

Glaxosmithkline Consumer Healthcare Ltd.

Key Takeaways

- Glaxosmithkline Consumer Healthcare Ltd reported revenues of Rs.758.4 crore in Q1FY13 v/s Rs.673.9 crore in Q1 FY12.
- EBITDA is Rs.139.4 crore in Q1 FY13 v/s Rs.119 crore in Q1 FY12.
- EBIDTA margins were 18.4% in Q1 FY13 v/s 17.7% in Q1 FY12.
- The company posted a net profit of Rs.106.6 crore in this quarter v/s Rs.82.5 crore YoY.
- PAT margins increased by 190 bps from 12.2% in Q1 FY12 to 14.1% in Q1 FY13.

Particulars	Q1 FY13	Q1 FY12	Y-o-Y	Q4 FY12	Q-o-Q
Net Sales (in Rs.Cr)	758.4	673.9	13%	836.4	-9%
EBIDTA (in Rs.Cr)	139.4	119.0	17%	185.1	-25%
EBIDTA Margin (%)	18.4	17.7	0.7	22.1	-3.8
PAT (in Rs.Cr)	106.6	82.5	29%	132.0	-19%
PAT Margin (%)	14.1	12.2	1.9	15.8	-1.7

Outlook: Very good results posted by the company.

Price Details

CMP	2631
Recommendation	BUY

Index Details

Sensex	17236
Nifty	5229
Industry	Packaged Food

Scrip Details

Mkt Cap (Rs cr)	11,065
Eq Shares O/s (Cr)	4.20
Avg Vol (Lakhs)	0.02
52 Week H/L	2940/2179
Dividend Yield (%)	1.3
Face Value (Rs)	10.0

Latest shareholding pattern (%)

Promoters	43.16
Indian Institutions	18.39
FII's	13.27
Public	25.18
Total	100.0

Stock performance (%)

	1m	3m	6m
GlaxoCons	-3.5	-6.0	2.6
Nifty	-1.5	-0.9	2.2

Technical Levels To Watch

Upside : above 2690 for 2700

Downside : below 2600 for 2520



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