

A-Share Listed Aerospace, Aviation and Defense Companies - Profiles and Financial Data

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Abstracts

Since 2010, China has kept launching spacecrafts at a high frequency. The average annual number of launches was 17 from 2010 to 2015 and reached 22 in 2016, tying the U.S. as the world's leader. China Aerospace Science and Technology Corporation has planned 28 launches in 2017. It is expected that China's spaceflight activities will be as frequent as that in the past, leading to the prosperity of spacecraft and relevant supporting and satellite applications. In December 2016, the State Council issued China's Space Activities in 2016. It is anticipated that from 2017 to 2021, China will continue with its efforts in crewed spaceflight, moon exploration, Beidou navigation satellite system, high-resolution earth observation system program, a new generation of carrier rockets, etc. Another group of major technology projects and major construction projects will also be initiated.

The aviation industry consists of aircraft manufacturing and aircraft operation, with the former being further divided into plane manufacturing, helicopter manufacturing, engine manufacturing, etc. The aircraft operation industry consists of three fields: commercial aviation, general aviation and military aviation. The civil aviation transport industry has been growing at over 10% in recent years. The recorded number of civil transport aircrafts was 2,152 at the end of 2013, 2,370 at the end of 2014 and 2,650 at the end of 2015. China has become the second largest aviation transport market in the world. It is estimated that in the two decades following 2017 China's civil aviation industry will add another 6,000 new aircrafts valued at a total of USD 1 trillion.

In 2016, top 10 countries in terms of defense spending were the U.S., China, the U.K., India, Saudi Arabia, Russia, France, Japan, Germany and South Korea.

China's defense spending was CNY 954.354 billion (USD 143.7 billion), second only to

the U.S. and before the U.K. and India. However, this is just 24.6% of defense spending of the U.S. China's defense spending per capita is 1/18 of that of the U.S., 1/9 of the U.K., 1/7 of France and 1/5 of Russia and Japan. China's military personnel per capita is 13.58% that of the U.S., 22.98% of the U.K., 22.8% of France and 14.3% of Germany. Although China's defense spending has kept growing for a long time, it still accounts for only 1.3% of GDP and remains at such level for some time. By contrast, in many other major countries, the proportion is between 2% and 5 - %4% in the U.S. and 4%-5% in Russia. According to Ministry of Finance of China, it plans to arrange CNY 1,044.397 billion (USD 151.4 billion) for defense, increasing by 7% over 2016.

Due to the gap between China's defense spending and that of developed countries, it is expected that in the next few years China will still increase its spending on defense, which will benefit aerospace, aviation and defense industries.

In this report, CRI analyzes 24 aerospace, aviation and defense enterprises listed in A-share market in China.

The report is composed of two parts: the first part is enterprise profiles and the second part is the operation status of these enterprises in the recent decade (presently 2006 to 2016, we will update it to the latest as time goes by).

The operation status is demonstrated from the following perspectives: (1) financial indexes, such as earnings per share, book value per share (BPS), sales per share, net cash flow per share, return on net worth and debt to asset ratio; (2) indexes on the income statement, such as revenue, operating profit, net profit and EBIT; (3) indexes on the income statement, such as revenue, operating profit, net profit and EBIT; (4) indexes on the balance sheet, such as liquid asset, fixed asset, current liability, non-current liability, capital reserve and shareholders' equity.

(1) Financial Indexes

Earnings per Share

Book Value per Share (BPS)

Sales per Share (SPS)

Net Cash Flow per Share from Operations

Net Cash Flow per Share (CNY)

Return on Net Worth

Net Profit Margin on Total Assets

Return on Invested Capital (ROIC) (%)

Gross Profit Margin on Sales (%)

Net Profit Margin on Sales (%)

EBIT Margin (%)

EBITDA Margin (%)

Debt to Asset Ratio (%)

Total Asset Turnover (times)

Cash/Operating Income Received from Sales of Goods or Services

YOY Growth Rate of Operating Revenue (%)

