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PREPARED BY ROGER MONTGOMERY

rogermontgomery.com

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Trading / Market Prices

Market Prices

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To see a security price, type in the Code or select [advanced options](#).

1

Code: (search)

Share Quote as at 9:21 AM Sydney Time, Tuesday, 10 August 2010

CommSec Margin Lending LVR: 70%

WOOLWORTHS LIMITED FPO

Code	Bid	Offer	Last	Change*	% Change*	Open	High	Low	Volume	Trades	Value	News
WOW	27.610	25.370	26.700	0.000	0.000	0.000	0.000	0.000	0	0	0	

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Indicative Price: ~~26.700~~ Surplus Volume: **2,642**

Trading Status: **Pre Open**

Market Depth

BUY				SELL			
Number	Quantity	Price	#	Price	Quantity	Number	
1	470	27.610	1	25.370	1,962	1	
1	140	27.290	2	26.040	1,178	1	
2	786	27.180	3	26.600	4,599	2	
1	52	27.160	4	26.700	400	1	
1	375	27.110	5	26.710	500	1	
4	962	27.000	6	26.720	1,360	3	
1	39	26.900	7	26.730	375	1	
1	38	26.820	8	26.750	1,186	2	
1	80	26.800	9	26.780	1,150	1	
3	1,300	26.750	10	26.800	3,884	5	

1046 buyers for 610,258 units

638 sellers for 587,517 units

52 Week	
High	Low
30.570	25.190
Last traded time	

Market Indices		
Index	Value	Change
ASX SPI 200	4,563.00	4
All Ordinaries	4,615.60	0
Dow Jones	10,698.75	45.19
FTSE-100	5,410.52	78.13
Hang Seng	21,801.59	0
NASDAQ	2,305.69	17.22
Nikkei 225	9,572.49	0
S & P 500	1,127.79	6.15

Quick Links

- Watchlist
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CommSec News

- CommSec special introductory offer. See more
- Man OM-IP AHL 2010 – managed futures, capital guarantee
- State of the States - State & territory economic rankings
- Beware of unsolicited offer for Commonwealth Bank & PERLS IV shares
- Important Information: ASX FX CFDs trading

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08:33 10/08/2010

1. Type in company Code, click Get Quote
2. Click on Research

ASX Code: **WOW** **Woolworths Limited**

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Key Measures

VALUE	Company	All Ords	Sector
P/E ratio	16.32	14.37	14.94
P/B ratio	4.80	1.37	1.76
P/E Growth ratio	1.67	1.59	1.67
P/S ratio	0.66	1.70	0.63

INCOME	Company	All Ords	Sector
Dividend yield	4.1%	4.6%	4.1%
Franking	100.0%		
Tax adjusted dividend yield	3.2%	3.3%	3.2%
Dividend stability	100.0%	91.7%	92.9%

RISK	Company	All Ords	Sector
Beta	0.69	1.07	0.71
Current ratio	0.76	1.64	0.90
Quick ratio	0.19	1.10	0.34
Earnings stability	87.8%	54.2%	53.1%
Debt/Equity ratio	46.6%	31.7%	49.8%
Interest Cover	12.11	3.99	2.14

GROWTH RATES	10yr	5yr	1yr	2yr Fcst
Sales	9.6%	8.0%	4.5%	
Cashflow	9.4%	11.7%	-2.5%	
Earnings	18.6%	17.6%	12.1%	9.8%
Dividends	18.2%	18.2%	13.0%	9.2%
Book Value	15.4%	22.7%	12.5%	

Previous Close	52 week high	52 week low
26.70	30.57	25.19
P/E Ratio		
16.32		
Sector		
Food & Staples Retailing		
Market Capital		
\$32,874 million		

Total Shareholder Return (avg annual rate)			
1yr	3yr	5yr	10yr
-1.0%	-0.8%	14.1%	18.3%

Earnings and Dividends Forecast (cents per share)				
	2009	2010	2011	2012
EPS	149.7	163.6	180.3	196.4
DPS	104.0	114.0	124.1	135.6

Index Participation	
Index Name	Weight
S&P/ASX 100	3.28%
S&P/ASX 20	4.61%
All Ordinaries	2.56%
S&P/ASX 50	3.71%
S&P/ASX 100 INDUSTRIALS	4.64%

