



17/07/2017

SHIRE PLC

blue = bbg consensus data

black = calculated / formulas

red = input

	PRICE	Upside	
SHP LN Equity	4,122.00		
SH OUT	908		
TP sales guidance	5136	24.6%	
TP dcf	6256	51.8%	
MKT CAP	38,771		
NET DEBT	22,439	EV	61,210
BV/S	32.53	BV	29,533
Pension Liabilities	#N/A N/A	% ev	
Avg Daily Vol	107,550,111	EURO	

	EPS	P/E	EBITDA	EBITDA	ROE	Cap Empl	ebit	ROCE
LAST YR	4.323	9.5	2,429	25.20	13.29%			
CURRENT YR	4.983	8.27	6,329	9.67	15.32%		5,888	
NEXT YR	5.603	7.36	7,063	9	17.23%	6,601	6,602	100%
NEXT YR+1	6.254	6.59	7,776	7.87	19.23%		7,111	108%
NEXT YR+2	6.698		8,328					
GAGR 3yr	13.10%		47.38%		from 1st yr			
GAGR 3yr	10.36%		9.59%		from this yr			

NXT YR	PRICE	EPS	P/E	mkt cap	net debt	EV	SALES	sales	EBITDA	ebitda	BVPS	P/BV	
SHIRE PLC	SHP LN Equity	4,122	559	7.4	38,771	22,439	61,210	16,069	3.81	7,063	8.67	32.53	1.27
SANOFI	san fp Equity	84.03	6.08	13.8	108,374	6,702	115,076	37,411	3.08	11,327	10.16	45.58	1.84
ROCHE	rog vx Equity	245.30	16.26	15.1	210,540	13,248	223,788	55,029	4.07	22,666	9.87	28.07	8.74
NOVO	novob dc Equity	278.90	16.82	16.6	696,250	-20,470	675,780	120,763	5.60	55,973	12.07	16.12	17.3
BAYER	bayn gy Equity	111.95	8.295	13.5	93,073	11,483	104,556	52,675	1.98	12,893	8.11	40.66	2.75
AVERAGE				13.3						3.71		9.78	6.38
				-44.4%								-11.4%	

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