

SORIANA

Historial, Cifras en millones de pesos

ESTADO DE SITUACION FINANCIERA	dic-13	dic-14	dic-15	dic-16	dic-17	dic-18	dic-19	dic-20	dic-21	dic-22	dic-23	mar-24
Activo Total	78,952	80,720	101,845	129,077	129,317	132,633	145,700	141,842	142,963	145,245	151,500	150,580
Activo Circulante	23,709	24,579	46,085	36,661	37,848	41,372	46,494	43,744	45,713	45,738	49,096	47,008
Efectivo y Equivalentes de Efectivo	1,666	2,673	22,675	2,718	3,666	2,229	1,921	7,627	9,901	10,280	6,746	4,817
Largo Plazo	55,244	56,141	55,760	92,416	91,470	91,261	99,206	98,097	97,249	99,507	102,404	103,572
Propiedades, Planta y Equipo (Neto)	43,769	44,648	44,199	70,450	69,983	68,729	67,641	66,130	63,840	65,399	67,989	68,811
Pasivo Total	35,553	34,319	51,716	74,778	70,442	70,744	81,695	74,296	72,136	69,354	72,683	70,996
Pasivo Circulante	23,564	22,292	22,556	37,434	38,329	42,589	43,105	37,381	36,467	36,236	37,283	35,370
Créditos Bancarios	850	-	388	4,551	2,421	5,337	4,415	3,890	2,475	-	-	4,900
Créditos Bursátiles	1,098	-	-	-	3,053	3,053	2,414	731	-	2,700	-	-
Pasivo Largo Plazo	11,988	12,027	29,160	37,344	32,113	28,155	38,589	36,915	35,669	33,118	35,400	35,625
Créditos Bancarios	-	-	9,634	12,083	11,154	11,080	15,665	8,265	6,877	6,404	6,034	6,002
Créditos Bursátiles	-	-	7,090	9,236	6,183	3,139	729	6,500	6,500	3,800	6,800	6,800
Otros Pasivos Con Costo	-	-	-	83	66	10	9,613	9,495	9,323	9,800	9,832	10,097
Deuda Total	1,948	-	17,111	25,956	22,940	22,663	23,234	19,386	15,852	12,904	12,834	17,702
Deuda Neta	282	(2,673)	(5,564)	23,238	19,274	20,434	21,313	11,759	5,952	2,624	6,088	12,885
Capital Contable Consolidado	43,400	46,400	50,129	54,299	58,875	61,888	64,006	67,546	70,827	75,892	78,817	79,585
Capital Contable Mayoritario	43,400	46,400	50,129	54,066	58,640	61,630	63,869	67,414	70,694	75,753	78,678	79,440

ESTADO DE RESULTADOS ULTIMOS 12 MESES												
Ventas Netas	105,028	101,829	109,380	149,522	153,632	153,475	155,744	157,053	155,246	166,013	176,120	178,590
Utilidad de Operación	5,573	4,934	5,279	8,335	8,729	7,891	8,985	8,800	8,555	9,193	9,490	9,253
Margen Operativo	5.3%	4.8%	4.8%	5.6%	5.7%	5.1%	5.8%	5.6%	5.5%	5.5%	5.4%	5.2%
Utilidad (Pérdida) Neta Mayoritaria	3,117	3,704	3,726	4,171	4,588	3,685	3,235	3,681	4,331	5,023	5,021	4,740
Margen Neto	3.0%	3.6%	3.4%	2.8%	3.0%	2.4%	2.1%	2.3%	2.8%	3.0%	2.9%	2.7%

RESUMEN DE FLUJO OPERATIVO ULTIMOS 12 MESES												
Utilidad de Operación	5,573	4,934	5,279	8,335	8,729	7,891	8,985	8,800	8,555	9,193	9,490	9,253
Depreciación y Amortizac.	1,976	2,083	2,155	3,464	3,251	2,815	3,159	3,180	3,116	3,240	3,465	3,619
EBITDA	7,548	7,018	7,434	11,799	11,980	10,707	12,144	11,980	11,672	12,433	12,955	12,872
Margen EBITDA	7.2%	6.9%	6.8%	7.9%	7.8%	7.0%	7.8%	7.6%	7.5%	7.5%	7.4%	7.2%
Intereses pagados	280	142	154	1,902	2,453	2,328	3,664	3,124	2,247	2,377	2,852	2,931
Intereses ganados	184	140	177	245	208	210	234	385	436	485	574	377
Impuestos a la Utilidad	2,209	875	1,674	2,353	2,319	1,882	2,036	2,116	2,504	2,036	1,661	1,554
CAPEX	(3,657)	(3,030)	(1,879)	(2,587)	(2,105)	(2,651)	(1,678)	(944)	(1,402)	(3,059)	(5,772)	(6,448)
Flujo Operativo Neto	1,587	3,111	3,904	5,202	5,310	4,056	5,000	6,181	5,955	5,445	3,244	2,315
Variación en el Capital de Trabajo	-2529.428	-269.735	-2201.61	-2,213	-4,129	-7,004	(6,043)	2,149	(375)	(2,842)	(6,140)	(5,473)

MULTIPLOS HISTORICOS Y RAZONES FINANCIERAS												
Valor de mercado	83,765	72,540	71,100	67,549	67,549	41,487	41,379	31,876	43,380	54,360	60,948	58,752
Valor de la empresa	84,047	69,867	65,536	91,078	87,093	62,095	72,893	53,725	59,219	57,083	67,143	71,744
VE/EBITDA	11.13	9.96	8.82	7.72	7.27	5.80	6.00	3.65	4.23	4.59	5.18	5.57
P/U	26.87	19.59	19.08	16.19	14.72	11.51	12.79	8.66	10.02	10.82	12.14	12.39
P/VL	1.93	1.56	1.42	1.25	1.15	0.67	0.65	0.47	0.61	0.72	0.77	0.74
Deuda Neta / EBITDA	0.04	(0.38)	(0.75)	1.97	1.61	1.91	2.59	0.98	0.51	0.21	0.47	1.00
Deuda Neta / (EBITDA+Capex)	0.07	(0.67)	(1.00)	2.52	1.95	2.54	3.00	1.97	1.53	0.28	0.85	2.01
Deuda Neta / C.C.	0.01	(0.06)	(0.11)	0.43	0.33	0.33	0.49	0.32	0.22	0.03	0.08	0.16
Coertura Intereses	26.96	49.45	48.18	6.20	4.88	4.60	3.31	3.83	5.19	5.23	4.54	4.39
ROA	3.9%	4.6%	3.7%	3.2%	3.5%	2.7%	2.2%	2.6%	3.0%	3.5%	3.3%	3.1%
ROE	7.2%	8.0%	7.4%	7.7%	7.8%	5.8%	5.1%	5.4%	6.1%	6.6%	6.4%	6.0%