

Revive Therapeutics Ltd RVV

Last Close
19 Jan 2018
0.39

Fair Value^Q
22 Jan 2018 02:00 UTC
0.38

Market Cap
19 Jan 2018
21.0 Mil

Sector
Healthcare

Industry
Biotechnology

Country of Domicile
CAN Canada

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Company Profile

Revive Therapeutics Ltd is engaged in the development and commercialization of drugs for underserved medical needs.

Quantitative Scores

		Scores		
		All	Rel Sector	Rel Country
Quantitative Moat	None	43	45	47
Valuation	Fairly Valued	65	53	67
Quantitative Uncertainty	Very High	41	42	71
Financial Health	Moderate	51	35	54



Undervalued | Fairly Valued | Overvalued

Source: Morningstar Equity Research

Valuation			Sector Median	Country Median
	Current	5-Yr Avg		
Price/Quant Fair Value	1.02	0.78	1.02	1.05
Price/Earnings	—	—	28.2	16.2
Forward P/E	—	—	11.8	13.2
Price/Cash Flow	—	—	19.0	9.6
Price/Free Cash Flow	—	—	26.4	16.0
Trailing Dividend Yield %	—	—	1.30	3.20
Price/Book	17.5	—	3.7	2.0
Price/Sales	—	—	4.2	2.7

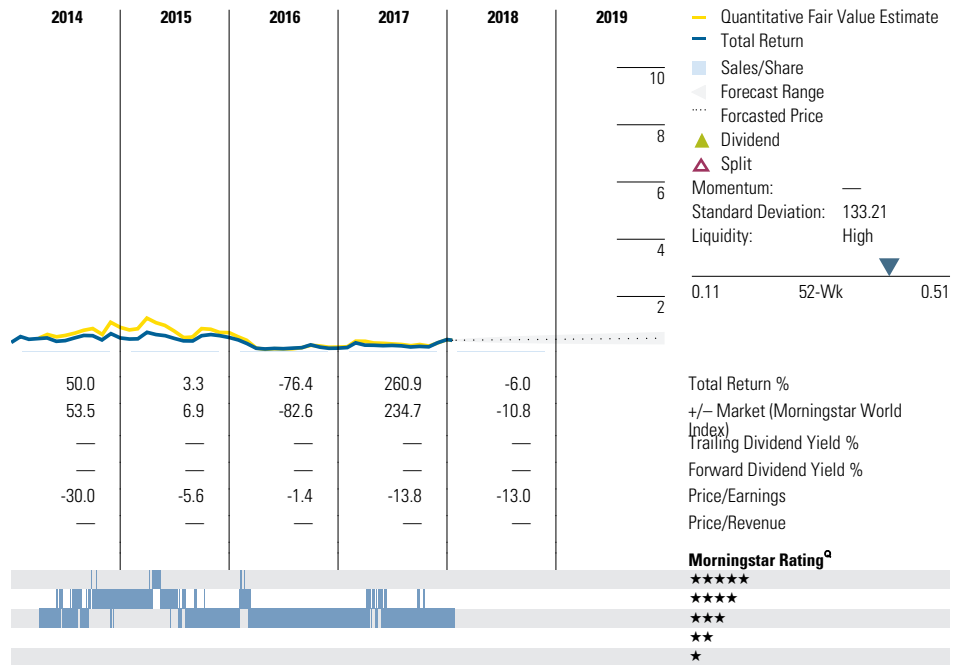
Profitability			Sector Median	Country Median
	Current	5-Yr Avg		
Return on Equity %	-120.4	—	12.8	11.2
Return on Assets %	-89.6	—	6.5	4.5
Revenue/Employee (K)	—	—	326.2	408.3

Financial Health			Sector Median	Country Median
	Current	5-Yr Avg		
Distance to Default	0.5	0.6	0.6	0.5
Solvency Score	—	—	525.0	563.0
Assets/Equity	1.2	1.5	1.4	1.2
Long-Term Debt/Equity	—	—	0.1	0.2

Growth Per Share

	1-Year	3-Year	5-Year	10-Year
Revenue %	0.0	—	—	—
Operating Income %	—	—	—	—
Earnings %	—	—	—	—
Dividends %	—	—	—	—
Book Value %	70.7	-17.7	—	—
Stock Total Return %	254.5	-6.1	—	—