Forecast Earnings Per Share and Dividends Per Share

Company Historicals

PER SHARE STATISTICS

	6/00	6/01	6/02	6/03	6/04	6/05	6/06	6/07	6/08	6/09
Sales(\$)	17.80	20.08	23.56	25.18	27.60	30.47	33.72	35.51	38.82	40.56
Cash Flow(cents)	94.8	75.9	110.7	117.4	122.3	116.4	151.8	191.1	217.9	212.4
Earnings(cents)	32.4	40.2	49.3	57.2	66.6	75.4	90.3	107.8	133.5	149.7
Dividends(cents)	23.0	27.0	33.0	39.0	45.0	51.0	59.0	74.0	92.0	104.0
Franking(%)	100	100	100	100	100	100	100	100	100	100
Capital Spending(cents)	-35.7	-50.4	-56.2	-55.7	-69.6	-112.5	-125.7	-94.2	-143.5	-136.8
Book Value(\$)	1.54	1.47	1.73	1.78	2.00	2.04	3.44	4.37	4.95	5.57
Shares Outstanding(m)	1,060	1,035	1,049	1,020	1,021	1,061	1,171	1,207	1,210	1,223
Avg annual PE ratio	16.6	19.8	24.0	21.1	17.5	19.1	19.2	21.9	22.2	17.6
Relative P/E(%)	124.2	148.4	172.8	160.0	123.8	130.4	140.2	149.6	145.1	165.6
Total Return(%)	27.0	84.5	22.5	-2.0	-5.7	49.8	25.9	37.8	-6.9	11.8
+/- Market(%)	10.3	75.6	27.0	-0.9	-28.0	25.0	1.7	7.5	5.2	34.0
+/- ASX sector(%)	--	--	--	--	--	--	--	--	--	--

Earnings & Dividends

Shares On Issue

HISTORICAL FINANCIALS

	6/00	6/01	6/02	6/03	6/04	6/05	6/06	6/07	6/08	6/09
Revenues (\$million)	20,029	21,399	24,998	26,826	28,494	31,970	37,878	42,622	47,287	49,739
Operating margin(%)	4.6	4.8	4.7	5.0	5.2	5.5	5.9	6.4	6.8	7.2
Depreciation (\$million)	-256	-275	-297	-335	-341	-377	-458	-517	-571	-627
Amortisation (\$million)	-32	-35	-54	-62	-66	-84	-64	-72	-78	-102
Net profit before abnormals (\$million)	364	428	523	609	687	790	1,014	1,294	1,626	1,835
Net profit (\$million)	295	428	523	609	687	790	1,014	1,294	1,626	1,835
Income tax rate(%)	35.6	31.4	27.0	28.2	28.2	29.9	30.3	30.2	29.3	29.2
Net profit margin(%)	1.8	2.0	2.1	2.3	2.4	2.5	2.7	3.0	3.4	3.7
Employees (thousands)	125.0	140.0	145.0	145.0	78.0	79.3	94.4	180.0	190.0	191.0
Long term debt (\$million)	302	301	498	496	494	2,614	3,704	2,690	2,224	2,986
Shareholders equity (\$million)	1,627	1,521	1,818	1,818	2,047	2,163	4,027	5,275	5,992	6,812
Return on capital(%)	20	24	24	28	29	19	16	19	22	20
Return on equity(%)	22.4	28.1	28.8	33.5	33.6	36.5	25.2	24.5	27.2	27.0
Payout ratio(%)	71	67	67	68	68	68	65	69	69	69

Net Profit

Equity

Balance Sheet

CAPITAL STRUCTURE

(\$ 000s)

Total Debt	3,174,900
Long Term Debt	2,986,300
Preferred Stock	
Shareholders equity	

CURRENT POSITION (\$ 000s)

	2007	2008	2009
Cash Assets	798,800	754,600	762,600
Receivables	379,700	455,200	466,500
Inventory	2,739,200	3,010,000	3,292,600
Others	243,300	282,400	337,500
TOTAL CURRENT ASSETS	4,161,000	4,502,200	4,859,200
Accounts Payable	4,184,700	4,737,700	5,030,100
Debt Due	379,800	550,200	188,600
Others	938,300	1,136,500	1,195,900
CURRENT LIABILITIES	5,502,800	6,424,400	6,414,600

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Markets: **Australia**

Enter your company asx code. In this case FWD for Fleetwood

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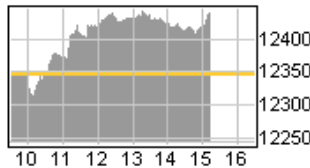
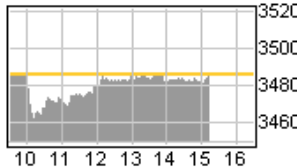
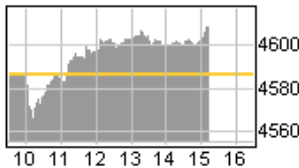
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S&P/ASX 200 Industrials (XIJ)
3482 -3.4 (-0.1%)

