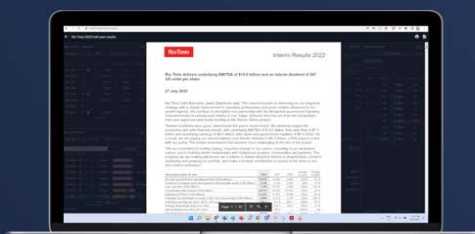


# Reporting Season August 2022

Trade for **Good.**



All figures shown are as of the 4th of August, dates can be revised by the company. Amounts are in AUD.

## 8<sup>th</sup> August – 12<sup>th</sup> August

| Date       | Code | Company                   |      | Sector      | Est. NPAT (\$A) | Est. DPS (\$A) | NPAT (\$A) |
|------------|------|---------------------------|------|-------------|-----------------|----------------|------------|
| Mon 8 Aug  | AZJ  | Aurizon Holdings          | FY22 | Industrials | 513M            | 0.109          |            |
| Mon 8 Aug  | SUN  | Suncorp Group             | FY22 | Financials  | 699M            | 0.23           |            |
| Tue 9 Aug  | REA  | REA Group                 | FY22 | Com. Serv   | 412M            | 0.852          |            |
| Tue 9 Aug  | MP1  | Megaport Ltd              | FY22 | Info Tech   | -39.3M          | -              |            |
| Wed 10 Aug | CBA  | Commonwealth Bank         | FY22 | Financials  | 9.3B            | 2.14           |            |
| Thu 11 Aug | RMD  | ResMed Inc                | Q422 | Health Care | 193.7M          | 0.046 US       |            |
| Thu 11 Aug | AMP  | AMP Ltd                   | HY22 | Financials  | -580M US        | -              |            |
| Thu 11 Aug | AVH  | Avita Medical Inc         | Q222 | Health Care | -               | -              |            |
| Thu 11 Aug | MGR  | Mirvac Group              | FY22 | Real Estate | 576M            | 0.051          |            |
| Thu 11 Aug | TLS  | Telstra Corp              | FY22 | Telco       | 1.67B US        | 0.08           |            |
| Thu 11 Aug | QBE  | QBE Insurance Group       | HY22 | Financials  | 203M US         | 0.055 US       |            |
| Fri 12 Aug | BBN  | Baby Bunting Group        | FY22 | Cons. Disc  | 25.2M           | 0.096          |            |
| Fri 12 Aug | IAG  | Insurance Australia Group | FY22 | Financials  | 248M            | 0.031          |            |

## 15<sup>th</sup> August – 19<sup>th</sup> August

| Date       | Code | Company                      |      | Sector      | Est. NPAT (\$A) | Est. DPS (\$A) | NPAT (\$A) |
|------------|------|------------------------------|------|-------------|-----------------|----------------|------------|
| Mon 15 Aug | ARG  | Argo Investments Ltd         | FY22 | Financials  | -               | -              |            |
| Mon 15 Aug | GPT  | GPT Group                    | HY22 | Real Estate | 275M            | 0.11           |            |
| Mon 15 Aug | JBH  | JB Hi-Fi Ltd                 | FY22 | Cons. Disc  | 544.7M          | 1.388          |            |
| Mon 15 Aug | BEN  | Bendigo & Adelaide Bank      | FY22 | Financials  | 481.6M          | 0.273          |            |
| Mon 15 Aug | GWA  | GWA Group                    | FY22 | Industrials | 41.3M           | 0.07           |            |
| Mon 15 Aug | BSL  | BlueScope Steel Ltd          | FY22 | Materials   | 2.64B           | 0.25           |            |
| Tue 16 Aug | TPW  | Temple & Webster Group       | FY22 | Cons. Disc  | 5.6M            | -              |            |
| Tue 16 Aug | BHP  | BHP Group                    | FY22 | Materials   | 16.4 US         | 1.51 US        |            |
| Tue 16 Aug | CGF  | Challenger Ltd               | FY22 | Financials  | 330M            | 0.113          |            |
| Tue 16 Aug | GOZ  | Growthpoint Properties       | FY22 | Real Estate | 199M            | 0.104          |            |
| Tue 16 Aug | TGR  | Tassal Group Ltd             | FY22 | Con. Staple | 63M             | 0.085          |            |
| Tue 16 Aug | SCP  | Shopping Centres Australasia | FY22 | Real Estate | 189M            | 0.08           |            |
| Tue 16 Aug | SEK  | SEEK Ltd                     | FY22 | Com. Serv   | 250.7M          | 0.227          |            |
| Tue 16 Aug | SWM  | Seven West Media Ltd         | FY22 | Media       | 190M            | -              |            |
| Tue 16 Aug | GMG  | Goodman Group                | FY22 | Real Estate | 1.5B            | 0.15           |            |

