cr

Promoters' Ownership: 63.49%

Liquidity: Low

52 Week Range: R 3.00 - 9.66

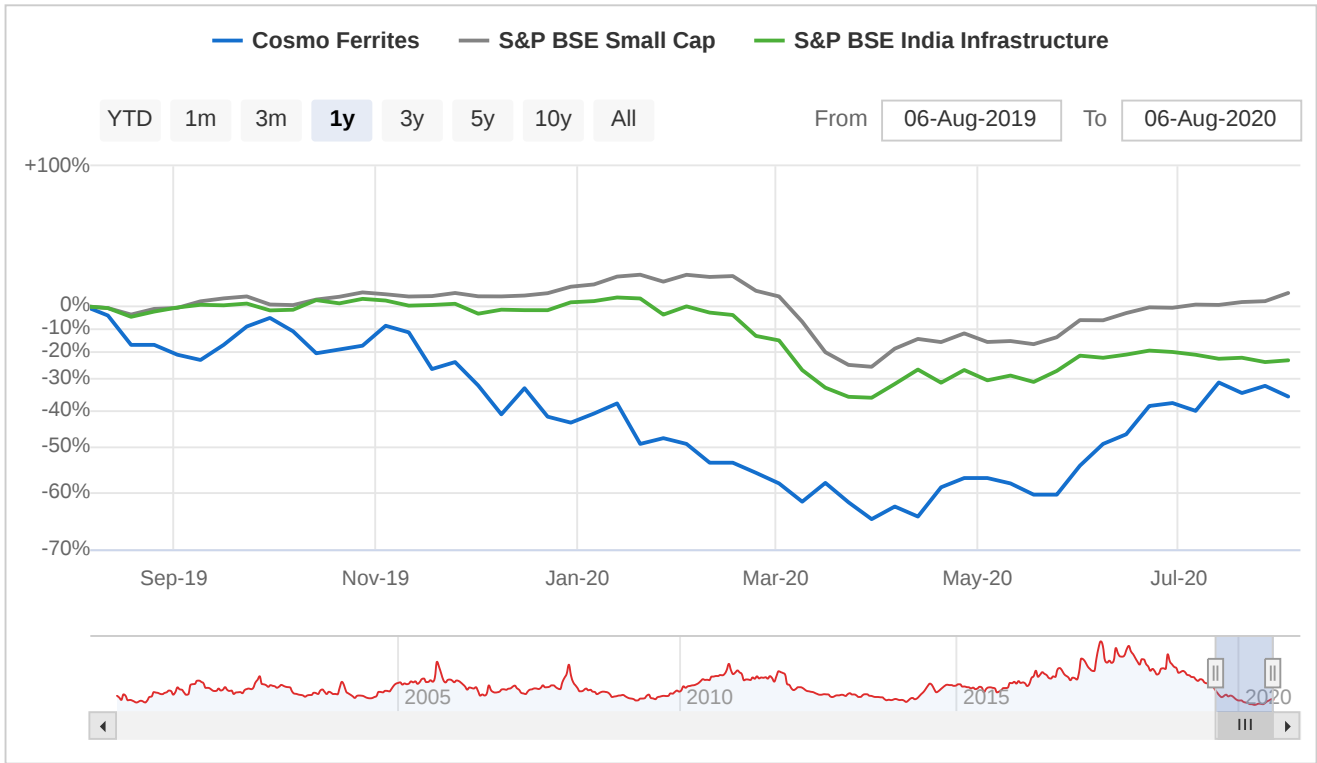
Face Value: R10.00

Shares Outstanding: 1,20,30,000

10 Years Aggregate:

- **CFO:** 22.27 Cr
- **EBITDA:** 47.84 Cr
- **Net Profit:** -7.29 Cr

Price Graph



Stock Performance

Trailing (%)

Annual (%)

Time Period	Cosmo Ferrites	S&P BSE India Infrastructure	S&P BSE Small Cap	Year	Cosmo Ferrites	S&P BSE Small Cap	S&P BSE India Infrastructure
YTD	5.24	-23.21	-1.97	2019	-72.24	-6.85	-11.27
1 month	-1.63	-4.45	6.56	2018	-34.26	-23.41	-21.27
3 months	49.72	9.08	26.10	2017	96.67	59.64	35.22
1 Year	-42.95	-22.92	9.32	2016	4.24	1.77	11.78
3 Years	-42.80	-16.07	-5.52	2015	0.22	6.76	-8.60
5 Years	-14.72	-5.54	2.04	2014	122.69	69.24	--
10 Years	-10.80	--	3.45	2013	-37.35	-11.23	--

As on 05-Aug-2020

Essential Checks

Altman Z-Score 0.52

Piotroski F-Score 4

Modified C-Score 3

Is there a threat to this company's solvency in the future?