Price vs. Quantitative Fair Value

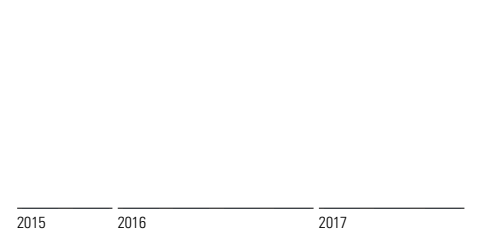


	2013	2014	2015	2016	2017	TTM	Financials (Fiscal Year in K)
Revenue	—	0	0	—	—	—	Revenue
% Change	—	—	—	—	—	—	% Change
Operating Income	—	-908	-2,031	-2,698	-1,676	-1,760	Operating Income
% Change	—	—	—	—	—	—	% Change
Net Income	—	-1,257	-2,031	-2,738	-1,616	-1,700	Net Income
Operating Cash Flow	—	-768	-1,493	-1,987	-2,081	-1,804	Operating Cash Flow
Capital Spending	—	-32	-38	-2	-2	-2	Capital Spending
Free Cash Flow	—	-800	-1,531	-1,988	-2,083	-1,805	Free Cash Flow
% Sales	—	—	—	—	—	—	% Sales
EPS	—	-0.06	-0.07	-0.11	-0.03	-0.03	EPS
% Change	—	—	—	—	—	—	% Change
Free Cash Flow/Share	—	—	-0.06	-0.07	-0.05	-0.04	Free Cash Flow/Share
Dividends/Share	—	—	—	—	—	—	Dividends/Share
Book Value/Share	—	—	0.10	0.01	0.04	0.02	Book Value/Share
Shares Outstanding (K)	23,542	30,465	30,465	47,747	53,894	53,894	Shares Outstanding (K)
Profitability	—	-99.4	-112.0	-186.9	-148.0	-120.4	Profitability
Return on Equity %	—	-93.6	-101.3	-135.1	-97.6	-89.6	Return on Equity %
Return on Assets %	—	—	—	—	—	—	Return on Assets %
Net Margin %	—	—	—	—	—	—	Net Margin %
Asset Turnover	—	—	—	—	—	—	Asset Turnover
Financial Leverage	—	—	—	—	—	—	Financial Leverage
Gross Margin %	—	—	—	—	—	—	Gross Margin %
Operating Margin %	—	—	—	—	—	—	Operating Margin %
Long-Term Debt	—	—	—	—	—	—	Long-Term Debt
Total Equity	—	1,265	2,362	569	1,615	1,200	Total Equity
Fixed Asset Turns	—	—	—	—	—	—	Fixed Asset Turns

Quarterly Revenue & EPS

Revenue (€)	Sep	Dec	Mar	Jun	Total
2017	—	—	—	—	—
2016	0.0	0.0	—	—	—
2015	0.0	0.0	0.0	0.0	0.0
2014	0.0	0.0	0.0	0.0	0.0
Earnings Per Share (€)					
2017	-0.01	-0.01	-0.01	-0.01	-0.03
2016	-0.03	-0.02	-0.02	-0.04	-0.11
2015	-0.02	-0.02	-0.02	-0.02	-0.07
2014	-0.06	-0.03	-0.02	-0.06	-0.06

Revenue Growth Year On Year %



Quantitative Equity Reports Overview

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i. **Quantitative Fair Value Estimate:** Intended to represent Morningstar's estimate of the per share dollar amount that a company's equity is worth today. Morningstar calculates the Quantitative Fair Value Estimate using a statistical model derived from the Fair Value Estimate Morningstar's equity analysts assign to companies. Please go to <http://global.morningstar.com/equitydisclosures> for information about Fair Value Estimate Morningstar's equity analysts assign to companies.

ii. **Quantitative Economic Moat:** Intended to describe the strength of a firm's competitive position. It is calculated using an algorithm designed to predict the Economic Moat rating a Morningstar analyst would assign to the stock. The rating is expressed as Narrow, Wide, or None.

Narrow – assigned when the probability of a stock receiving a "Wide Moat" rating by an analyst is greater than 70% but less than 99%.

Wide – assigned when the probability of a stock receiving a "Wide Moat" rating by an analyst is greater than 99%.

None – assigned when the probability of an analyst receiving a "Wide Moat" rating by an analyst is less than 70%.

iii. **Quantitative Star Rating:** Intended to be the summary rating based on the combination of our Quantitative Fair Value Estimate, current market price, and the Quantitative Uncertainty Rating. The rating is expressed as One-Star, Two-Star, Three-Star, Four-Star, and Five-Star.

One-Star – the stock is overvalued with a reasonable margin of safety.

*Log (Quant FVE/Price) < -1*Quantitative Uncertainty*

Two-Star - the stock is somewhat overvalued.

*Log (Quant FVE/Price) between (-1*Quantitative Uncertainty, -0.5*Quantitative Uncertainty)*

Three-Star – the stock is approximately fairly valued.

*Log (Quant FVE/Price) between (-0.5*Quantitative Uncertainty, 0.5*Quantitative Uncertainty)*

Four-Star – the stock is somewhat undervalued.

*Log (Quant FVE/Price) between (0.5*Quantitative Uncertainty, 1*Quantitative Uncertainty)*

Five-Star – the stock is undervalued with a reasonable margin of safety.

*Log (Quant FVE/Price) > 1*Quantitative Uncertainty*

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Low – the interquartile range for possible fair values is less than 10%

Medium – the interquartile range for possible fair values is less than 15% but greater than 10%

High – the interquartile range for possible fair values is less than 35% but greater than 15%

Very High – the interquartile range for possible fair values is less than 80% but greater than 35%

Extreme – the interquartile range for possible fair values is greater than 80%

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Moderate – assigned when Quantitative Financial Health is between 0.2 and 0.7

Strong – assigned when Quantitative Financial Health > 0.7

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