Summary: Canadian Oil Sands Ltd. Apr 14

Description:

Abstract

Standard & Poor's Ratings Services derives its 'BBB' long-term corporate credit rating on Canadian Oil Sands Ltd. (COSL) from the following factors: Our anchor is 'bbb', based on our "satisfactory" business risk and "intermediate" financial risk profile assessments for the company. All modifiers are neutral to the final rating outcome. The assessment of COSL's business risk profile reflects our view of its large oil sands resource base, the visibility to long-term organic production growth, and a cost structure that is vulnerable to dramatic increases, due to the high component of fixed costs in its total cost structure. We believe the company's financial risk profile benefits from robust cash flow generation relative to fairly moderate debt levels, and a capital spending...

Companies mentioned in this report are:
- Canadian Oil Sands Ltd.

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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