Summary: Carriage Services Inc. Dec 12

Description: Abstract
The ratings on Houston-based Carriage Services Inc. reflect the company's "weak" business risk profile, characterized by its narrow focus of its operations in the mature death care industry. Its "highly leveraged" financial risk profile is reflective of its significant debt burden. Carriage Services is a leading provider of funeral and cemetery services and products operating 163 funeral homes across 26 states and 33 cemeteries in 12 states. The company is on track to meet our expectations of mid-single-digit revenue growth. For the nine months ended Sept. 30, 2012, the company's 7% growth rate modestly exceeded our expectations. We continue to expect growth to be primarily driven by Carriage's acquisitive growth strategy, considering the limited organic growth opportunities in the established...

Companies mentioned in this report are:
- Carriage Services Inc.

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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