Very Likely



How well has this company done in the past one year?

Below Average



Can creative accounting be detected through the financial numbers?

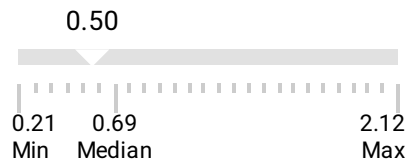
No



Price to Earnings



Price to Book



Earnings Yield -12.93%

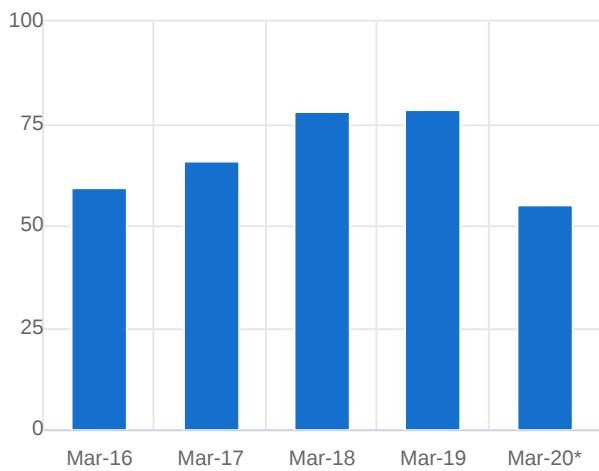
EBIT/Enterprise value

PEG --

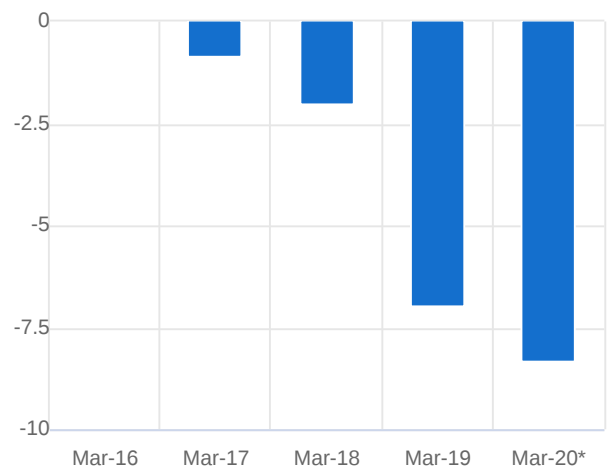
Price/ Earnings to growth ratio

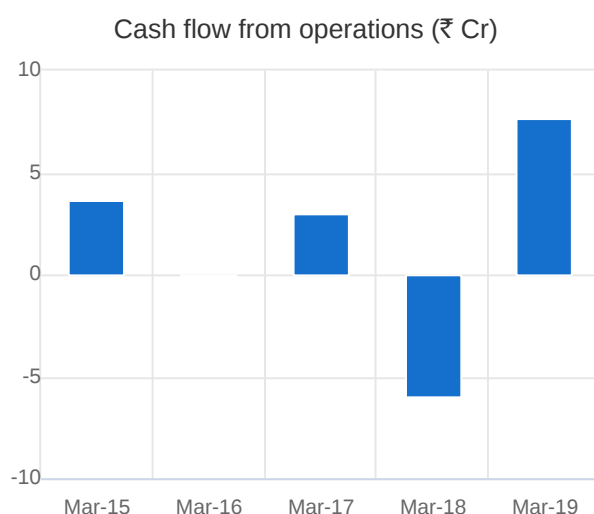
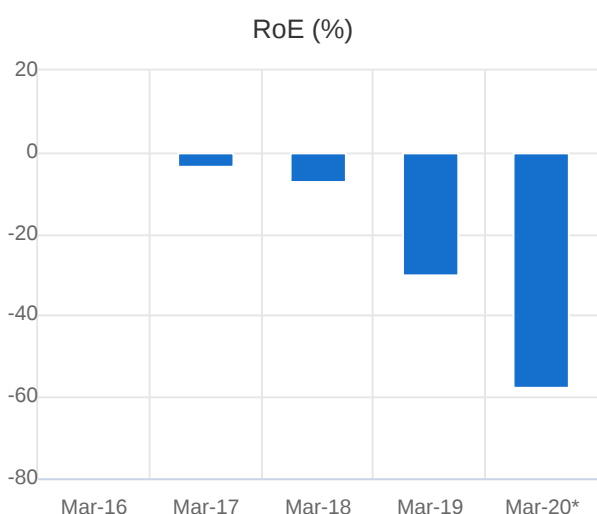
Key Ratios

