Summary: CAMP International Holding Co. Aug 15

Description:
Abstract
Narrow focus on the business jet market; Dependence on jet original equipment manufacturer (OEM) agreements; Small but highly recurring and growing revenue base; and Above-average EBITDA margins. High leverage, with adjusted debt to EBITDA over 10x expected at the end of 2015; Aggressive private equity-driven financial policy; Stable free operating cash flow (FOCF) generation; and Adequate liquidity. The stable outlook on Merrimack, N.H.-based aircraft maintenance tracking and information services provider CAMP International Holding Co. reflects our view that the company's recurring and predictable revenue base should result in sufficient FOCF to meet its debt service payments. We could lower the rating if additional debt or operational issues cause EBITDA interest coverage to approach 1x or threaten the company's liquidity position....

Companies mentioned in this report are:
- CAMP International Holding Co.

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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