Summary: Cardinal Health Inc. Jul 12

Description: Abstract
The ratings on Dublin, Ohio-based distributor Cardinal Health Inc. reflect the company's "satisfactory" business risk profile and "modest" financial risk profile. The satisfactory business risk profile incorporates the company's strong market position, favorable industry trends, and improving profitability, as well as its narrow operating focus and some customer concentration. The modest financial risk profile incorporates the company's conservative financial policies and "strong" liquidity. The ratings also reflect Standard & Poor's Ratings Services' expectations for low-single-digit organic revenue growth in fiscal 2012 (in line with year-to-date growth), stable to improving margins, and substantial cash flow. Our revenue growth assumptions are largely in line with our expectations for the industry, as the transition from branded to generic drugs will pressure revenues. We...

Companies mentioned in this report are:
- Cardinal Health Inc.

Action: Review

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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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