Revenue (₹ Cr)



EPS (₹)





*TTM (Trailing Twelve Months) data based on income statement of last 4 quarters and interim half yearly balance sheet.

Key Ratios and Highlights

Growth (%)	Quarterly		Annual (TTM)			
	Annual (TTM)	QoQ	YoY	1-Year	3-Years	5-Years
Revenue		-24.24	-44.78	-29.85	-7.95	-0.08
Operating Profit		-85.34	-557.45	-166.77	-168.94	-187.91
Net Profit		-17.79	-161.22	-20.26	-301.09	-231.75
EPS		-17.79	-161.23	-20.27	-301.08	-231.75
Book Value		--	--	-25.65	4.03	0.65

Key Ratios (%)	Average		Annual (TTM)			
	Particulars	3-Year	5-Years	TTM	20190301	20180301
Operating Margin		5.64	7.00	-3.80	3.98	3.30
Net Margin		-4.99	-3.60	-17.91	-10.46	-3.02
Return on Equity		-13.58	-9.66	-57.79	-29.91	-7.24
Return on Capital		-2.48	-0.25	--	-9.04	-2.36
Debt to Equity (x)		--	--	0.43	1.66	1.39

Financials

Annual Standalone

	TTM	Mar-19	Mar-18	Mar-17	Mar-16	Mar-15	Mar-14	Mar-13
Income Statement (R Cr)								
Operating Revenue	55.01	78.42	78.21	66.10	59.46	54.09		
Other Income	0.98	1.36	1.29	0.70	0.92	1.14		
Total Income	55.99	79.78	79.50	66.80	60.39	55.23		
Total Expenditure	58.08	76.66	76.91	60.42	54.03	51.25		
Increase/Decrease in Stock	--	-0.92	0.24	-0.41	-0.55	-1.25		
Raw Material Consumed	--	31.00	27.53	19.62	17.05	15.74		
Power & Fuel Cost	--	9.12	9.31	8.10	7.79	8.06		
Employee Cost	--	19.51	20.39	15.23	14.06	11.88		
Other Manufacturing Expenses	--	11.57	13.02	11.21	9.45	9.72		
General and Administration Expenses	--	3.76	3.90	2.57	2.62	3.12		
Selling and Distribution Expenses	--	0.80	0.50	2.46	2.21	2.14		
Miscellaneous Expenses	--	1.82	2.03	1.64	1.40	1.84		
Operating Profit	-2.09	3.12	2.58	6.38	6.36	3.98		
Interest	4.18	5.14	5.14	3.77	2.62	2.74		
PBDT	-6.27	-2.02	-2.56	2.62	3.74	1.24		
Depreciation	3.75	4.14	4.30	3.99	3.69	3.61		
PBT & Exceptional Items	-10.02	-6.16	-6.86	-1.38	0.05	-2.37		
Exceptional Items	-0.02	-5.30	--	--	--	--		
Profit before Tax	-10.04	-11.46	-6.86	-1.38	0.05	-2.37		

