Summary: Carlisle Cos. Inc. Jan 13

Description: Abstract
The ratings on Charlotte, N.C.-based Carlisle Cos. Inc. reflect the company's "satisfactory" business risk profile and its "intermediate" financial risk profile under Standard & Poor's Ratings Services' criteria. We expect the company to continue its pattern of incurring debt to make acquisitions and paying down that debt relatively quickly to create debt capacity for additional deals. Recently-much-higher levels of EBITDA and free cash flow enable Carlisle to begin reducing acquisition-related debt from its December 2012 purchase of Thermax-Raydex Inc. Carlisle operates in sundry industrial and consumer markets—including roofing systems, special-purpose tires, brakes, and friction products, food service equipment, and wire and cable assemblies. The company benefits from solid competitive positions in many of its niche businesses, good customer diversity, and...

Companies mentioned in this report are: - Carlisle Cos. 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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