Summary: CareFusion Corp. Mar 14

Description: Abstract
Standard & Poor's Ratings Services derives its 'BBB' corporate credit rating on San Diego, Calif.-based CareFusion Corp. from: Our anchor of 'a-', based on our "satisfactory" business risk and "minimal" financial risk profile assessments for the company. A one-notch downward comparable rating adjustment. A one-notch downward negative financial policy adjustment. Leading positions in the infusion and dispensing products markets. Somewhat more commodity-like product portfolio under Procedural Solutions. Significant scale. Moderate diversity across product categories, but U.S.-focused geographic sales. Technology and regulatory risk. Low debt burden, especially when adjusted for captive finance leasing business. Modest capital spending requirements relative to internal cash generation. Sufficient internal cash generation to repurchase shares and make moderate scale acquisitions. Strong liquidity, although much of the...

Companies mentioned in this report are:
- CareFusion 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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