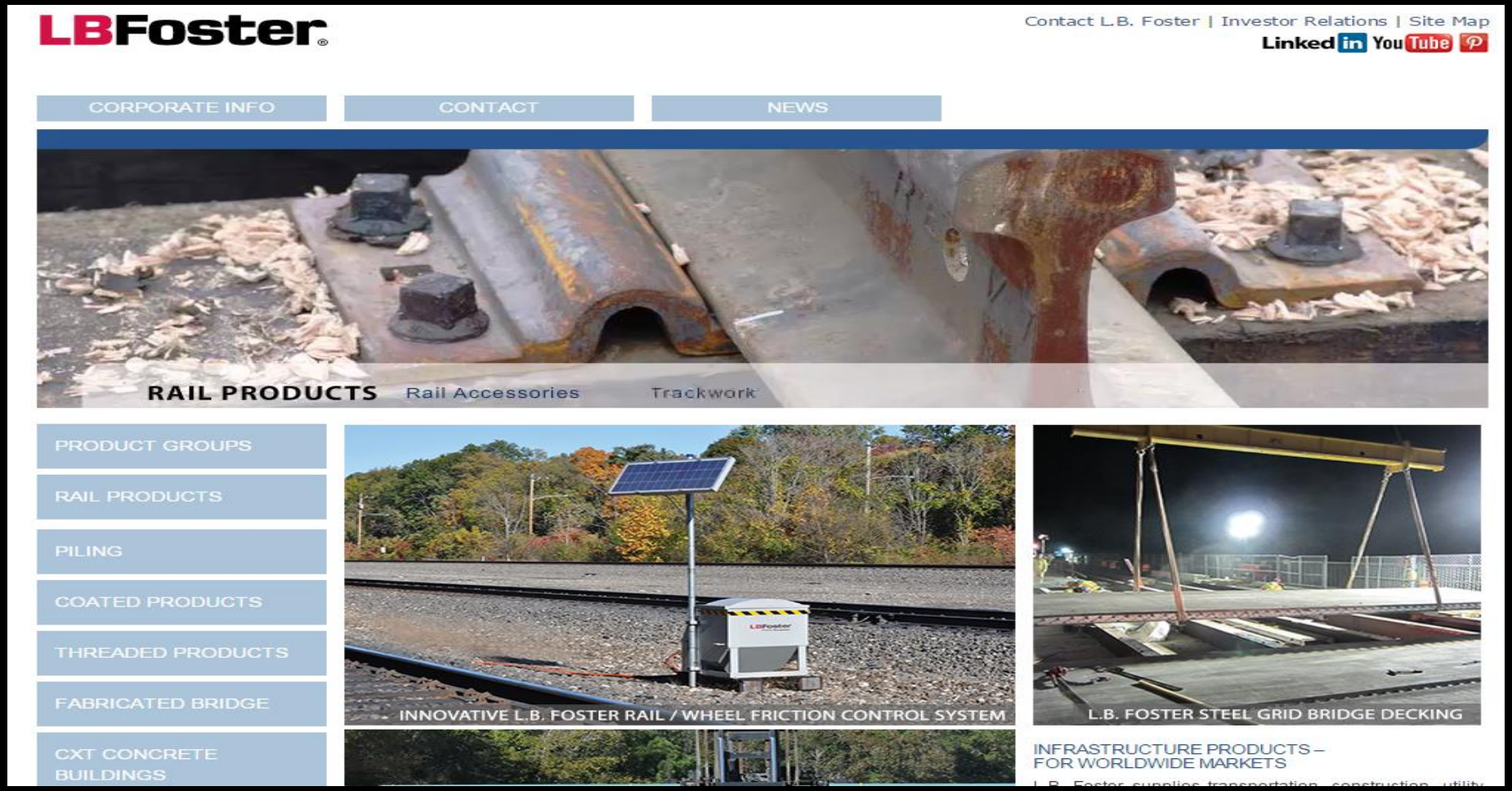
L.B. Foster Co (NASDAQ:**FSTR**)

Manufacturer of products for rail, transportation, construction, energy, etc.



