

MSM Malaysia Holdings Bhd. :5202-MY: Earnings Analysis: Q1, 2016 By the Numbers : May 25, 2016

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MSM Malaysia Holdings Bhd. reports financial results for the quarter ended March 31, 2016.

Highlights

- Summary numbers: Revenues of MYR 553.16 million, Net Earnings of MYR 59.34 million.
- Gross margins narrowed from 23.29% to 18.73% compared to the same period last year, operating (EBITDA) margins now 10.72% from 17.63%.
- Change in operating cash flow of 46.63% compared to same period last year is about the same as change in earnings, likely no significant movement in accruals or reserves.
- Narrowing of operating margins contributed to decline in earnings.

The table below shows the preliminary results and recent trends for key metrics such as revenues and net income growth:

	2015-03-31	2015-06-30	2015-09-30	2015-12-31	2016-03-31
Relevant Numbers (Quarterly)					
Revenues (mil)	508.49	588.32	546.49	663.97	553.16
Revenue Growth (%YOY)	2.05	-1.19	-2.37	5.72	8.79
Earnings (mil)	71.03	79.13	63.87	66.73	59.34
Earnings Growth (%YOY)	26.08	0.54	33.17	-10.99	-16.45
Net Margin (%)	13.97	13.45	11.69	10.05	10.73
EPS	0.1	0.11	0.09	0.09	0.08
Return on Equity (%)	14.35	15.78	12.6	13.03	11.5
Return on Assets (%)	11.63	13.09	10.07	10.03	8.65

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