Summary: CareFusion Corp. Mar 12

Description:
The ratings on San Diego, Calif.-based medical products manufacturer CareFusion Corp. reflect Standard & Poor's Ratings Services' expectation for 3% to 5% revenue growth in fiscal 2012, in line with company expectations. We believe CareFusion's revenue growth will be largely similar to industry growth for medical products, and will outpace our expectations for 2% U.S. GDP growth in 2012. We expect flat to minimal margin expansion in fiscal 2012, and believe the expansion of profitable dedicated infusion disposables partly will be offset by pricing declines for respiratory and sales losses of nondedicated infusion disposables. We do not believe these select price declines will significantly hurt revenue growth. CareFusion's "satisfactory" business risk profile (according to our criteria) reflects its leading market...

Companies mentioned in this report are: CareFusion Corp.
Action: Review

Standard and Poors RatingsXpress Credit Research provides in-depth coverage of international corporates, financial institutions, insurance companies, utilities, sovereigns and structured finance programs. RatingsXpress Credit Research lets users determine the credit rating of holdings and identify key factors underlying an issuer's creditworthiness, distinguishes the different risk exposures for new and existing deals, and provides an understanding of how their analysts interpret key regulatory, political and environmental events and their economic impact.

This product consists of a Summary Analysis: Bi-annual (at least). An abbreviated analysis containing Standard & Poor's issuer credit ratings as of the time the article was published. The analysis includes a rating rationale - the basis on which the rating was assigned - and an outlook section if the issuer is not on CreditWatch. Financial statistics are not included.

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