Provision for Tax	-0.01	-3.11	-4.46	-0.38	0.05	-0.69
Profit after Tax	-10.03	-8.35	-2.40	-0.99	0.00	-1.68
Liabilities (R Cr)						
Shareholder's Funds	13.78	23.80	32.00	34.42	23.14	23.13
Share Capital	12.03	12.03	12.03	12.03	14.03	14.03
Share Warrants & Outstandings	--	--	--	--	--	--
Total Reserves	1.75	11.77	19.97	22.39	9.11	9.10
Minority Interest	--	--	--	--	--	--
Non-Current Liabilities	8.22	9.67	14.09	16.23	8.67	9.39
Long-Term Borrowings	5.86	7.57	9.03	7.07	3.16	3.97
Deferred Tax/Payment Liabilities	--	--	3.06	7.52	4.21	4.19
Other Long Term Liabilities	0.03	0.03	0.05	0.04	0.04	0.03
Long Term Trade Payables	--	--	--	--	--	--
Long Term Provisions	2.33	2.06	1.96	1.60	1.26	1.21
Current Liabilities	56.66	56.56	56.25	40.68	36.05	30.66
Short Term Borrowings	34.00	28.62	32.20	24.24	23.09	19.16
Trade Payables	--	18.21	15.96	9.12	6.80	6.63
Other Current Liabilities	--	9.52	7.78	7.10	5.90	4.68
Short Term Provisions	0.22	0.22	0.31	0.23	0.26	0.20
Total Liabilities	78.66	90.02	102.35	91.33	67.85	63.19

Assets (R Cr)						
Non-Current Assets	56.86	60.52	64.98	64.21	41.33	41.27
Fixed Assets	56.86	59.98	64.04	63.46	40.74	34.84
Capital Work in Progress	--	0.01	0.24	0.08	0.08	5.94
Non Current Investments	--	--	--	--	--	--
Long Term Loans & Advances	--	0.50	0.68	0.67	0.50	0.48
Other Non Current Assets	0.53	0.02	0.02	0.00	--	--
Current Assets	21.27	29.50	37.37	27.12	26.53	21.92
Inventories	9.97	12.47	12.33	11.14	9.67	8.07
Currents Investments	--	--	--	--	--	--
Cash and Bank	1.53	1.22	1.35	2.56	3.00	2.84
Trade Receivables	7.14	12.21	18.61	10.42	11.71	7.45
Short Term Loans and Advances	--	0.90	1.21	1.05	0.70	1.43
Other Current Assets	2.63	2.71	3.87	1.95	1.44	2.13
Total Assets	78.66	90.02	102.35	91.33	67.85	63.19
Total Debt*	--	39.54	44.40	34.57	28.41	24.47
Net Current Assets	-35.39	-27.06	-18.88	-13.57	-9.53	-8.74
Contingent Liabilities	--	2.48	2.66	4.10	3.32	2.39
Cashflow (R Cr)						
Cash From Operating Activities	--	7.65	-6.01	2.97	-0.06	3.63
Profit Before Tax	--	-11.46	-6.86	-1.38	0.05	-2.37

Adjustment	--	11.87	8.69	7.01	5.76	5.92
Changes In working Capital	--	11.71	-3.43	0.35	-4.31	2.30
Tax Paid	--	0.00	-0.01	0.07	0.51	-0.08
Cash Flow from Investing Activities	--	-2.95	-4.18	-6.80	-3.72	-10.40
Cash from Financing Activities	--	-4.87	9.84	4.36	3.94	7.79
Net Cash Inflow / Outflow	--	-0.16	-0.35	0.53	0.16	1.02
Ratios						
Financials						
Adjusted EPS (Rs)	-8.34	-6.94	-2.00	-0.83	0.00	-1.40
Cash EPS (Rs)	-8.34	-3.50	1.58	2.49	3.07	1.61
Adjusted Book Value (Rs)	11.45	19.78	26.60	28.61	17.57	17.57
Dividend per Share (Rs)	--	--	--	--	--	--
Cash Flow per Share (Rs)	--	6.36	-5.00	2.47	-0.05	3.01
Free Cash Flow per Share (Rs)	--	2.18	-5.47	-3.69	-3.61	-5.26
Profitability						
ROCE (%)	--	-9.04	-2.36	3.96	5.38	0.83
ROE (%)	-57.79	-29.91	-7.24	-3.58	0.02	-7.60
ROA (%)	-11.89	-8.68	-2.48	-1.25	0.00	-2.79
Operating Margin (%)	-3.80	3.98	3.30	9.65	10.69	7.36
Net Margin (%)	-17.91	-10.46	-3.02	-1.49	0.01	-3.04
Cash Profit Margin (%)	--	-5.37	2.39	4.25	5.83	3.40

