Summary: CareCore National LLC Feb 16

Description:
Abstract
Overall narrow business scope focused on managing radiology and other specialty benefits for health insurance payors Improved scale and market position via December 2014 acquisition of MedSolutions Large client concentrations and ongoing insourcing risks Health insurer consolidation affecting client base Adequate EBITDA margins in the low double-digits Aggressive financial policies stemming from largely private-equity ownership High debt leverage tolerance (5.2x projected at year-end 2015) Adequate liquidity over the next 12 months The stable outlook on CareCore National LLC reflects Standard & Poor's Ratings Services' expectation that CareCore will complete most of its merger integration by the end of the year and for double-digit revenue and single-digit EBITDA growth in 2016. We expect continued high client retention, stable gross margins (excluding...

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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