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 ESTITIA 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 Rudoli-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 miles to our extraores, pressents drives by despeak personisals 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 devine global 1000 used prices below \$500 T, we would highlight that at weaker DOR remains supportive for bound prices, and its there is reported that to PPP the bound demand not
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- * 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.

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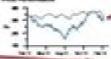
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