**CONT. WEEK 3 – (15<sup>th</sup> August – 19<sup>th</sup> August)**

|            |     |                                |      |             |          |          |
|------------|-----|--------------------------------|------|-------------|----------|----------|
| Wed 17 Aug | RBL | Redbubble Ltd                  | FY22 | Cons. Disc  | -26M     | -        |
| Wed 17 Aug | NEA | Nearmap Ltd                    | FY22 | Info Tech   | -33.8M   | -        |
| Wed 17 Aug | VCX | Vicinity Centres               | FY22 | Real Estate | 600M     | 0.048    |
| Wed 17 Aug | BAP | Bapcor Ltd                     | FY22 | Cons. Disc  | 127.8M   | 0.121    |
| Wed 17 Aug | DOW | Downer EDI Ltd                 | FY22 | Industrials | 208M     | 0.125    |
| Wed 17 Aug | EHL | Emeco Holdings Ltd             | FY22 | Industrials | 76.3M    | 0.022    |
| Wed 17 Aug | CSL | CSL Ltd                        | HY22 | Health Care | 2.26B US | 1.083 US |
| Wed 17 Aug | STO | Santos Ltd                     | HY22 | Energy      | 175M US  | -        |
| Wed 17 Aug | MFG | Magellan Financial Group       | FY22 | Financials  | 399M     | 0.735    |
| Wed 17 Aug | SUL | Super Retail Group Ltd         | FY22 | Cons. Disc  | 223M     | 0.415    |
| Wed 17 Aug | BXB | Brambles Ltd                   | FY22 | Industrials | 566M     | 0.104    |
| Wed 17 Aug | DXS | Dexus                          | FY22 | Real Estate | 705M     | 0.25     |
| Thu 18 Aug | AIA | Auckland International Airport | FY22 | Industrials | -        | -        |
| Thu 18 Aug | ORA | Orora Ltd                      | FY22 | Materials   | 180M     | 0.082    |
| Thu 18 Aug | ASX | ASX Ltd                        | FY22 | Financials  | 508M     | 1.197    |
| Thu 18 Aug | EVN | Evolution Mining Ltd           | FY22 | Materials   | 337M     | 0.05     |
| Thu 18 Aug | RIC | Ridley Corp Ltd                | FY22 | Con. Staple | 37.8M    | 0.034    |
| Thu 18 Aug | TCL | Transurban Group               | FY22 | Industrials | 128M     | 0.202    |
| Thu 18 Aug | IRE | IRESS Ltd                      | HY22 | Info Tech   | 28M      | -        |
| Thu 18 Aug | BKL | Blackmores Ltd                 | FY22 | Con. Staple | 30.2M    | 0.305    |
| Thu 18 Aug | MPL | Medibank Pvt Ltd               | FY22 | Financials  | 407M     | 0.071    |
| Thu 18 Aug | ORG | Origin Energy Ltd              | FY22 | Energy      | 333.6M   | 0.175    |
| Thu 18 Aug | TWE | Treasury Wine Estates Ltd      | FY22 | Con. Staple | 315M     | 0.14     |
| Fri 19 Aug | LFS | Latitude Group Holdings        | HY22 | Financials  | -        | -        |
| Fri 19 Aug | CWY | Cleanaway Waste Management     | FY22 | Industrials | 112.7M   | 0.022    |
| Fri 19 Aug | ING | Inghams Group                  | FY22 | Cons. Disc  | 43.3M    | 0.015    |
| Fri 19 Aug | AGL | AGL Energy Ltd                 | FY22 | Utilities   | 323.8M   | 0.131    |
| Fri 19 Aug | NCM | Newcrest Mining Ltd            | FY22 | Materials   | 843.5M   | 0.16     |
| Fri 19 Aug | COH | Cochlear Ltd                   | FY22 | Health Care | 292M     | 1.473    |
| Fri 19 Aug | SGP | Stockland                      | FY22 | Real Estate | 833.4M   | 0.145    |

