

Due Diligence and Valuation Report

Arrowhead code: 75-05-01
Coverage initiated: 29-Jul-2021
This document: 29-Jul-2021
Fair share value bracket: CAD 1.42 to CAD 1.74
(Blended Valuation)
Share Price (28 July): CAD 0.65

Analyst Team

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Market Data

52-Week Range:	CAD 0.125 - CAD 1.43
Average Daily Volume:	374k
Market Cap. on date:	CAD 295.7 million

Financial Forecast (in CAD mn) (FY Ending - Dec)

	21P	22P	23P	24P	25P
RE (mn)	4.9	18.1	41.2	66.9	89.7
EPS (CAD)	0.01	0.04	0.09	0.15	0.20

Company Overview

Voxtur Analytics Corp. ("Voxtur" or "the Company"), previously LOOKABOUT, is a Real Estate Technology ("RealTech") Company which operates a proprietary web-based enterprise platform and database that improve cost and operational efficiency for real estate investors, lenders, government agencies, and servicers, by modernizing transaction processes and improving access to high-quality data and analytics.

Voxtur offers tech-enabled services and software solutions in three areas - Tax Assessment, Property Valuation, and Transaction Settlement (Title Services). It has one of the largest real-time property databases in North America and is working on further expanding its database as well as adding new functionalities to its platform by further leveraging the database.

Over the years, the Company has invested significantly in developing a promising suite of technology solutions and these solutions now enjoy significant market traction. The Company is now preparing for a major sales & marketing push to establish itself as a dominant player in the US market.

Key Highlights

1. Voxtur is highly acquisitive, having completed five acquisitions since 2019, including three in 2021 alone. The Company has a healthy M&A pipeline and a strong cash position. It plans to continue making strategic acquisitions with the triple objective of expanding its database, adding complementary technology solutions

Company: Voxtur Analytics Corp.
Ticker: TSXV: VXTR
Headquarters: Toronto, Canada
CEO: Jim Albertelli
Chairman: Gary Yeoman
Website: www.voxtur.com

to its portfolio, and generating lucrative cross-selling opportunities.

2. Current marketing conditions are favorable for the Company's growth, with Real Estate players accelerating their adoption of innovative technology solutions to overcome inherent inefficiencies in property transaction processes.
3. Companies like Voxtur that earn a significant share of their revenue from property foreclosures are also expected to benefit from the impending moratorium withdrawal on certain categories of Real Estate loans in the US. The imposition of this moratorium in the aftermath of the COVID-19 outbreak adversely impacted several similar businesses. But with the moratorium likely to be lifted on July 31, 2021, the volume of foreclosure-related work, such as property valuation, is likely to increase sharply.

Key Risks

Voxtur benefits from its staunch technology base, a strong management team, and a highly conducive macroeconomic environment. However, it operates in an industry with rapidly evolving technology where companies can quickly lose their competitive advantage. Voxtur's customer risk has traditionally been high since it has over-relied on a couple of customers. The Company has recently signed service contracts that lower its revenue concentration. However, this lower customer concentration cannot be considered sustainable until new customers settle in and start generating stable, predictable revenues. We, therefore, believe that Voxtur's risk profile is medium.

Valuation & Assumptions

Based on its due diligence and valuation estimates, Arrowhead believes that Voxtur's fair share value lies in the CAD 1.42 to CAD 1.74 bracket, which has been calculated using a Blended valuation method; with 50% weighting to a DCF method and 50% weighting to a Comparable Companies Valuation method. Our DCF model suggests a fair value of CAD 1.72, while a relative valuation provides a fair value of CAD 1.44.

Format Of Due Diligence Report

K Morrison



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Due Diligence in Business Transactions Gary M. Lawrence, 2024-11-28 This desk book presents a complete overview of the due diligence process and gives attorneys legal assistants and allied professionals the tools they need to conduct more efficient investigation

Due Diligence in China Kwek Ping Yong, 2013-08-22 A plain English guide that demystifies the business landscape in China from a due diligence point of view Due diligence is crucial to any business deal and thankfully due diligence research has come a long way over the years What used to be a cumbersome time consuming process has been standardized and systemized with generally accepted auditing frameworks and tools such as the all important auditing checklists But when it comes to doing due diligence in China with its opaque regulatory system and byzantine accounting standards all bets are off In this book an acknowledged expert in the field takes you beyond the checklists to arm you with China specific due diligence strategies tools and techniques that go beyond what is typically part of the process Gives a detailed account of why conventional frameworks used in the west simply don't work in China Provides first hand accounts based on the author's years of experience as a private equity professional doing deals in China Reviews in depth the unique differences between corporations and businesses in China and those in the West and their implications for the due diligence process Uses numerous case studies to guide the reader through an entire due diligence process for a firm in China

Due Diligence Peter Howson, 2017-07-05 How can you be sure you are buying the company you think you are Are you sure it is as good as the seller says How can you be certain unexpected costs and obligations will not suddenly appear once you are the owner and responsible for them How best can you arm yourself for the negotiations Have you worked out precisely what you are going to do with it once it is yours How do you set the priorities for change to recoup the premium you have paid for it The answer to all these questions and many more lies with effective due diligence Due diligence is one of the most important but least well understood aspects of the acquisition process It is not as many believe a chore to be left to the accountants and lawyers To get the best from it due diligence has to be properly planned and professionally managed This book is a comprehensive manual on getting due diligence right It is a uniquely comprehensive guide covering all aspects of the process from financial legal and commercial due diligence right through to environmental and intellectual property due diligence There are also useful chapters on working with advisers and managing due diligence projects It also includes a number of checklists to help ensure that the right questions are asked

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