

CADILA HEALTHCARE - Nearing Inflection Point

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Abstracts

Cadila's Q4 FY12 result was much higher than our estimates owing to better performance across the board on sales and margin. Y-o-Y sales grew by 15.3%, EBITDA grew by 20% and net profit declined by 4.5% due to forex loss. FY12 remained a year of consolidation after Cadila acquired Neshor, Bremer and Biochem. Going forward, the company has many earnings triggers like (1) resolution of its facility under warning by the FDA. (2)Improvement in margin from Biochem. (3)Hospira JV. (4)Two new products from Neshor. (5) Possible FTF product launch in FY14. CDH's focus on technology intensive portfolio for US including transdermals, nasals, injectables too remains lucrative. We upgrade the stock to Outperform with target price of `920.

Contents

COMPANIES MENTIONED

Cadila Healthcare

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