# J.P.Morgan

#### Tata Steel Ltd

Raise estimates & PT as Europe continues to pick up. while India stabilizes: Could be FCF positive in FY15E

TATA's leverage to a European recovery goes beyond cond EMITDA'T, in our year. Experted EPS could improve sharply to the rates according, and the higher ESSTEA from Europe would likely result in TATA being PCF positive in FY11S. times as we build in cases of -Rall/Stu and no mast sales). Stronger equity market in Europe combined with higher interest stees should sho lend to a better penson utueton Sewer deficts). We purson TATA Europe ESCTDA for PULSE to -5750nm (EMITPA'T -559 T) from -5690nm eather. We see here apode richs to our Europeia entauces: if it) current queeds were to succeia for the Bill year; and by 2f Long product demand recovery starts in CYT-6E. We raise our PT to Rudoll-thereof on PT15 Electrical.

- . Even if current spreads do not suctain, there is significant update to our TATA Except estimates: Juniary was a unique month, in the sense that speeds widered statestidy in States in sted prices incremed, even in the statested prices were follow. We do not expect this to coursion, but we see speak mile to our estimates, presently drives by despeak personially Long cool. TATA has postbindled especity in Long steel in UK, and contamed demand revival of these capacities could drive significant update to our Street-birth estimates. Every -15th'T increase in EECTDA effectively adds. -Build to our PT.
- India should remain steady, we see little risk of any disruption from Slock Communication: We do not use any disruption to TATA is true are operations. Our entage freezen are not building in a hig demotic recovery and hence we expect discount to import parity price to mining, florigh nature. While there are womber about a sharp treat one price full in 102 divining global 1000 used prices below \$500 T, we would highlight that at weaker DOR remains supportive for bound prices, and his there is reposte that to PPP the bound demand not
- . Even with Roll little caper estimate, TATA could turn FCF position. We my not building in most odes and the group investments and Dissum Post are embedded option values in the belonce sheet which could be successed if required. We do not give my value to these.
- \* What to expect in earnings on Feb 12: We expect consolidated EECIDA of 2020 For the company complied conseque of 2027 For while our TATA. Burge EBITDA T is at - \$25 to be concessed at -\$26 T.
- \* Remain OW: TATA remain: the most levered stock to any European recessory and me believe a recessory is NOT not priced into the stock.

To in his year end that	PH IA	Freid	Frital	Person	Fred
and thems the be-	1,000	1.36	1,395	1,000	7,756
Red Prodit (Relate)	- 12	173	200	- 56	170
675 (Feb.	55.46	671.06	10.07	107.50	24.75
Bed Profit growth 7st	601.000	200.7%	2500.000	72.8%	20.0%
ACR	10.7%	100,000	8.8%	164,076	10,7%
PR N	1.5	260	10.6	4.0	3.3
<b>光度扩展</b>	5.5	1.00	18.6	5.8	1.00
BURBITOR IN	4.7	7.6	6.3	311	140

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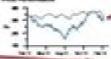
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# **How To Write Equity Research Report**

**Lauren Gardner** 

**How To Write Equity Research Report:** 

#### Reviewing How To Write Equity Research Report: Unlocking the Spellbinding Force of Linguistics

In a fast-paced world fueled by information and interconnectivity, the spellbinding force of linguistics has acquired newfound prominence. Its capacity to evoke emotions, stimulate contemplation, and stimulate metamorphosis is truly astonishing. Within the pages of "**How To Write Equity Research Report**," an enthralling opus penned by a very acclaimed wordsmith, readers set about an immersive expedition to unravel the intricate significance of language and its indelible imprint on our lives. Throughout this assessment, we shall delve in to the book is central motifs, appraise its distinctive narrative style, and gauge its overarching influence on the minds of its readers.

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#### **Table of Contents How To Write Equity Research Report**

- 1. Understanding the eBook How To Write Equity Research Report
  - The Rise of Digital Reading How To Write Equity Research Report
  - Advantages of eBooks Over Traditional Books
- 2. Identifying How To Write Equity Research Report
  - Exploring Different Genres
  - o Considering Fiction vs. Non-Fiction
  - Determining Your Reading Goals
- 3. Choosing the Right eBook Platform
  - Popular eBook Platforms
  - Features to Look for in an How To Write Equity Research Report
  - User-Friendly Interface
- 4. Exploring eBook Recommendations from How To Write Equity Research Report
  - Personalized Recommendations
  - How To Write Equity Research Report User Reviews and Ratings
  - How To Write Equity Research Report and Bestseller Lists

- 5. Accessing How To Write Equity Research Report Free and Paid eBooks
  - How To Write Equity Research Report Public Domain eBooks
  - How To Write Equity Research Report eBook Subscription Services
  - How To Write Equity Research Report Budget-Friendly Options
- 6. Navigating How To Write Equity Research Report eBook Formats
  - o ePub, PDF, MOBI, and More
  - How To Write Equity Research Report Compatibility with Devices
  - How To Write Equity Research Report Enhanced eBook Features
- 7. Enhancing Your Reading Experience
  - Adjustable Fonts and Text Sizes of How To Write Equity Research Report
  - Highlighting and Note-Taking How To Write Equity Research Report
  - Interactive Elements How To Write Equity Research Report
- 8. Staying Engaged with How To Write Equity Research Report
  - Joining Online Reading Communities
  - Participating in Virtual Book Clubs
  - $\circ\,$  Following Authors and Publishers How To Write Equity Research Report
- 9. Balancing eBooks and Physical Books How To Write Equity Research Report
  - Benefits of a Digital Library
  - o Creating a Diverse Reading Collection How To Write Equity Research Report
- 10. Overcoming Reading Challenges
  - o Dealing with Digital Eye Strain
  - Minimizing Distractions
  - Managing Screen Time
- 11. Cultivating a Reading Routine How To Write Equity Research Report
  - Setting Reading Goals How To Write Equity Research Report
  - Carving Out Dedicated Reading Time
- 12. Sourcing Reliable Information of How To Write Equity Research Report
  - Fact-Checking eBook Content of How To Write Equity Research Report
  - Distinguishing Credible Sources
- 13. Promoting Lifelong Learning

- Utilizing eBooks for Skill Development
- Exploring Educational eBooks
- 14. Embracing eBook Trends
  - Integration of Multimedia Elements
  - Interactive and Gamified eBooks

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