

A-Share Listed Medium Voltage Distribution Equipment Companies - Profiles and Financial Data

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Abstracts

In China, networks with a voltage below 110kV are called distribution networks. High-voltage distribution networks range from 35kV to 110 kV (also range from 35kV to 220kV when load density is high). Medium voltage distribution networks generally refer to networks with a voltage of 10kV, for the 6kV has been phased out. With the advances of urbanization, medium voltage distribution networks will be upgraded to 20kV, in order to reduce line loss, increase the power distance and take the most of distribution channels. Low voltage distribution networks are from 220V to 380V.

With the rapid urbanization, the agricultural land per capita is decreasing, pushing up the price of land. The industry of high power consumption are developing fast, thereby raising the power capacity per unit area. All of these ask for more miniaturization and higher capacity of switchgears.

Currently, the control device of power transmission and distribution is becoming increasingly intelligent. The intelligence, miniaturization and compacting trend of switchgears becomes prominent. However, compared with other global well-known enterprises, Chinese power transmission and distribution enterprises mostly are weak in R&D and now produce traditional power transmission and distribution equipment. The manufacturers of power transmission & distribution and control equipment are in great quantities, while most of them are small-scale and weak in technologies. The large number of mid-small manufacturers intensifies the competition in low-end market.

The equipment of power transmission and distribution generally lasts around 10 to 15 years. In the 1990s, China introduced outdoor power transmission & distribution and control equipment. At present, early equipment is near the end of or has exceeded the service life, which means a new round of upgrade cycle. As a result, the demand for

upgrading products will continue to grow and thereby boost the market of power transmission and distribution.

Action Plan on Reconstruction and Construction of Power Distribution Networks issued by National Energy Administration clearly stated that from 2015 to 2020, the investment in reconstruction and construction of power distribution networks would be not less than CNY 2 trillion. The Chinese government is attaching more importance on the construction on electric networks, therefore providing huge potential for further development of the industry.

In this report, CRI analyzes 18 medium voltage distribution manufacturing 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)

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