Summary: Cameron International Corp. Jul 08

Description:
The rating on Cameron International Corp. reflects the company's solid competitive position as a large manufacturer and supplier of pressure control equipment and services to the oil and gas industry, and its geographically diverse base of operations. The rating is also supported by a consistent track record of free cash flow; a meaningful base of aftermarket sales, which reduces some exposure to industry cyclicality; and a modest financial risk profile. Exposure to historically competitive and cyclical end markets and an acquisitive growth strategy partially temper credit strengths. Pro forma a senior note offering in June 2008, Houston-based Cameron has just more than $1.6 billion in total adjusted debt, including Standard & Poor's Ratings Services' analytical adjustments for operating leases and...

Companies mentioned in this report are:
- Cameron International Corp.

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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