**22<sup>nd</sup> August – 26<sup>th</sup> August**

| Date       | Code | Company                    |      | Sector      | Est. NPAT (\$A) | Est. DPS (\$A) | NPAT (\$A) |
|------------|------|----------------------------|------|-------------|-----------------|----------------|------------|
| Mon 22 Aug | ALU  | Altium Ltd                 | FY22 | Info Tech   | 48M US          | -              |            |
| Mon 22 Aug | SGR  | Star Entertainment Group   | FY22 | Cons. Disc  | -36M            | -              |            |
| Mon 22 Aug | ADH  | Adairs Ltd                 | FY22 | Cons. Disc  | 47.3M           | 0.097          |            |
| Mon 22 Aug | ALD  | Ampol Ltd                  | HY22 | Energy      | 460M            | 0.956          |            |
| Mon 22 Aug | LLC  | LendLease Group            | FY22 | Real Estate | 104.8M          | 0.126          |            |
| Mon 22 Aug | SXL  | Southern Cross Media Group | FY22 | Cons. Disc  | 28M             | -              |            |
| Mon 22 Aug | ABC  | Adbri Ltd                  | HY22 | Materials   | 61M             | 0.06           |            |
| Mon 22 Aug | NHF  | NIB Holdings               | FY22 | Financials  | 131M            | 0.095          |            |

**CONT. WEEK 3 – (22nd August –26th August)**

|            |     |                                |      |             |          |          |
|------------|-----|--------------------------------|------|-------------|----------|----------|
| Tue 23 Aug | SCG | Scentre Group                  | HY22 | Real Estate | 467.5M   | 0.075    |
| Tue 23 Aug | BLD | Boral Ltd                      | FY22 | Materials   | 181.7M   | 0.06     |
| Tue 23 Aug | BRG | Breville Group Ltd             | FY22 | Cons. Disc  | 108M     | 0.149    |
| Tue 23 Aug | EHE | Estia Health Ltd               | FY22 | Health Care | -655M    | 0.013    |
| Tue 23 Aug | AWC | Alumina Ltd                    | HY22 | Materials   | 151.7M   | 0.06 US  |
| Tue 23 Aug | MND | Monadelphous Group Ltd         | FY22 | Industrials | 48M      | 0.15     |
| Tue 23 Aug | EDV | Endeavour Group                | FY22 | Con. Staple | 489.5M   | 0.083    |
| Wed 24 Aug | COL | Coles Group Ltd                | FY22 | Con. Staple | 990M     | 0.282    |
| Wed 24 Aug | TAH | Tabcorp Holdings Ltd           | FY22 | Cons. Disc  | 178M     | 0.065    |
| Wed 24 Aug | APA | APA Group                      | FY22 | Utilities   | 317M     | 0.28     |
| Wed 24 Aug | ANN | Ansell Ltd                     | FY22 | Health Care | 162M     | 0.275    |
| Wed 24 Aug | SVW | Seven Group Holdings Ltd       | FY22 | Industrials | 1.57B    | 0.235    |
| Wed 24 Aug | GEM | G8 Education Ltd               | HY22 | Cons. Disc  | -        | -        |
| Wed 24 Aug | DMP | Domino's Pizza Enterprises Ltd | FY22 | Cons. Disc  | 168.6M   | 0.768    |
| Wed 24 Aug | WOR | Worley Ltd                     | FY22 | Energy      | 260M     | 0.271    |
| Wed 24 Aug | WTC | WiseTech Global Ltd            | FY22 | Info Tech   | 177M     | 0.046    |
| Wed 24 Aug | PPT | Perpetual Ltd                  | HY22 | Financials  | 48.5M    | 1.447    |
| Wed 24 Aug | ILU | Iluka Resources Ltd            | HY22 | Materials   | 319M     | 0.312    |
| Wed 24 Aug | SHL | Sonic Healthcare Ltd           | FY22 | Health Care | 1.37B    | 0.573    |
| Thu 25 Aug | SKC | SkyCity Entertainment Group    | FY22 | Cons. Disc  | -        | -        |
| Thu 25 Aug | S32 | South32 Ltd                    | FY22 | Materials   | 1.75B US | -        |
| Thu 25 Aug | WOW | Woolworths Group Ltd           | FY22 | Con. Staple | 1.5B     | 0.494    |
| Thu 25 Aug | NEC | Nine Entertainment Co          | FY22 | Com. Serv   | 342.8M   | 0.06     |
| Thu 25 Aug | APX | Appen Ltd                      | HY22 | Info Tech   | 4.5M     | 0.055 US |
| Thu 25 Aug | CHC | Charter Hall Group             | FY22 | Real Estate | 530.5M   | 0.204    |
| Thu 25 Aug | AKE | Allkem Ltd                     | FY22 | Materials   | 297M US  | -        |
| Thu 25 Aug | WHC | Whitehaven Coal Ltd            | FY22 | Energy      | -        | -        |
| Thu 25 Aug | SBM | St Barbara Ltd                 | FY22 | Materials   | 35.2M    | -        |
| Thu 25 Aug | CMW | Cromwell Property Group        | HY22 | Real Estate | 103M     | 0.03     |
| Thu 25 Aug | IFL | Insignia Financial Ltd         | FY22 | Financials  | 39M      | 0.111    |
| Thu 25 Aug | FLT | Flight Centre Travel Group     | FY22 | Cons. Disc  | -256M    | -        |
| Thu 25 Aug | QAN | Qantas Airways Ltd             | FY22 | Industrials | -855.8M  | -        |
| Thu 25 Aug | QUB | Qube Holdings Ltd              | FY22 | Industrials | 159M     | 0.034    |
| Thu 25 Aug | ALG | Ardent Leisure Group           | FY22 | Cons. Disc  | -45M     | -        |
| Fri 26 Aug | WES | Wesfarmers Ltd                 | FY22 | Cons. Disc  | 2.2B     | 0.845    |
| Fri 26 Aug | BWX | BWX Ltd                        | FY22 | Con. Staple | -14.2M   | -        |
| Fri 26 Aug | MVF | Monash IVF Group               | FY22 | Health Care | 20.6M    | 0.021    |
| Fri 26 Aug | CGC | Costa Group Holdings           | HY22 | Con. Staple | 53.8M    | 0.045    |
| Fri 26 Aug | RHC | Ramsay Health Care Ltd         | FY22 | Health Care | 325.8M   | 0.706    |
| Fri 26 Aug | CYG | Coventry Group                 | FY22 | Industrials | 7.3M     | -        |
| Fri 26 Aug | MYX | Mayne Pharma Group             | FY22 | Health Care | -71.5M   | -        |

