China Jinmao Holdings Group Ltd. Dec 15

Description:
Improving but still relatively high project and geographic concentration in the property development business. Satisfactory record of execution. Stable and sizable rental and hotel income supported by good-quality investment properties. Relatively high leverage, albeit moderating, and aggressive growth appetite. Diversified funding sources and low funding costs. Adequate liquidity. The outlook is stable, reflecting our expectation that China Jinmao Holdings Group Ltd. will moderately increase its contracted sales and maintain its stable capital structure and good financial flexibility while pursuing rapid expansion over the next 12 months. Our base case expects a temporary increase in the ratio of debt to EBITDA to slightly above 5x in 2015, before recovering to 4x-5x in 2016. We expect Jinmao to maintain the good asset...

Companies mentioned in this report are:
- China Jinmao Holdings Group Ltd.

Action: Review

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