

# Orosur Mining, Inc. OMI

**Last Close**

63.00p

**Shares Issued**

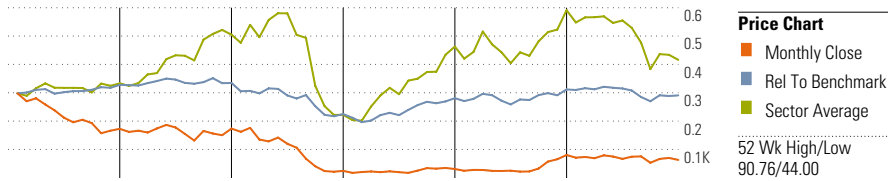
77,980,000

**Listed Exchange**

LSE AIM

**Benchmark**

FTSE AIM All Share



	2006	2007	2008	2009	2010	2011
Annual Price High	304.00	190.45	181.02	39.18	82.58	90.76
Annual Price Low	149.28	128.95	14.38	15.37	20.33	44.00

**Borrowings**

		2009	2010	2011
Total Debt	£m	0.02	0.02	0.01
Due < 1 Yr	£m	0.02	0.01	0.01
1-2 Yrs	£m	-	0.00	-
2-5 Yrs	£m	-	0.00	-
> 5 Yrs	£m	-	0.00	-
Net Gearing	%	-18.00	-13.95	-17.94
Gross Gearing	%	0.07	0.05	0.02
Cash	%	18.07	14.00	17.96
Interest Cover	%	-	-1.29	82.34
Quick Ratio	r	1.64	1.06	1.44
Current Ratio	r	3.82	2.63	2.84

**Activities**

Gold production and exploration company

**Share Stats**

Market Cap	£m	49
NMS		3,500
Shares In Issue	m	78
(m)		Com Shs Npv
Beta Volatility		2.45

**5 Year CAGR**

	%
Revenue	12.11
Pre-tax Profit	6.60
Norm EPS	11.24
DPS	-

**1st Quarter Results**

		2010	2011	Latest
Revenue	£m	7.66	11.39	12.91
Pre-Tax	£m	-1.33	2.54	2.78
EPS	p	-2.45	3.13	3.69
DPS	p	0.00	0.00	-

**Relative Strength**

	%
1 Month	-9.40
3 Months	12.53
6 Months	3.04
1 Year	-22.21

**Growth**

		2010	2011	Latest
Revenue	%	-21.40	48.78	13.35
Pre-Tax	%	-16.17	-291.33	9.57
EPS	%	-25.68	-227.58	17.84
DPS	%	-	-	-

**Ratios**

		Co.	Sector	Market
PER (pr)	x	-	8.49	11.15
DY (pr)	%	-	2.89	4.23
PEG (pr)	f	-	-0.52	0.48
ROCE	%	39.29	24.80	30.27
Op. Margin	%	28.07	30.69	8.09
EPS Growth	%	-	2.05	8.25
EV/EBITDA	x	2.22	7.75	19.46
Net Gearing	%	-17.94	17.63	53.39
NAV PS	p	49.21	4.53	2.12
PTBV	x	1.28	2.61	-0.73
PCF	x	2.17	23.01	12.71
PSR	x	0.86	2.84	2.49

**Year End 31- May**

			Actual							Forecast	
			2006	2007	2008	2009	2010	2011			
Revenue	£m	-	27	32	40	39	41	48	-	-	
Non Domestic Market	£m	-	27	-	-	-	-	-	-	-	
EBITDA	£m	-	12	14	18	5	6	18	-	-	
EBIT	£m	-	7	10	10	-8	0	13	-	-	
Operating Profit	£m	-	7	9	4	-9	0	10	-	-	
Norm. Pre-Tax	£m	-	7	10	10	-8	0	13	-	-	
Reported Pre-Tax	£m	-	7	9	4	-9	0	10	-	-	
Norm EPS	p	-	11.66	17.25	19.39	-14.41	1.23	19.86	-	-	
Norm EPS Growth	%	-	-	48.00	12.43	-	-	1520.96	-	-	
Reported EPS	p	-	11.66	15.04	8.02	-17.81	2.05	14.46	-	-	
Reported EPS Growth	%	-	-	29.02	-46.68	-	-	605.81	-	-	
DPS	p	-	1.86	0.00	1.00	-	0.00	-	-	-	
DPS Growth	%	-	-	-	-	-	-	-	-	-	
Div Yield	%	-	-	-	-	-	-	-	-	-	
Div Cover	x	-	6.28	-	19.36	-	-	-	-	-	
Operating Margin	%	-	24.94	30.98	24.32	-19.52	-0.54	28.07	-	-	
ROCE	%	-	33.96	40.12	31.31	-28.69	-0.80	39.29	-	-	
ROE	%	-	22.56	26.52	27.07	-21.04	1.13	26.59	-	-	
PER	x	-	-	-	-	-	-	3.17	-	-	
PEG	f	-	-	-	-	-	-	0.00	-	-	
NAV PS	p	-	36.00	46.02	59.55	50.62	39.20	49.21	-	-	
Cash Flow Per Share	p	-	20.87	26.34	27.13	8.90	14.42	29.03	-	-	
CAPEX PS	p	-	19.16	20.18	19.59	19.66	15.46	24.15	-	-	
Net Borrowings	£m	-	-3	-5	-8	-6	-6	-9	-	-	
Net Assets	£m	-	24	31	34	33	43	48	-	-	