Growth						
Revenue Growth (%)	-29.85	0.26	18.32	11.16	9.93	-4.72
Operating profit Growth (%)	-166.77	20.74	-59.52	0.34	59.76	-52.02
Net Profit Growth (%)	-20.26	-247.13	-142.07	--	100.19	-260.08
EPS Growth (%)	-20.27	-247.13	-142.07	--	100.19	-262.72
Book Value Growth (%)	--	-25.65	-7.02	62.85	0.02	-8.29
Solvency						
Debt to Equity	0.43	1.66	1.39	1.00	1.23	1.06
Short term debt to equity	2.47	120.27	100.62	70.42	99.82	82.82
Current Ratio	0.38	0.52	0.66	0.67	0.74	0.71
Quick Ratio	0.20	0.30	0.45	0.39	0.47	0.45
Interest Coverage	-1.40	-1.23	-0.33	0.63	1.02	0.13
Operating Efficiency						
Debtors to sales (%)	12.98	15.57	23.80	15.76	19.70	13.78
Asset Turnover	0.65	0.82	0.82	0.89	0.97	0.94
Receivable days	--	71.72	66.86	57.26	55.24	47.31
Inventory Days	--	57.72	54.06	53.85	51.13	51.94
Payable days	--	82.38	60.75	48.59	45.12	43.71
Cash Conversion Cycle	--	47.06	60.16	62.52	61.24	55.54
Valuation						
Price / Earnings	--	--	--	--	4,092.59	--

Price / Book Value	0.47	0.75	0.83	0.85	0.63	0.63
Dividend Yield (%)	--	--	--	--	--	--
EV/EBITDA	-21.46	18.00	26.92	9.63	6.40	9.26
Close Price (Rs)	3.10	14.80	22.00	24.45	11.05	11.00
High Price (Rs)	16.15	31.85	36.55	28.40	16.15	15.88
Low Price (Rs)	3.05	14.80	17.95	11.20	8.35	5.34
Market Cap (Rs Cr)	6.85	17.80	26.47	29.41	13.29	13.23

**TTM (Trailing Twelve Months) data based on income statement of last 4 quarters and interim half yearly balance sheet.*

Quarterly Standalone

	Mar-20	Dec-19	Sep-19	Jun-19	Mar-19	Dec-18	Sep-18	Jun-18
Income (R Cr)								
Revenue	9.78	12.91	15.00	17.32	17.71	16.51		
Other Income	0.20	0.16	0.21	0.41	0.33	0.39		
Total Income	9.98	13.07	15.21	17.73	18.04	16.90		
Total Expenditure	12.13	14.23	15.03	16.69	17.57	16.19		
Operating Profit	-2.15	-1.16	0.18	1.04	0.47	0.71		
Interest	0.70	1.17	1.16	1.15	1.31	1.04		
Exceptional Items	-0.02	--	--	--	-0.02	-5.28		
PBDT	-2.87	-2.33	-0.98	-0.11	-0.86	-5.61		
Depreciation	0.95	0.94	0.93	0.93	1.03	1.00		
PBT	-3.82	-3.27	-1.91	-1.04	-1.89	-6.61		
Tax	0.02	-0.01	-0.01	-0.01	-0.42	-1.90		
Profit after Tax	-3.84	-3.26	-1.90	-1.03	-1.47	-4.71		
Equity Capital	12.03	12.03	12.03	12.03	12.03	12.03		
Ratios (R Cr)								
Adjusted EPS (Rs.)	-3.19	-2.71	-1.58	-0.86	-1.22	-3.92		

Operating Margin (%)	-21.98	-8.99	1.20	6.00	2.65	4.30
Net Margin (%)	-38.48	-24.94	-12.49	-5.81	-8.15	-27.87

