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## TV18

Accumulate Current Price: Reli27 Target price: Reli2

#### Great growth but rich valuations

We like TVIS's business model and are builted on its growth prospects because of the strong and busyant ad market, its loyal and afficient audience, its dominant position in business broadcasting, upside from subscription revenues due to increasing addressability, growth of NewswireIS and the likely value unlocking from the spin-off of WebIS. We expect a CAGR of 36% and 80% respectively in revenues and profits over FYSTAID. However, valuations are now rich and leave little from for upplies in the near-term. It makes sense to buy only on dos and hence our Accountable rating.

A biseyant industry will drive growth. The ad industry will show a strong growth of 15-18% in the next 4 years as ad revenues are a leveraged play on GDP growth. TV ad and subscription revenues are expected to grow by 13% and 26% CAGR respectively during Cr06-11. Internet ad revenues will grow the fastest at A3% CAGR over Cr06-11. These brends create a benigh environment for TV-18.

TV18 is well policed to capture this growth. CV8C-TV18 and CV8C Ansist have a strong franchise with a loyal and affuent sudience. This will drive a strong growth in ad revenues at 26% and \$2% CAGR over fY87-30 respectively for the two channels, much fister than the industry. With CAG/UTM set to become compulsory in 55 additional cities, circulation revenues will get a boost and grow at 28% CAGR over FY07-30. Internet advertising is booming and internet revenues from its 15 websites/properties will grow at 75% CAGR over FY07-30. Neventration revenues will grow at 89% CAGR over FY08-10. The possible spin-off of thetcl8 in FY08 will unlock value and be an additional trigger.

Valuations are rich and offer limited upside in the near term. TVS8 ownersy stades at 50x 3-year forward earnings and EV/98/TOA multiple exist Pro8 and 26.8x Pro8. Our SOTP valuation for TVS8 gives at 50x 3-year of Re305. We have valued the TV broadcasting business of TVS8 at 30x 3-year forward earnings and the internet husband. The market card sales multiple of

## Initiating Coverage Report

Generally a long Report (here it is 38 pages!)

## **What Is An Analyst Report**

**Scotland. Local Government Board** 

#### **What Is An Analyst Report:**

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