

ValuingTools

Teaser

Clothing Brand

Fashion and design with elegance and consistency

With three decades of experience, this European brand combines atelier savoir-faire, innovation and a high standard of quality in each collection.

Valuation		KPIs	2024
Enterprise value	+ 860,000 €	Turnover	1,840,000 €
Availability	+ 140,000 €	EBITDA	164,000 €
Equity value	= 1,000,000€	Net income	67,000 €
EBITDA Multiple 2025	5.5x		



A reference in clothing for special occasions, weddings, baptisms and events, it complements the offer with casualwear lines that preserve the same rigor of design and materials. It proposes solutions for women, men and children, always with attention to detail and the longevity of the pieces.

Based on elegance, versatility and quality, the brand translates an identity built over time, remaining faithful to its tradition and commitment to the consumer.

Elegance, versatility and quality.



Income statement estimated (€)

	2025E	2026E	2027E	2028E	2029E
Revenue	1,100,298	1,155,313	1,213,079	1,273,733	1,337,419
<i>growth (%)</i>	<i>-40.0%</i>	<i>5.0%</i>	<i>5.0%</i>	<i>5.0%</i>	<i>5.0%</i>
Cost of goods sold	-330,089	-346,594	-363,924	-382,120	-401,226
Gross profit	770,209	808,719	849,155	891,613	936,193
<i>Gross margin %</i>	<i>70.0%</i>	<i>70.0%</i>	<i>70.0%</i>	<i>70.0%</i>	<i>70.0%</i>
Payroll expenses	-282,151	-296,258	-311,071	-326,625	-342,956
Supplies and external services	-317,986	-333,885	-350,580	-368,109	-386,514
Other operating income	2,201	2,311	2,426	2,547	2,675
Other operating expenses	-16,504	-17,330	-18,196	-19,106	-20,061
EBITDA	155,768	163,556	171,734	180,321	189,337
<i>EBITDA margin %</i>	<i>14.2%</i>	<i>14.2%</i>	<i>14.2%</i>	<i>14.2%</i>	<i>14.2%</i>
Depreciation & amortization expenses	-85,867	-89,867	-93,867	-97,867	-101,867
EBIT	69,900	73,689	77,867	82,453	87,469
<i>EBIT margin %</i>	<i>6.4%</i>	<i>6.4%</i>	<i>6.4%</i>	<i>6.5%</i>	<i>6.5%</i>
Financial expense	0	0	0	0	0

Income statement estimated (€)

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	2025E	2026E	2027E	2028E	2029E
Financial income	499	499	499	499	499
EBT	70,400	74,188	78,366	82,953	87,969
<i>EBT margin %</i>	<i>6.4%</i>	<i>6.4%</i>	<i>6.5%</i>	<i>6.5%</i>	<i>6.6%</i>
Tax expense	-14,784	-15,579	-16,457	-17,420	-18,473
Net Income	55,616	58,609	61,909	65,533	69,495
<i>Net income margin %</i>	<i>5.1%</i>	<i>5.1%</i>	<i>5.1%</i>	<i>5.1%</i>	<i>5.2%</i>

Balance sheet estimated (€)

	2025E	2026E	2027E	2028E	2029E
Cash and equivalents	389,634	497,389	610,720	730,553	857,169
Inventory	330,089	346,594	363,924	382,120	401,226
Government receivables	22,191	23,301	24,466	25,689	26,974
Accruals and deferrals	6,844	7,186	7,546	7,923	8,319
Other receivables	129,087	135,541	142,318	149,434	156,905
Total current assets	877,845	1,010,011	1,148,973	1,295,718	1,450,593
Fixed operating assets	868,053	798,186	724,318	646,451	564,583
Long-term financial assets	2,260	2,260	2,260	2,260	2,260
Total non-current assets	870,313	800,446	726,578	648,711	566,843
Total assets	1,748,158	1,810,457	1,875,551	1,944,429	2,017,436
Accounts payable	4,800	5,729	6,015	6,316	6,632
Government payable	18,927	19,873	20,867	21,911	23,006
Other payable	36,298	38,113	40,019	42,020	44,121
Total current liabilities	60,025	63,715	66,901	70,246	73,758
Total liabilities	60,025	63,715	66,901	70,246	73,758

Balance sheet estimated (€)

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	2025E	2026E	2027E	2028E	2029E
Common stock	20,000	20,000	20,000	20,000	20,000
Retained earnings	793,801	849,417	908,025	969,934	1,035,467
Other equity items	818,716	818,716	818,716	818,716	818,716
Net income	55,616	58,609	61,909	65,533	69,495
Total equity	1,688,133	1,746,742	1,808,651	1,874,183	1,943,678
Total liabilities + equity	1,748,158	1,810,457	1,875,551	1,944,429	2,017,436

Cash-flow statement estimated (€)

	2025E	2026E	2027E	2028E	2029E
Net income	55,616	58,609	61,909	65,533	69,495
(+) Depreciation & amortization expenses	85,868	89,868	93,868	97,868	101,868
Δ to net working capital	126,602	-20,721	-22,445	-23,568	-24,746
Operational cash-flow	268,085	127,755	133,331	139,832	146,617
Δ long-term financial investment	0	0	0	0	0
CAPEX	-20,000	-20,000	-20,000	-20,000	-20,000
Cash-flow after investment	248,085	107,755	113,331	119,832	126,617
Δ equity	0	0	0	0	0
Cash-flow after financing	248,085	107,755	113,331	119,832	126,617
Cash balance	389,634	497,389	610,720	730,553	857,169