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Shares: Balance Sheet



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Profile | **Balance Sheet** | Company Overview | Dividends | Major Shareholders | Printable Report

Fleetwood Corporation Limited (FWD)
(Trading Status: OPEN)

As at 9/08/2010 3:18:53 PM
Real-Time

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Last Price	Today's Change	Open	Day High	Day Low	52-Week Range	BUY	SELL
10.040	0.050 (0.501%)	9.900	10.040	9.900	10.130 6.420		

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A Company with Little or No Debt

Research By: **ASPECTHUNTLEY**

Capital Structure (\$ 000s)

Total Debt	9,000	Interest: 1,875
Long Term Debt	9,000	(6% of capital)
Preferred Stock	0	
Shareholders Equity	141,749	(94% of capital)

Be careful some companies have a lot of debt maturing this year and this will not be in the long term debt area

Current Position

	2007	2008	2009
Cash Assets	10,288	8,226	6,018
Receivables	48,474	49,669	36,536
Inventory	35,004	42,134	35,559
Others	11	10	9
Total Current Assets	93,777	100,039	78,122
Accounts Payable	44,040	47,024	36,145
Debt Due	0	0	0
Others	6,761	12,585	7,876
Total Current Liabilities	50,801	59,609	44,021

Per Share Statistics

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Sales (\$)	2.63	3.30	4.29	4.80	5.45	5.65	5.33	6.22	6.81	€
Cash Flow (cents)	19.0	7.5	65.6	44.9	41.0	43.1	39.6	80.9	118.9	10
Earnings (cents)	13.2	12.8	20.5	28.5	43.9	39.1	43.7	53.4	67.8	€
Dividends (cents)	11.5	12.0	13.0	14.0	18.0	60.0	60.5	43.0	65.0	€
Franking (%)	100	100	100	100	100	100	100	100	100	€
Capital Spending (cents)	-35.2	-15.8	-37.2	-53.4	-48.8	-71.8	-32.9	-42.8	-0.6	€
Book Value (\$)	1.18	1.23	1.32	1.80				.39	2.56	€
Shares Outstanding (m)	32.5	35.7	36.8	44.5	45.5	46.3	48.3	50.0	51.2	!
Avg P/E Ratio	11.8	10.6	8.7	10.7	13.7	20.5	15.5	14.8	14.1	
Relative P/E (%)	88.3	79.4	63.0	80.7	96.6	140.0	113.1	100.8	92.0	€
Total Return (%)	-12.1	9.7	113.3	70.8	92.6	-15.0	16.1	42.7	14.0	€
Relative Return to Market (%)	-28.9	0.9	117.8	71.8	70.2	-39.7	-8.2	12.4	26.2	
Relative Return to Sector (%)	--	--	--	--	--	--	--	--	--	

This is a flaw with etrade as you cant see all the figures. The 2009 figures aren't shown. To fix this go to the very bottom of the page and click the bar as far right as it will go. But be warned you probably wont be able to see the description buttons so you have to really know where you are

The 2009 figure is hear. take my word for it it is \$2.69

This is the equity per share that roger always speaks about. No Need to get total equity then divide by number of shares on issue. It is already calculated for you

Historical Financials

	2000/06	2001/06	2002/06	2003/06	2004/06	2005/06	2006/06	2007/06	2008/06	2009
Revenues (\$ million)	74.7	114.6	158.4	188.7	251.2	261.8	252.4	309.6	343.5	3
Operating Margin (%)	16.0	13.8	12.1	13.2	15.5	13.2	15.3	15.7	17.9	
Depreciation (\$ million)	-4.4	-4.7	-4.4	-4.7	-5.8	-5.9	-7.0	-7.4	-9.9	-
Amortisation (\$ million)	-1	-2	-2	-1	-2	-2	-1	-1	-1	
Nt Profit Bef. Abnormals (\$ million)	3.8	4.4	7.6	11.2	20.2	18.1	20.7	26.6	34.2	
Net Profit (\$ million)	3.8	4.4	7.6	11.2	20.2	25.1	20.7	26.6	34.2	

Income Tax Rate (%)	29.6	35.1	32.4	32.4	31.1	30.4	29.5	30.4	30.3	
Net Profit Margin (%)	5.0	3.9	4.8	5.9	8.1	6.9	8.2	8.6	10.0	
Employees (thousands)	0.0	0.6	0.6	0.8	1.0	1.0	0.9	1.0	1.1	
Long Term Debt (\$ million)	29.7	38.0	33.1	29.0	27.3	22.0	0.0	28.0	24.0	
S/holders Equity (\$ million)	38.5	43.8	48.4	80.3	96.4	105.2	110.7	119.6	130.9	1
Return on capital (%)	7	8	11	12	18	15	20	19	23	
Return on equity (%)	9.8	10.1	15.6	14.0	21.0	17.2	18.7	22.2	26.1	
Payout Ratio (%)	87	94	63	49	41	153	138	81	96	

