ValuingTools

Teaser

Information Technology Company

Portuguese Company of Infrastructures and Technological Services

Connectivity, innovation and specialized support at the service of strategic sectors.

Appreciation	
Enterprise value	+ 480K €
Property value	+ 450K €
Equity value	= 930K €

KPI's	2023	2024
Turnover	1.6M €	1.7M €
EBITDA	17K €	41K €
Net income	6k €	22K €

With consolidated experience in networks and telecommunications, this company stands out in the design, implementation and maintenance of critical infrastructures, including fiber optics, wireless solutions and technological security systems. Supported by a multidisciplinary team, it guarantees reliable and scalable solutions for leading clients in banking, health and public administration.

A solid partner to respond to the challenges of digital transformation.

Income statement estimated (€)

	2025E	2026E	2027E	2028E	2029E
Revenue	**1,849,695**	**1,960,676**	**2,078,317**	**2,203,016**	**2,335,197**
growth (%)	*6.0%*	*6.0%*	*6.0%*	*6.0%*	*6.0%*
Cost of goods sold	-1,054,326	-1,117,586	-1,184,641	-1,255,719	-1,331,062
Gross profit	795,369	843,091	893,676	947,297	1,004,135
Gross margin %	*43.0%*	*43.0%*	*43.0%*	*43.0%*	*43.0%*
Payroll expenses	-174,690	-178,184	-181,747	-185,382	-189,090
Supplies and external services	-721,381	-764,664	-810,544	-859,176	-910,727
Other operating income	203,466	215,674	228,615	242,332	256,872
Other operating expenses	-55,491	-58,820	-62,350	-66,090	-70,056
EBITDA	47,273	57,097	67,651	78,980	91,134
EBITDA margin %	*2.6%*	*2.9%*	*3.3%*	*3.6%*	*3.9%*
Depreciation & amortization expenses	-5,048	-8,048	-11,048	-14,048	-17,048
EBIT	42,225	49,049	56,602	64,931	74,085
EBIT margin %	*2.3%*	*2.5%*	*2.7%*	*2.9%*	*3.2%*
Financial expense	0	0	0	0	0

Income statement estimated (€)

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	2025E	2026E	2027E	2028E	2029E
Financial income	0	0	0	0	0
EBT	42,225	49,049	56,602	64,931	74,085
EBT margin %	*2.3%*	*2.5%*	*2.7%*	*2.9%*	*3.2%*
Tax expense	-8,867	-10,300	-11,886	-13,636	-15,558
Net Income	**33,358**	**38,749**	**44,716**	**51,296**	**58,527**
Net income margin %	*1.8%*	*2.0%*	*2.2%*	*2.3%*	*2.5%*

Balance sheet estimated (€)

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	2025E	2026E	2027E	2028E	2029E
Cash and equivalents	649,637	667,193	691,032	692,638	729,918
Operating accounts receivable	354,736	429,737	512,462	603,566	671,769
Inventory	58,060	61,544	65,236	69,151	73,300
Government receivables	1,520	1,611	1,708	1,810	1,919
Shareholder's receivables	0	0	0	0	0
Accruals and deferrals	2,235	2,369	2,511	2,662	2,821
Other receivables	32,502	34,452	36,519	38,711	41,033
Total current assets	1,098,690	1,196,906	1,309,469	1,408,537	1,520,760
Fixed operating assets	96,638	103,589	107,541	108,493	106,445
Other non-current assets	129,442	129,442	129,442	129,442	129,442
Total non-current assets	226,079	233,031	236,983	237,935	235,886
Total assets	1,324,769	1,429,937	1,546,451	1,646,471	1,756,646
Accounts payable	414,139	464,975	520,256	551,471	584,559
Government payable	29,337	31,097	32,963	34,941	37,037
Accruals and deferrals	205,088	217,393	230,436	244,263	258,918

Balance sheet estimated (€)

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	2025E	2026E	2027E	2028E	2029E
Other payable	25,291	26,808	28,416	30,121	31,929
Total current liabilities	673,854	740,273	812,071	860,796	912,443
Long-term debt	0	0	0	0	0
Total non-current liabilities	0	0	0	0	0
Total liabilities	673,854	740,273	812,071	860,796	912,443
Common stock	250,000	250,000	250,000	250,000	250,000
Retained earnings	33,639	66,997	105,746	150,462	201,758
Other equity items	333,918	333,918	333,918	333,918	333,918
Net income	33,358	38,749	44,716	51,296	58,527
Total equity	650,915	689,664	734,380	785,676	844,203
Total liabilities + equity	1,324,769	1,429,937	1,546,451	1,646,471	1,756,646

Cash-flow statement estimated (€)

	2025E	2026E	2027E	2028E	2029E
Net income	33,358	38,749	44,716	51,296	58,527
(+) Depreciation & amortization expenses	5,048	8,048	11,048	14,048	17,048
Δ to net working capital	5,859	-14,241	-16,925	-48,739	-23,295
Operational cash-flow	**44,265**	**32,556**	**38,839**	**16,605**	**52,280**
Δ other assets	0	0	0	0	0
CAPEX	-15,000	-15,000	-15,000	-15,000	-15,000
Cash-flow after investment	**29,265**	**17,556**	**23,839**	**1,605**	**37,280**
Δ long-term debt	0	0	0	0	0
Δ equity	0	0	0	0	0
Cash-flow after financing	**29,265**	**17,556**	**23,839**	**1,605**	**37,280**
Cash balance	649,637	667,193	691,032	692,638	729,918