

KLG

**WK Kellogg Co**

Country: United States of America  
 Exchange: NEW YORK STOCK EXCHANGE, INC.  
 Industry: Food & Tobacco  
 Sector: Consumer Staples

Market Cap Currency: USD

**General Information (Currency: USD)**

Price (Previous Close):	18.88	Beta 5 Year: (S&P 500 Index)	
Price - 52 Week High:	21.00	Dividend Yield (Indicated):	3.4%
Price - % Below High:	-10.1%	Shares Outstanding (MIL):	86
Price - 52 Week Low:	9.66	Float Shares (MIL):	80
Price - % Above Low:	95.5%	Float % of O/S:	93.3%
Median Price Target:	14.00	Market Capitalization (MIL):	1,620
Implied Profit:	-25.8%	Enterprise Value (MIL):	2,030

**Consensus Recommendation**

**HOLD**



# of Analysts:	10
Upgrades Last 30 Days:	0
Downgrades Last 30 Days:	1

**Estimates (Currency: USD)**

Period	Sales (MIL)			EBITDA (MIL)			EPS					
	Mean Est.	High Est.	Low Est.	Est. 30 Days Ago	Mean Est.	High Est.	Low Est.	Est. 30 Days Ago	Mean Est.	High Est.	Low Est.	Est. 30 Days Ago
FY0 (Actual)	2,763								1.28			
FY1 (Current Year)	2,715	2,733	2,696	2,716	271	288	267	264	1.48	1.54	1.34	1.49
% above/below mean		0.7%	-0.7%	0.0%		6.3%	-1.5%	-2.5%		4.1%	-9.4%	0.7%
FY2 (Next Year)	2,700	2,736	2,682	2,702	292	319	261	297	1.53	1.80	0.86	1.49
% above/below mean		1.3%	-0.7%	0.0%		9.4%	-10.5%	1.7%		17.4%	-43.9%	-2.5%

**Valuation Ratios**

Period	P/E	P/SALES	EV/REVS	EV/EBITDA
LTM (Last Twelve Months)	14.7x	0.6x	0.7x	7.6x
FY1 (Current Year)	12.8x	0.6x	0.7x	7.5x
FY2 (Next Year)	12.3x	0.6x	0.8x	7.0x

**FY0 Per Share Metrics (Currency: USD)**

Cash&STInv:	1.04	Sales:	32.27
Total Debt:	5.81	Cash Flow:	2.06
WorkingCap:	-1.51	Free CF:	-4.73
Book Value:	3.50	Dividends:	0.16

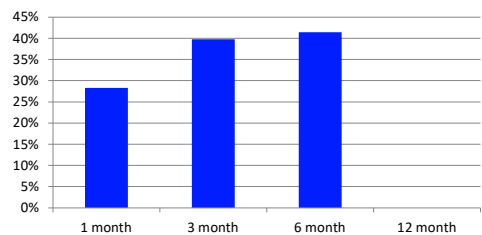
**FY0 Employee Data**

# of Emp:	3,150
Emp Grth:	0.0%
Rev/Emp:	877,143
5 yr Avg:	877,143

**Abbreviated Financials (Currency: USD)**

Income Statement (MIL)	FY0	FY-1	Balance Sheet (MIL)	FY0	FY-1	Cash Flow Statement (MIL)	FY0	FY-1
Sales	2,763	2,695	Cash & ST Investments	89		Net Income	110	-25
Gross Income	782	634	Fixed Assets	739	652	Funds From Operations	130	143
EBITDA	267	367	Total Assets	1,889	1,436	Cash From Operations	422	53
EBIT	201	299	Current Liabilities	836	666	Capital Expenditures	-150	-71
Pretax Income	145	-26	LT Debt	487	0	Cash From Investments	-146	-71
Net Income	110	-25	Total Liabilities	1,589	749	Cash Dividends Paid	-677	
Common Shares	86	86	Total Shareholders Equity	300	687	Cash From Financing	-188	18

**Review of Stock Performance**



**Profitability**

	FY0	5 Year Avg
Gross Margin	28.3%	Retrieving...
R/D % Sales	1%	1%
SGA % Sales	23%	21%
EBITDA Margin	9.7%	Retrieving...
Operating Margin	3.3%	Retrieving...
Pretax Margin	5.2%	Retrieving...
Net Margin	4.0%	Retrieving...
CF/Sales	6%	Retrieving...
Tax Rate	24.1%	Retrieving...
ROA	6.6%	Retrieving...
ROE	22.3%	16.3%

**FY0 Sales By Region**

Region	Sales
Canada	291
United States	2,439
Other	33
Segment Total	2,763
Consolidated Total	2,763

**Price Chart (Currency: USD)**