YOY Growth Rate of Operating Profit (%)

YOY Growth Rate of Net Profit Attributable to Shareholders of Parent Company (%)

(2) Summary of Income Statement

Gross Revenue (CNY, million)

Total Operating Costs (CNY, million)

Revenue (CNY, million)

Operating Profit (CNY, million)

Total Profit (CNY, million)

Net Profit (CNY, million)

Net Profit Attributable to Shareholders of Parent Company (CNY, million)

Non-recurring Items (CNY, million)

Net Profit Deducting Non-recurring Items (CNY, million)

R&D Costs (CNY, million)

Earnings Before Interest and Tax (EBIT) (CNY, million)

Earnings Before Interest, Taxes, Depreciation and Amortization (EBITDA) (CNY, million)

(3) Summary of Balance Sheet

Liquid Asset (CNY, million)

Fixed Asset (CNY, million)

Long-term Equity Investment

Total Assets (CNY, million)

Liquid Liability (CNY, million)

Non-current Liability (CNY, million)

Total Liability (CNY, million)

Capital Reserve (CNY, million)

Surplus Reserve (CNY, million)

Undistributed Profit (CNY, million)

Shareholders' Equity (CNY, million)

Equity Attributable to Shareholders of Parent Company (CNY, million)

(4) Summary of Cash Flow Statement

Cash Received from Sales of Goods and Services (CNY, million)

Cash Flow from Operations (CNY, million)

Cash Paid to Purchase Fixed Assets, Intangible Assets and Other Long-term Assets (CNY, million)

Cash Paid for Investments (CNY, million)

Cash Flow from Investments (CNY, million)

Cash Received from Investors (CNY, million)

Cash Received from Borrowings (CNY, million)

Cash Flow from Financing (CNY, million)

Net Increase of Cash and Cash Equivalents (CNY, million)

Cash and Cash Equivalents, End of Period (CNY, million)

Depreciation and Amortization (CNY, million)

Contents

COMPANIES IN THE REPORT:

- 1 Avicopter Plc (600038.SH)
- 2 China Spacesat Co., Ltd. (600118.SH)
- 3 North Electro-Optic Co., Ltd. (600184.SH)
- 4 Jiangxi Hongdu Aviation Industry Co., Ltd. (600316.SH)
- 5 China Avionics Systems Co., Ltd. (600372.SH)
- 6 Sichuan Chengfa Aero-Science & Technology Co., Ltd. (600391.SH)
- 7 North Navigation Control Technology Co., Ltd. (600435.SH)
- 8 China Aerospace Times Electronics Co., Ltd. (600879.SH)
- 9 Avic Aviation Engine Corporation Plc. (600893.SH)
- 10 Anhui Sun Create Electronics Co., Ltd. (600990.SH)
- 11 Avic Aero-Engine Controls Co., Ltd. (000738.SZ)
- 12 Avic Aircraft Co., Ltd. (000768.SZ)
- 13 Aerospace Hi-Tech Holding Group Co., Ltd. (000901.SZ)
- 14 Avic Electromechanical Systems Co., Ltd. (002013.SZ)
- 15 Sichuan Haite Hi-tech Co., Ltd. (002023.SZ)
- 16 Beijing BDStar Navigation Co., Ltd. (002151.SZ)
- 17 Beijing UniStrong Science & Technology Co., Ltd. (002383.SZ)
- 18 Jiangsu Leike Defense Technology Co., Ltd. (002413.SZ)
- 19 Chengdu Corpro Technology Co., Ltd. (300101.SZ)
- 20 Hi-Target Navigation Tech Co., Ltd. (300177.SZ)
- 21 Xi'An Tian He Defense Technology Co., Ltd. (300397.SZ)
- 22 Guangzhou Hangxin Aviation Technology Co., Ltd. (300424.SZ)
- 23 Changsha Jingjia Microelectronics Co., Ltd. (300474.SZ)
- 24 Xi'an ChenXi Aviation Technology Corp., Ltd. (300581.SZ)

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