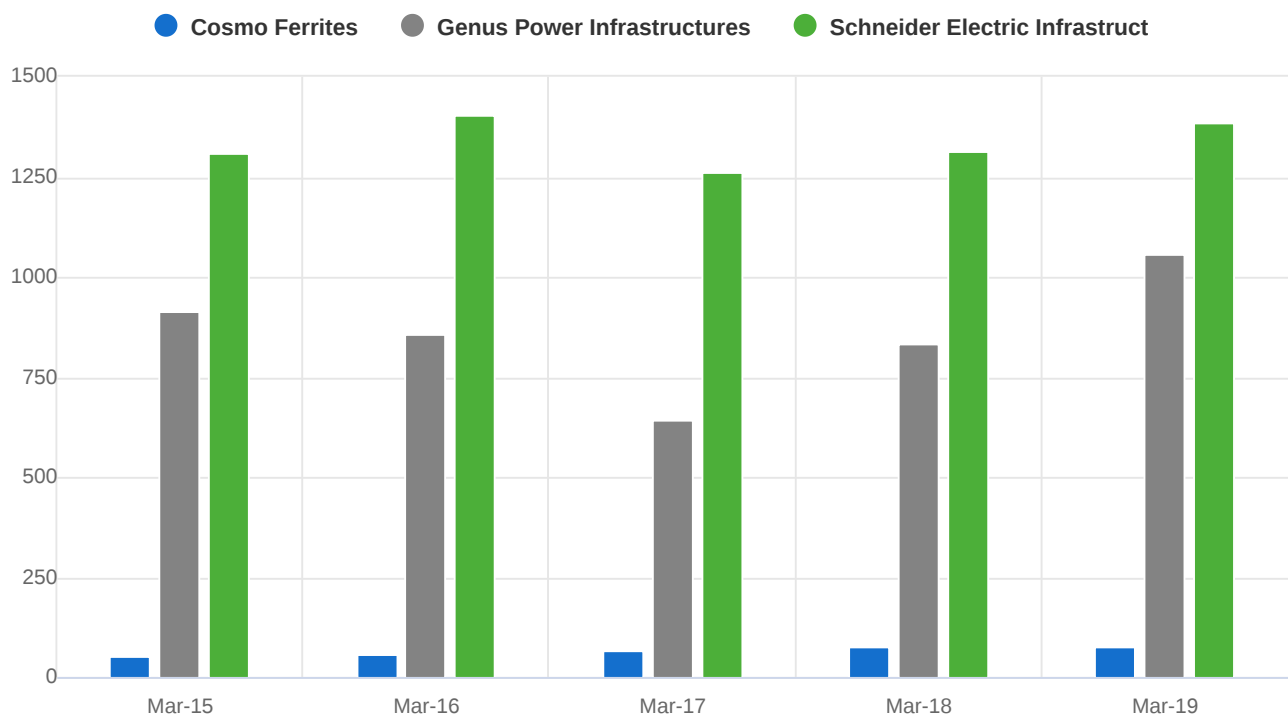
Peers

Financial Peer Chart

Chart for: **Operating Revenue**

Schneider Electric Infrastruc

Genus Power Infrastructures



Peer Comparison

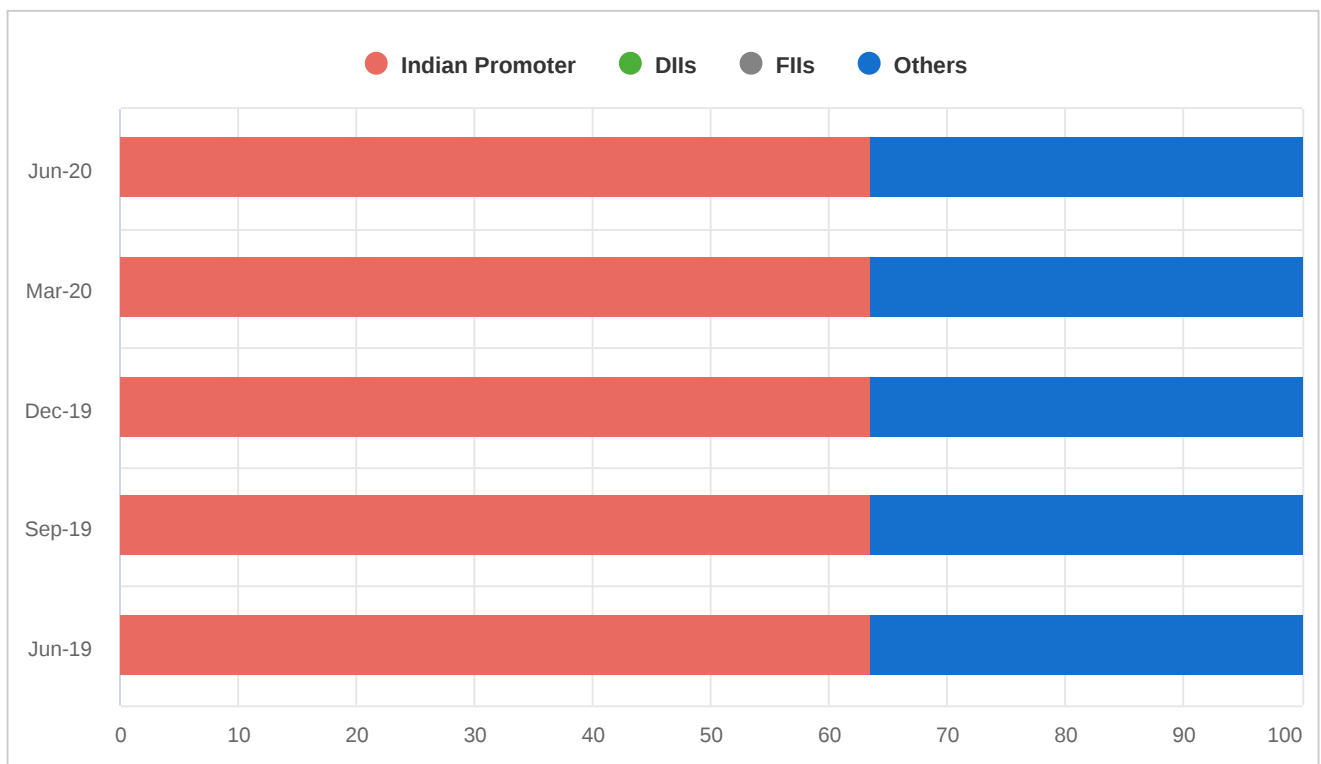
Company Name	Market cap (R Cr.)	Revenue (R Cr.)	Net Profit (R Cr.)	Net Margin (%)	RoE (%)	Price to Earnings	Price to Book
Cosmo Ferrites	7	55	-10.03	-17.91	-57.79	--	0.50
Centum Electronics	412	878	16.58	1.92	8.05	25.55	2.01 ×
Genus Power Infrastructures	642	876	72.01	7.91	8.74	9.04	0.75 ×
HBL Power Systems	409	1,092	25.18	2.27	3.27	15.60	0.53 ×

Company Name	Market cap (R Cr.)	Revenue (R Cr.)	Net Profit (R Cr.)	Net Margin (%)	RoE (%)	Price to Earnings	Price to Book
Schneider Electric Infrastruct	1,833	1,382	-29.57	-2.11	--	--	-296.40

+ Add Stock For Comparison

Ownership

Shareholding Pattern



Shareholders more than 1%

Company Name	Category	Jun-20	Mar-20	Dec-19	Sep-19