"Data for this company updated from RNA as of 1st March 2008 & results announcement as of 1st April 2008". Figures in accordance with FRS3. USD to GBP, 2008: 1.97940; 2009: 1.61520, 2010: 1.45300, 2011: 1.6466

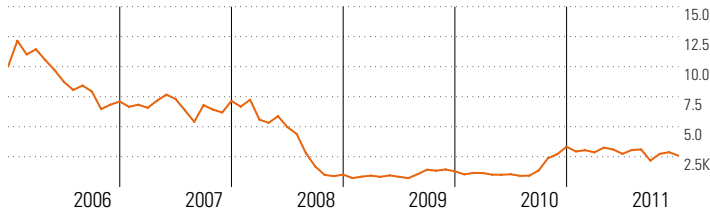
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**Performance Chart**  
Growth Of 10K

## Key Dates

Next AGM	18/10/2012
Next Q1 announcement	12/10/2012
Next annual report due	16/08/2012
Next prelim announcement	16/08/2012
Next year end (to be reported)	31/05/2012
Next Q3 announcement	13/04/2012
Next interim announcement	12/01/2012
Last AGM	18/10/2011
Last Q1 announcement	13/10/2011
Last Q1 period end	31/08/2011

## Directors Information

		Shares 3m	Remuneration Committee	Yr Chg %
David Fowler	ceo	239.95 k ▲	582,303	158.18
Pedro Salazar	fd	173.00 k ▲	499,010	199.58
Luis Tondo	coo	▲	441,210	-
Ralph Browning *		65.00 k ▲	130,552	-
Mario Caron *	ch	78.00 k ▲	111,076	115.55
Julio Porteiro *		77.00 k ▲	62,905	126.38
Dr. Bill Lindqvist *		58.00 k ▲	59,958	90.95
Roger Davey *		23.50 k ▲	59,221	88.60
Gijsbert Groenewegen *		▲	-	-
<b>Total</b>		<b>714.45 k</b>	<b>1,946,235</b>	<b>779.24</b>

\* Denotes non-executive director

## Major Shareholders

	Stake %
<b>Total</b>	<b>0.00</b>

## Advisers

Broker	Canaccord Genuity Limited
Financial	Canaccord Genuity Limited
Advisor	
Auditor	PricewaterhouseCoopers
Financial PR	Blythe Weigh Communications
Solicitor	Cobbetts LLP
	Fasken Martineau LLP

## Detailed Broker Forecast

	Date	Rec	Pre-Tax	EPS	DPS	Pre-Tax	EPS	DPS
<b>Consensus</b>		-	-	-	-	-	-	-
1m Change		-	-	-	-	-	-	-
3m Change		-	-	-	-	-	-	-

## Revenue Analysis

Geographical	Latest %	Last %	Product	Latest %	Last %
Uruguay	100.00	100.00	Gold	100.00	100.00
			Exploration Uruguay	0.00	0.00
			Exploration Chile	0.00	0.00

## Company Contact

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Fax	
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Registrar	Computershare Investor Services PLC
Registrar Telephone	(0870) 702 0003

## Latest News

01/12/2011	Appointment of Joint Bank Adviser
09/11/2011	Update on Pantanillo project in Chile
19/10/2011	Result of Annual and Special Meeting
13/10/2011	no outlook statement
14/09/2011	Gijsbert Groenewegen appointed
30/08/2011	Acquisition of 100% interest in Talca gold property
08/08/2011	Appointment of Nominated Adviser and Broker
09/06/2011	Acquisition of Talca gold property
09/06/2011	Issue of equity