18.16 0.00 (0.00%)

Mar 31 - Close

NASDAQ real-time data - Disclaimer

Currency in USD

Range	-	Div/yield	0.04/0.88
52 week	8.80 - 47.97	EPS	-4.34
Open	-	Shares	10.23M
Vol / Avg.	0.00/93,441.00	Beta	1.90
Mkt cap	195.62M	Inst. own	69%
P/E	-		

G+1 0

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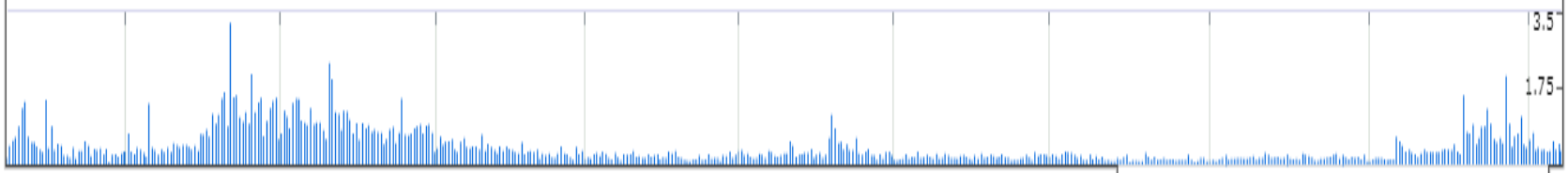
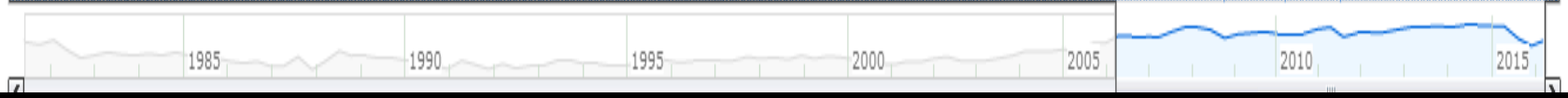
Zoom: 1d 5d 1m 3m 6m YTD 1y 5y 10y All

Apr 07, 2006 - Mar 31, 2016 -1.27 (-6.54%)

Volume (mil / 1wk)





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RS
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WAB
more »
Zoom: 1d 5d 1m 3m 6m YTD 1y 5y 10y All
Apr 01, 2015 - Mar 31, 2016 -28.2 (-60.83%)
50
40
30
20
10
4¢
4¢
4¢
4¢
Apr 2015
May 2015
Jun 2015
Jul 2015
Aug 2015
Sep 2015
Oct 2015
Nov 2015
Dec 2015
Jan 2016
Feb 2016
Mar 2016
Volume (mil / 1d)
0.7
0.35
1985
1990
1995
2000
2005
2010
2015
Settings | Technicals | Link to this view
Volume delayed by 15 mins
Prices are not from all markets

Stocks with Free Catalyst

L.B. Foster Co (NASDAQ:**FSTR**)

Manufacturer of products for rail

Three segments:

	Percentage of Net Sales		
	2015	2014	2013
Rail Products and Services	53%	62%	61%
Construction Products	28	29	32
Tubular and Energy Services	19	9	7
	100%	100%	100%

MCAP: $195m

EV: $335m

DEBT: $167m

Share price: $18.16

shares: ~10m

Dividend: **0.9%**

Fair Value: **$25-30** $300m

-Vice president > fired

-Share buyback worth max> $30m

-Some Insider purchases (but not significant)

- CEO paid ~ $1.6m
- Restructuring
- Consolidation of facilities and closures in markets that did not have sustainable demand
- Headcount reductions have totaled close to 600 in the last 15 months
- EBITDA is expected to be between $48 million to $52 million; EPS in the range of **$1** to $1.40

					$	Total # shares
19/11/2015	KASEL JOHN F	officer (Sr. Vice President)	3,500	$11.61	40,638	5,838
12/11/2015	KASEL JOHN F	officer (Sr. Vice President)	1,500	$11.46	17,195	21,700
19/11/2015	FOSTER LEE B II	director	5,000	$11.57	57,850	22,000
19/11/2015	KASEL JOHN F	officer (Sr. Vice President)	3,500	$11.61	40,638	4,838
12/11/2015	Bauer Robert P	CEO	2,000	$11.42	22,840	4,000
11/11/2015	Bauer Robert P	CEO	3,000	$11.90	35,700	68,794
12/11/2015	Bauer Robert P	CEO	2,000	$11.42	22,840	70,794
11/11/2015	Bauer Robert P	CEO	3,000	$11.90	35,700	68,794
12/11/2015	KASEL JOHN F	officer (Sr. Vice President)	1,500	$11.46	17,195	21,700
12/11/2015	RUSSO DAVID J	CFO	3,000	$11.50	34,500	34,224
11/11/2015	MCKANE G THOMAS	director	1,000	$11.48	11,480	22,501
14/08/2015	Bauer Robert P	CEO	1,000	$19.72	19,720	65,794
14/08/2015	Bauer Robert P	CEO	1,000	$19.50	19,497	64,794
10/08/2015	FOSTER LEE B II	director	5,000	$19.83	99,150	17,000
06/08/2015	Bauer Robert P	CEO	1,000	$20.40	20,400	63,794
06/08/2015	Purgason Robert S	director	7,500	$20.16	151,180	10,136
02/06/2015	Bauer Robert P	CEO	1,000	$38.29	38,295	2,000
					684,816	