More Research:

This is the bar I refer to above. Move it as far to the right as you can

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Shares: Profile



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- Dividends
- Major Shareholders
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Fleetwood Corporation Limited (FWD)

As at 9/08/2010 3:27:09 PM
Real-Time

(Trading Status: OPEN)

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Last Price	Today's Change	Open	Day High	Day Low	52-Week Range	BUY
10.030	0.040 (0.400%)	9.900	10.040	9.900	10.130 6.420	SELL

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Research By: ASPECTHUNTLEY

Company Profile

Fleetwood Corporation Ltd (FWD) operates in the mobile accommodation market, focussing on three sectors: retirement, recreation and resource development. The company has two key divisions: recreational vehicles and manufactured accommodation.

Previous Close	52 Week High	52 Week Low
9.99	10.13	6.42

P/E Ratio

15.19

Sector

Automobiles & Components

Market Cap (\$ Million)

539

Total Shareholder Return (avg annual rate)

1 Yr	3 Yr	5 Yr	10 Yr
38.1%	9.9%	19.1%	31.0%

Earnings and Dividends Forecast (cents per share)

	Curr	2010	2011
EPS	68.5	65.8	72.0
DPS	66.0	66.0	70.9

Company	Market	Sector
1.38	1.04	1.38
15.19	14.26	7.28
3.71	1.37	1.36
5.95	1.61	5.95

Balance Sheet

Capital Structure (\$ 000s)

Total Debt	9,000	Interest: 1,875
Long Term Debt	9,000	(6% of capital)
Preferred Stock	0	
Shareholders Equity	141,749	(94% of capital)

Key Measures

Value 3	Risk 3	Growth 3 Average	Income 2 Above Average
65.8	269	65.8	269

To find ROE take 65.8 and divide by 269 being the book value. Note the eps is in cents and the bookvalue is in dollars so you have to make a slight adjustment. In this case the roe is 24.35%

Again Move to this drop down button and find profile

Then Press Go

Messages

- 7/07/2010 2:06:26 PM**
Full Execution of Order
[5:1705929:106 - Account: 1183945](#)
- 7/07/2010 2:06:26 PM**
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These are the consensus analyst forecast. I understand the come straight from morningstar but I can't confirm this. For those that are interested they are identical to commsec

Payout ratio is dps divided by eps. In this case. close enough to 100%

The screenshot shows the 'Online Investing' website interface. On the left is a vertical navigation menu with items: Home, My Account, Quotes & Research, Quotes, Market, News, Stock Recommendations, Research, IPOs, Trading, Products & Services, and Contact and Support. The 'Quotes & Research' and 'Quotes' items are circled in red, with a '1' next to the first and a '2' next to the second. The main content area shows 'You are here: Quotes & Research > Quotes' and a 'Quotes' section with a search box containing 'WOW' and a 'Display' button, both circled in red with a '3' next to them. Below the search box, the stock price for WOW is shown as 26.700, up \$0.050 (0.187%). A grid of links is visible, with 'Financials' circled in red and a '4' next to it. Other links include Key Measures, Forecasts, Analysis, Peer Analysis, Shareholders, Warrants, Company Info, Dividends, Research Library, Announcements, Directors, and Corporate Calendar. At the bottom, there are tabs for 'Value' and '52 Week'.

1. Click on Quotes & Research
2. Select Quotes
3. Type the company Code in the Search box. Click Display
4. Click Financials



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Quote: Open in new window

Quotes

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- Option Series
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Code:

WOW 26.700 ↑ \$0.050 (0.187%)

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WOOLWORTHS LIMITED FPO (ORDINARY FULLY PAID)

Tue 10 Aug 2010 8:45 AM (Sydney time)

- Key Measures
- Financials
- Company Info
- Announcements
- Analysis
- Peer Analysis
- Dividends
- Directors
- Corporate Calendar
- Shareholders
- Warrants
- Research Library
- Charts

