

Abbott India

Q1 FY22 Results Analysis

Abbott India: 6 Point Analysis



Abbott India – Q1 FY22 Results (Standalone)

(Rs. Cr)	Q1 FY22	Q1 FY21	YoY %	Q4 FY21	QoQ %
Revenue From Operations	1218	1064	14%	1096	11%
Expenses	953	831	15%	890	7%
EBITDA	284	261	9%	222	28%
EBITDA Margin	23%	25%	-2%	20%	3%
PAT	196	180	9%	152	29%
PAT Margin	16%	17%	-1%	14%	2%
EPS	92	85	8%	72	28%

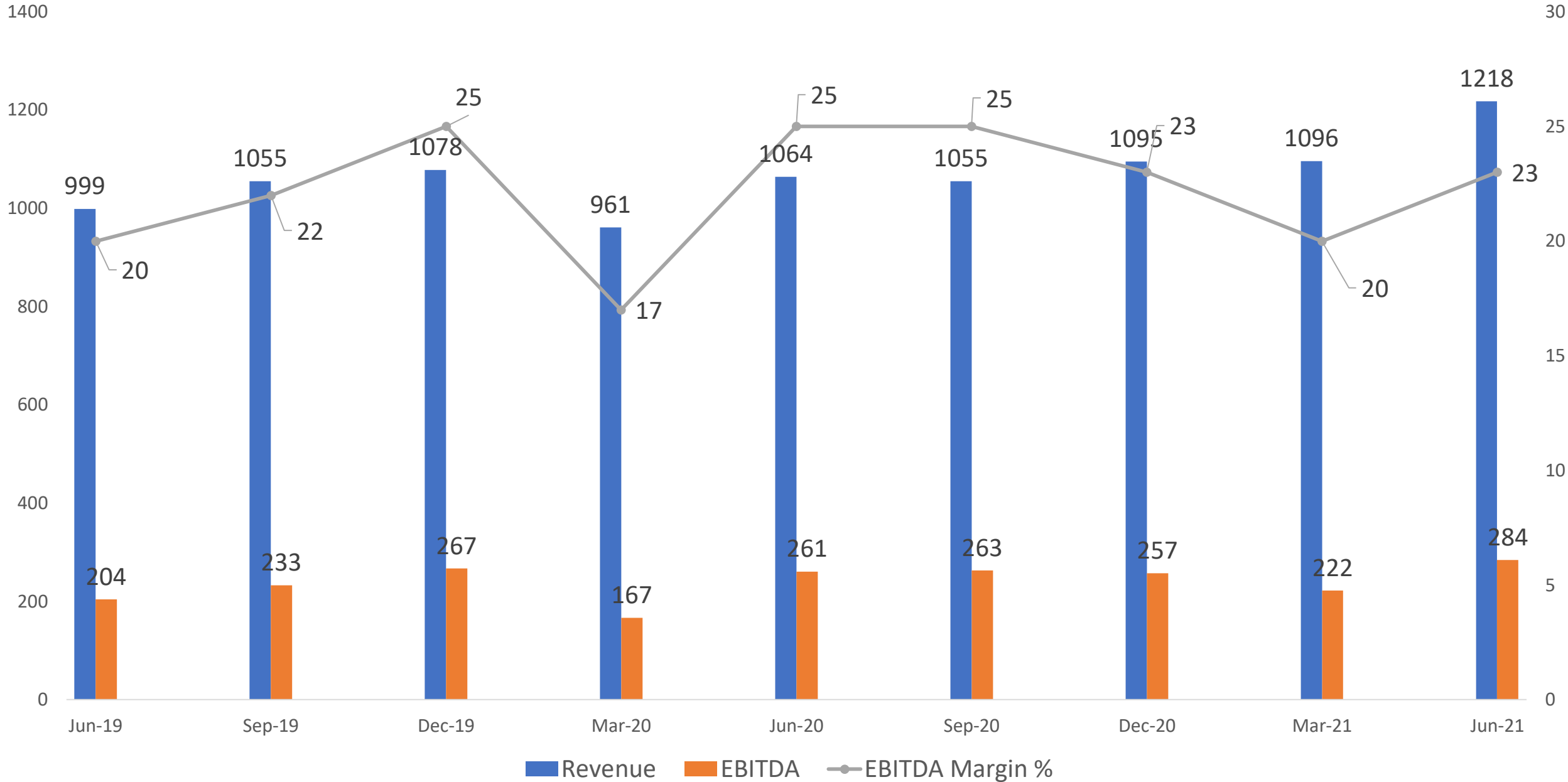
The Company has been displaying consistent growth over the years which has been its tailwind since years

Abbott India – Q1 FY22 Results (Consolidated)

As a % of Sales	Q1 FY22	Q1 FY21	Q4 FY21
Raw Material	9.85%	11.84%	9.76%
Purchases of Stock	43.02%	50.94%	49.45%
Inventory	2.79%	-5.36%	3.83%
Employee Cost	11.90%	12.03%	11.04%
Finance Cost	0.41%	0.41%	0.43%
Depreciation	1.31%	1.32%	1.37%
Other Expenses	10.51%	8.65%	14.87%

YOY margin has slightly declined due to closing inventory being lower in Quarter 1 FY 2022. Other Expenses increment have affected the PAT margins slightly.