Incentive compensation:

- EBITDA ~ **$40m**
-ROIC > **10.6%**
-Total Share Holder Return (TSR)

Good honest, real incentives.

	AVERAGE (5 years)	2015-12	2014-12	2013-12	2012-12	2011-12	2010-12	2009-12	2008-12	2007-12	2006-12
Revenue USD Mil	602	625	607	598	589	591	475	382	513	509	390
Operating Income USD Mil		29	37	42	23	32	32	25	39	39	18
Net Income USD Mil		-44	26	29	16	23	20	16	28	111	14
Dividends USD		0.16	0.13	0.12	0.1	0.1					
Shares Mil		10	10	10	10	10	10	10	11	11	11
EPS	**2.2**	-4.33	2.48	2.85	1.58	2.22	1.98	1.53	2.57	10.0	1.25
Operating Cash Flow USD Mil		56	67	14	26	31	59	26	24	-5	-14
Cap Spending USD Mil		-15	-17	-10	-7	-12	-6	-6	-5	-5	-17
Free Cash Flow USD Mil	26.6	41	50	4	19	19	53	20	19	-10	-31
Net Margin % average 10 years	6.1	-7.12	4.23	4.9	2.75	3.87	4.31	4.12	5.41	21.75	3.47
Return on Equity % average 5 yrs	8.1	-14.37	7.87	9.7	5.81	8.71	8.39	6.99	12.86	70.99	15.2

	2015	2014
ASSETS		
rrent assets:		
Cash and cash equivalents	$ 33,312	$ 52,024
Accounts receivable — net	78,487	90,178
Inventories — net	96,396	95,089
Prepaid income tax	1,131	2,790
Other current assets	5,148	4,101
Total current assets	214,474	244,182
Property, plant, and equipment — net	126,745	74,802
her assets:		
Goodwill	81,752	82,949
Other intangibles — net	134,927	82,134
Deferred tax assets	226	93
Investments	5,321	5,824
Other assets	3,215	1,733
Total assets	$566,660	$491,717
LIABILITIES AND STOCKHOLDERS' EQUITY		
rrent liabilities:		
Accounts payable	$ 55,804	$ 67,166
Deferred revenue	6,934	8,034
Accrued payroll and employee benefits	10,255	13,419
Accrued warranty	8,755	11,500
Current maturities of long-term debt	1,335	676
Other accrued liabilities	8,563	7,899
Total current liabilities	91,646	108,694
Long-term debt	167,419	25,752
Deferred tax liabilities	8,926	7,618
Other long-term liabilities	15,837	13,765
ockholders' equity:		
Common stock, par value $.01, authorized 20,000,000 shares; shares issued at December 31, 2015 and December 31, 2014, 11,115,779; shares outstanding at December 31, 2015 and December 31, 2014, 10,221,006 and 10,242,405, respectively	111	111
Paid-in capital	46,681	48,115
Retained earnings	276,571	322,672
Treasury stock — at cost, common stock, shares at December 31, 2015 and December 31, 2014, 894,773 and 873,374, respectively	(22,591)	(23,118)
Accumulated other comprehensive loss	(17,940)	(11,892)
Total stockholders' equity	282,832	335,888
TAL LIABILITIES AND STOCKHOLDERS' EQUITY	$566,660	$491,717

	FSTR	Industry Avg	S&P 500	FSTR 5Y Avg*
Price/Earnings	–	14.1	17.7	18.1
Price/Book	0.7	2.8	2.5	1.3
Price/Sales	0.3	2.4	1.7	0.7
Price/Cash Flow	3.3	8.4	11.0	24.3
Dividend Yield %	0.9	2.1	2.5	0.5