Company Historicals

Per Share Statistics	2000/06	2001/06	2002/06	2003/06	2004/06	2005/06	2006/06	2007/06	2008/06	2009/06
Sales (\$)	17.80	20.08	23.56	25.18	27.60	30.47	33.72	35.51	38.82	40.56
Cash Flow (cents)	94.8	75.9	110.7	117.4	122.3	116.4	131.8	104.4	217.9	212.4
Earnings (cents)	32.4	40.2	49.3	57.2	66.6	75.4	90.3	107.8	133.5	149.7
Dividends (cents)	23.0	27.0	33.0	39.0	45.0	51.0	59.0	74.0	92.0	104.0
Franking (%)	100	100	100	100	100	100	100	100	100	100
Capital Spending (cents)	-35.7	-50.4	-56.2	-55.7	-69.6	-112.5	-125.7	-94.2	-143.5	-136.8
Book Value (\$)	1.54	1.47	1.73	1.78	2.00	2.04	3.44	4.37	4.95	5.57
Shares Outstanding (m)	1,060.0	1,035.5	1,049.2	1,020.9	1,021.9	1,061.5	1,171.9	1,207.3	1,210.5	1,223.6
Avg Annual P/E Ratio(%)	16.6	15.6	24.6	21.1	17.5	18.1	19.2	21.9	22.2	17.6
Relative P/E (%)	124.2	148.4	172.8	160.0	123.8	130.4	140.2	149.6	145.1	165.6
Total Return (%)	27.0	84.5	22.5	-2.0	-5.7	49.8	25.9	37.8	-6.9	11.8
+/- Market (%)	10.3	75.6	27.0	-0.9	-28.0	25.0	1.7	7.5	5.2	34.0
+/- ASX sector (%)	-	-	-	-	-	-	-	-	-	-
Net Interest Cover	22.36	53.94	16.49	23.82	22.52	8.35	6.90	8.88	12.15	12.82
Net Gearing (%)	4.9	25.3	13.0	19.7	8.0	110.0	89.0	41.2	32.4	34.2
Debt/Equity (%)	26.5	42.2	29.2	35.5	25.0	129.7	101.4	55.7	44.5	45.0
NTA	1.40	1.17	1.21	1.24	1.44	0.14	-0.62	0.23	0.96	1.54
Market Cap (m)	6,535	11,390	13,797	12,782	11,650	17,525	23,614	32,597	29,597	32,255
Dividend Yield (%)	3.7	2.4	2.5	3.1	4.0	3.1	2.9	2.7	3.8	4.0

Earnings & Dividends

Shares On Issue

Historical Financials

	2000/06	2001/06	2002/06	2003/06	2004/06	2005/06	2006/06	2007/06	2008/06	2009/06
Revenues (m)	20,029.8	21,399.7	24,998.5	26,826.3	28,494.1	31,970.4	37,878.4	42,622.6	47,287.7	49,739.4
Operating margin (%)	4.6	4.8	4.7	5.0	5.2	5.5	5.9	6.4	6.8	7.2
Depreciation (m)	-256.6	-275.0	-297.3	-335.9	-341.4	-377.4	-458.1	-517.3	-571.9	-627.9
Amortisation (m)	-32	-35	-54	-62	-66	-84	-64	-72	-78	-102
Income tax rate (%)	35.6	31.4	27.9	28.2	28.2	29.9	30.3	30.2	29.3	29.2
Net Profit Before Abnormals (m)	364.0	428.0	523.2	609.5	687.8	790.5	1,014.6	1,294.0	1,626.8	1,835.7
Net Profit (m)	295.5	428.0	523.2	609.5	687.8	790.5	1,014.6	1,294.0	1,626.8	1,835.7
Employees (thousands)	126.0	140.0	145.0	145.0	178.0	202.0	244.0	189.0	190.0	191.0
Long term debt (m)	302.3	301.9	498.2	496.4	494.8	2,614.0	3,704.0	2,688.0	3,224.0	2,986.3
Shareholders Equity (m)	1,627.6	1,521.9	1,818.1	1,818.4	2,047.3	2,163.8	4,027.8	5,275.3	5,992.9	6,812.5
Return on capital (%)	20	24	24	28	29	19	16	18	22	20
Return on Equity (%)	22.4	28.1	28.8	33.5	33.6	36.5	25.2	24.5	27.2	27.0
Payout Ratio (%)	71	67	67	68	68	68	65	69	69	69
Return on Investments(%)	22.4	28.1	28.8	33.5	33.6	36.5	25.2	24.5	27.2	27.0
EBITDA (m)	910.4	1,016.4	1,183.6	1,344.0	1,472.7	1,744.0	2,244.4	2,705.3	3,197.2	3,577.9
EBIT (m)	621.6	706.6	832.7	945.7	1,065.1	1,283.0	1,722.2	2,116.0	2,547.1	2,848.5

Net Profit

Equity