Abbott India – Revenue & EBITDA Over The Quarters (Crores)

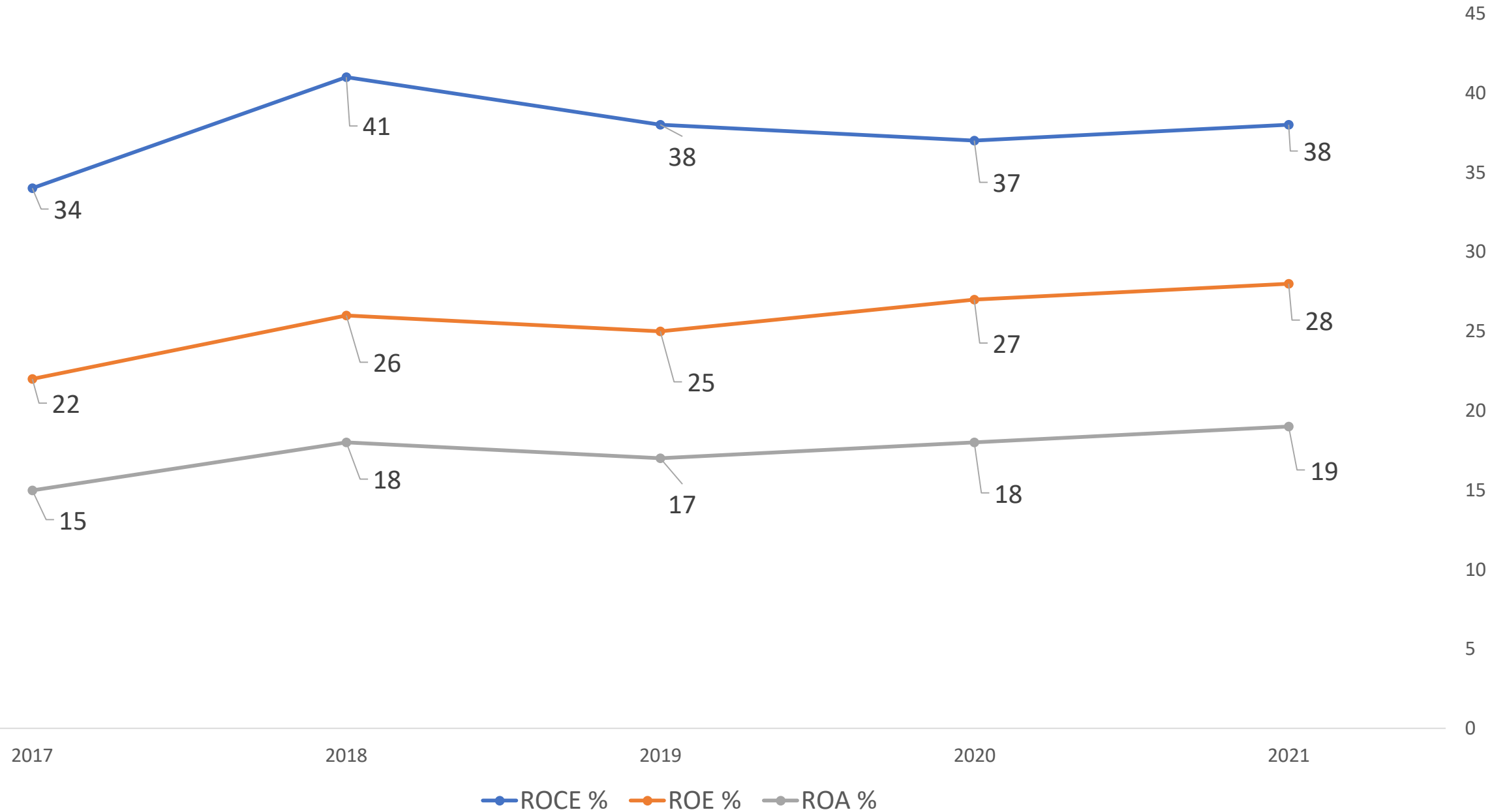


Abbott India – CAGR Growth Over The Years(%)

Particulars	3 Year	5 Year	10 Year
Sales Growth	9.3%	10.5%	11.2%
Expenses Growth	6.91%	8.54%	9.94%
Profit Growth	19.8%	22.04%	19.09%

Profit Growth has always been mostly double than the sales growth. The company has been delivering constant sales & profits to its investors during last 10 years.

Abbott India: ROCE, ROE & ROA Over The Years (%)



Abbott India – Valuations

Metric	Value
PE Ratio	53
3-5 Year Median PE	42.5
Dividend Yield	1.57%
P/B Ratio	13.55
3-5 Year Median PB	13.52

The Stock is currently slightly Overvalued considering a which is almost 25% higher than its 3-5 year Median PE along with P/B of 13.5 which is at par with 3-5 Year Median P/B. Dividend yield of the company is stands at a healthy 1.57%

THANK YOU!

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– <https://investyadnya.in> OR you can write to us at
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