ANDHERI PROPERTIES & FINANCE LIMITED	Promoter	31.23	31.23	31.23	31.23
SUPER SADIQ ENTERPRISES PRIVATE LIMITED	Promoter	30.63	30.63	30.63	30.63
SANGEETHA S	Public	4.16	4.16	4.16	--
Devyani Enterprises Private Limited	Public	1.66	1.66	1.66	1.66

Company Name	Category	Jun-20	Mar-20	Dec-19	Sep-19
VEENA K JAGWANI	Public	1.21	1.21	1.21	1.21
Ambrish Jaipuria	Promoter	1.10	1.10	1.10	1.10
VINODKUMAR OHRI	Public	1.01	1.01	1.01	--

Insider Trades

Date	Person	Buy / Sell	Transaction Type	No. of Shares	Price (R)	Value (RLakhs)
07-Aug-2018	Ambrish Jaipuria	Buy	Off Market	79,900	20.55	16.42
07-Aug-2018	Ashok Jaipuria	Sell	Off Market	79,900	20.55	16.42
19-Jun-2012	Sunrise Manufacturing Co.Ltd.	Sell	Inter-Se Transfer	30,00,000	7.98	239.40
19-Jun-2012	Super Sadiq Enterprises Pvt.Ltd.	Buy	Inter-Se Transfer	30,00,000	7.98	239.40
29-Mar-2012	Andheri Properties & Finance Ltd.	Buy	Inter-Se Transfer	24,00,000	9.50	228.00