Summary: Carlisle Cos. Inc. Jan 14

Description:

Abstract
Our "BBB" rating on Carlisle Cos. Inc. is derived from: Our anchor of 'bbb+', based on our "satisfactory" business risk and "modest" financial risk profile assessments for the company. The one-notch negative impact of the financial policy modifier on the rating reflects our uncertainty regarding the size of Carlisle's future acquisitions. Recognized brands and good positions in niche markets Aftermarket sales represent two-thirds of total sales Competitive and cyclical end-markets Strategic portfolio strengthened in 2013 Continued performance rebound since 2009 Reduced debt and strong credit metrics Cash accumulation provides funds for meaningful acquisitions The stable outlook incorporates our assumption that Carlisle will continue its acquisition activity to enhance its business portfolio. We believe the internally generated cash from respectable performance...

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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