## 29<sup>th</sup> August – 31<sup>st</sup> August

| Date       | Code | Company                        |      | Sector       | Est.<br>NPAT (\$A) | Est.<br>DPS (\$A) | NPAT (\$A) |
|------------|------|--------------------------------|------|--------------|--------------------|-------------------|------------|
| Mon 29 Aug | FMG  | Fortescue Metals Group         | FY22 | Materials    | 6.1B US            | 1.27 US           |            |
| Mon 29 Aug | MMS  | McMillan Shakespeare Ltd       | FY22 | Industrials  | 71.4M              | -                 |            |
| Mon 29 Aug | IVC  | InvoCare Ltd                   | HY21 | Cons. Disc   | 29.8M              | 0.13              |            |
| Mon 29 Aug | OZL  | OZ Minerals Ltd                | HY22 | Materials    | 155.5M             | 0.08              |            |
| Mon 29 Aug | MHJ  | Michael Hill International Ltd | FY22 | Cons. Disc   | 41.9M              | -                 |            |
| Tue 30 Aug | A2M  | The a2 Milk Company            | FY22 | Cons. Staple | 112M NZ            | -                 |            |
| Tue 30 Aug | HLS  | Healius Ltd                    | FY22 | Health Care  | 298.5M             | 0.068             |            |
| Tue 30 Aug | IGO  | IGO Ltd                        | FY22 | Materials    | 1.4B               | 0.19              |            |
| Tue 30 Aug | WDS  | Woodside Energy Group          | HY22 | Energy       | 489M US            | 1.347 US          |            |
| Tue 30 Aug | LNK  | Link Administration Holdings   | FY22 | Info Tech    | -42.9M             | 0.05              |            |
| Wed 31 Aug | ALX  | Atlas Arteria                  | HY22 | HY22         | -90.5M             | 0.205             |            |

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