Summary: Carpenter Technology Corp. Feb 14

Description:

Abstract
Our 'BBB' rating on Carpenter Technology Corp. is derived from: Our anchor of 'bbb', based on our "satisfactory" business risk and "intermediate" financial risk profile assessments of the company. The modifiers had no impact on the final rating. Good market position in specialty steel long products Established customer relationships Advanced technologies and services capabilities Operates in cyclical, competitive markets that are subject to import competition Moderate financial policies with adjusted leverage consistently below 3x Demonstrated ability to generate cash through the cycle High capital spending program in 2014, decreasing thereafter The stable outlook reflects our assessment that Carpenter's key aerospace and energy markets will rebound over time, resulting in increasing volumes and margins. We believe this growth will enable Carpenter...

Companies mentioned in this report are:
- Carpenter Technology Corp.

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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