Summary: Korea Investment & Securities Co. Ltd. Aug 15

Description:

Abstract
Good retail customer base in Korea's securities market Relatively diversified revenue structure compared with domestic peers Adequate capitalization Dependence of its revenue base on the domestic securities market Exposure to market risks, including interest rate risk, given its large fixed-income securities holdings Dependence on wholesale funding The stable outlook on the ratings on Korea Investment & Securities Co. Ltd. (KIS; BBB/Stable/A-2) reflects Standard & Poor's Ratings Services' view that it will likely maintain the current financial profile for the next 18 months. We believe KIS's profitability will likely remain robust, partly helped by a moderate pick-up in domestic securities market turnover. At the same time, we think the company will likely sustain fairly strong asset growth for the coming few...

Companies mentioned in this report are:
- Korea Investment & Securities Co. 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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