Summary: Canadian Oil Sands Ltd. Feb 13

Description:

Abstract
The ratings on Calgary, Alta.-based exploration and production company Canadian Oil Sands Ltd. (COSL) reflect Standard & Poor's Rating Services' assessment of the company's large oil sands resource base, the potential for stable long-term production, and robust operating margins. We believe the possibility of rapidly deteriorating profitability due to the high proportion of fixed costs in the project's operating cost structure offsets these strengths. In addition, the risks associated with oil sands development projects have the potential to weaken COSL's financial risk profile, due to the large capital required to develop and expand these projects. COSL owns 36.74% of Alberta's largest oil sands consortium, the Syncrude project. COSL also owns and operates a U.S. marketing company, Canadian Oil Sands Marketing...

Companies mentioned in this report are:
- Canadian Oil Sands Ltd.

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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