

Orosur Mining Inc OMI

Last Close

33.50p

Shares Issued

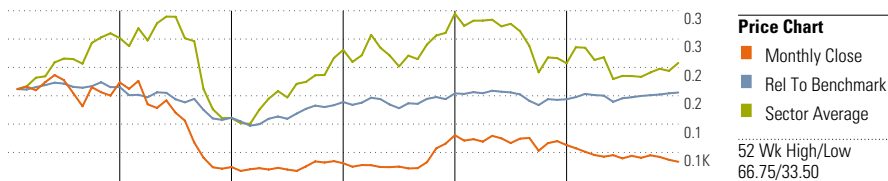
78,168,000

Listed Exchange

LSE AIM

Benchmark

FTSE AIM All Share



	2007	2008	2009	2010	2011	2012
Annual Price High	190.45	181.02	39.18	82.58	90.76	66.75
Annual Price Low	128.95	14.38	15.37	20.33	44.00	33.50

Price Chart

■ Monthly Close
■ Rel To Benchmark
■ Sector Average
 52 Wk High/Low
 66.75/33.50

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	x	-	-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	26
NMS		5,000
Shares In Issue	m	78
(m)		Com Shs Npv
Beta Volatility		1.3

5 Year CAGR

	%
Revenue	13.81
Pre-tax Profit	-22.81
Norm EPS	-8.66
DPS	-

1st Quarter Results

		2011	2012	Latest
Revenue	£m	11.39	12.91	16.58
Pre-Tax	£m	2.54	2.78	1.58
EPS	p	3.13	3.69	1.88
DPS	p	0.00	0.00	0.00

Relative Strength

	%
1 Month	-9.00
3 Months	-27.77
6 Months	-24.31
1 Year	-52.57

Growth

		2011	2012	Latest
Revenue	%	48.78	13.35	28.39
Pre-Tax	%	-291.33	9.57	-43.39
EPS	%	-227.58	17.97	-48.98
DPS	%	-	-	-

Ratios

		Co.	Sector	Market
PER (pr)	x	1.57	12.11	12.37
DY (pr)	%	-	2.90	4.00
PEG (pr)	f	0.03	0.36	1.60
ROCE	%	-	28.68	-0.14
Op. Margin	%	-	29.92	-60.62
EPS Growth	%	49.67	10.22	11.44
EV/EBITDA	x	-	5.35	6.18
Net Gearing	%	-	26.27	20.39
NTAV PS	p	-	5.14	1.93
PTBV	x	-	2.63	-0.01
PCF	x	-	6.47	10.95
PSR	x	-	2.45	2.51

Year End 31- May

		Actual						Forecast			
		2006	2007	2008	2009	2010	2011	2012	2013	2014	
Revenue	£m	-	27	32	40	39	41	48	61	72	81
Non Domestic Market	£m	-	27	-	-	-	-	-	-	-	-
EBITDA	£m	-	12	14	18	5	6	18	-	25	29
EBIT	£m	-	7	10	10	-8	0	13	-	16	19
Operating Profit	£m	-	7	9	4	-9	0	10	-	-	-
Norm. Pre-Tax	£m	-	7	10	10	-8	0	13	-	16	19
Reported Pre-Tax	£m	-	7	9	4	-9	0	10	2	-	-
Norm EPS	p	-	11.66	17.25	19.39	-14.41	1.23	19.86	10.97	16.54	24.67
Norm EPS Growth	%	-	-	48.00	12.43	-	-	1520.96	-44.77	50.85	49.12
Reported EPS	p	-	11.66	15.04	8.02	-17.81	2.05	14.46	1.30	-	-
Reported EPS Growth	%	-	-	-	-	-	-	-91.02	-	-	-
DPS	p	-	1.86	0.00	1.00	-	0.00	-	0.00	-	7.68
DPS Growth	%	-	-	-	-	-	-	-	-	-	-
Dividend Yield	%	-	-	-	-	-	-	0.00	-	-	22.93
Div Cover	x	-	6.28	-	19.36	-	-	-	-	-	3.21
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	-	-	-	-	-	-	3.06	2.03	1.36	
PEG	f	-	-	-	-	-	-	-0.07	0.04	0.03	
NAV PS	p	-	36.00	46.02	59.55	50.62	39.20	49.21	-	92.62	105.67
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

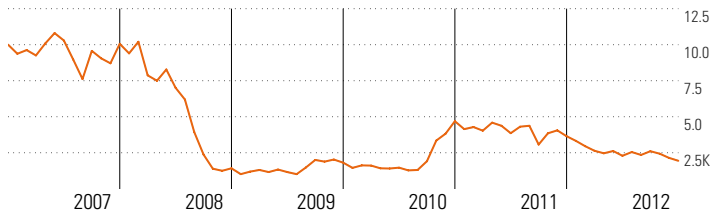
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Performance Chart

Growth Of 10K

Key Dates

Next AGM	28/11/2013
Next Q1 announcement	15/10/2013
Next prelim announcement	15/08/2013
Next Q3 announcement	13/04/2013
Next interim announcement	11/01/2013
Last AGM	28/11/2012
Next annual report due	28/11/2012
Last Q1 announcement	15/10/2012
Last Q1 period end	31/08/2012
Last prelim announcement	15/08/2012

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
Julio Porteiro *		77.00 k ▲	62,905	126.38
Roger Davey *		23.50 k ▲	59,221	88.60
Tony Shearer *	ch	▲	19,538	-
Dr Eric Roth *		▲	-	-
Total		513.45 k	1,222,977	572.74

* Denotes non-executive director

Major Shareholders

	Stake %
Total	0.00

Advisers

Broker	Canaccord Genuity Seymour Pierce
Financial Advisor	Canaccord Genuity
Auditor	PricewaterhouseCoopers
Financial PR	Blythe Weigh Communications
Solicitor	Fasken Martineau LLP Gowlings (UK) LLP

Detailed Broker Forecast

	Date	Rec	2013			2014		
			Pre-Tax	EPS	DPS	Pre-Tax	EPS	DPS
Canaccord Genuity Ltd	07/12/2012	BUY	-	14.92	-	-	28.61	-
Seymour Pierce	03/12/2012	BUY	16	18.24	-	19	20.55	7.68
Consensus			16	16.54	-	19	24.67	7.68
1m Change			0	-1.33	-	0	+0.63	0.00
3m Change			+4	+1.24	-	-2	+3.63	+7.68

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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Registrar Telephone	(0870) 702 0003

Latest News

07/12/2012	Production update
18/10/2012	Luis Tondo leaves board
15/10/2012	no outlook statement
11/10/2012	Dr Eric Roth appointed
15/08/2012	Exploration and development update
06/08/2012	Anthony Shearer appointed
06/08/2012	Ralph Browning leaves board
06/08/2012	Gijsbert Groenewegen leaves board
06/08/2012	Dr. William Lindqvist leaves board