Summary: CareCore National LLC Jan 15

Description:
Abstract
Overall narrow business scope focused on managing radiology and other specialty benefits for health insurance payers; Growing scale and improving market position via recent MedSolutions acquisition; Large client concentrations and insourcing remain key ongoing business risks; Multi-year execution/integration risks related to the MedSolutions acquisition; and Adequate EBITDA margins in the low double-digits. Aggressive financial policies that stem from largely private-equity ownership; High debt leverage tolerance (4.9x following MedSolutions acquisition); and "Adequate" liquidity over the next 12 to 24 months. The positive outlook is based on the potential for a one-notch upgrade during the next 12 months. An upgrade would be based on CareCore's ability to successfully execute its MedSolutions integration plan and meet its financial plan. From a business risk...

Companies mentioned in this report are:
- CareCore National LLC

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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