

STADIUM GROUP PLC PRELIMINARY RESULTS 2010



1911 CENTENARY 2011







2010 OVERVIEW

Preliminary Results 2010

- Healthy recovery in revenues and profits
- Divestment of non-core plastics business completed
- Focus on high growth electronics market
- Financial resources available to deliver future growth
- Management restructuring to reflect new focus of the business

FINANCIAL HIGHLIGHTS

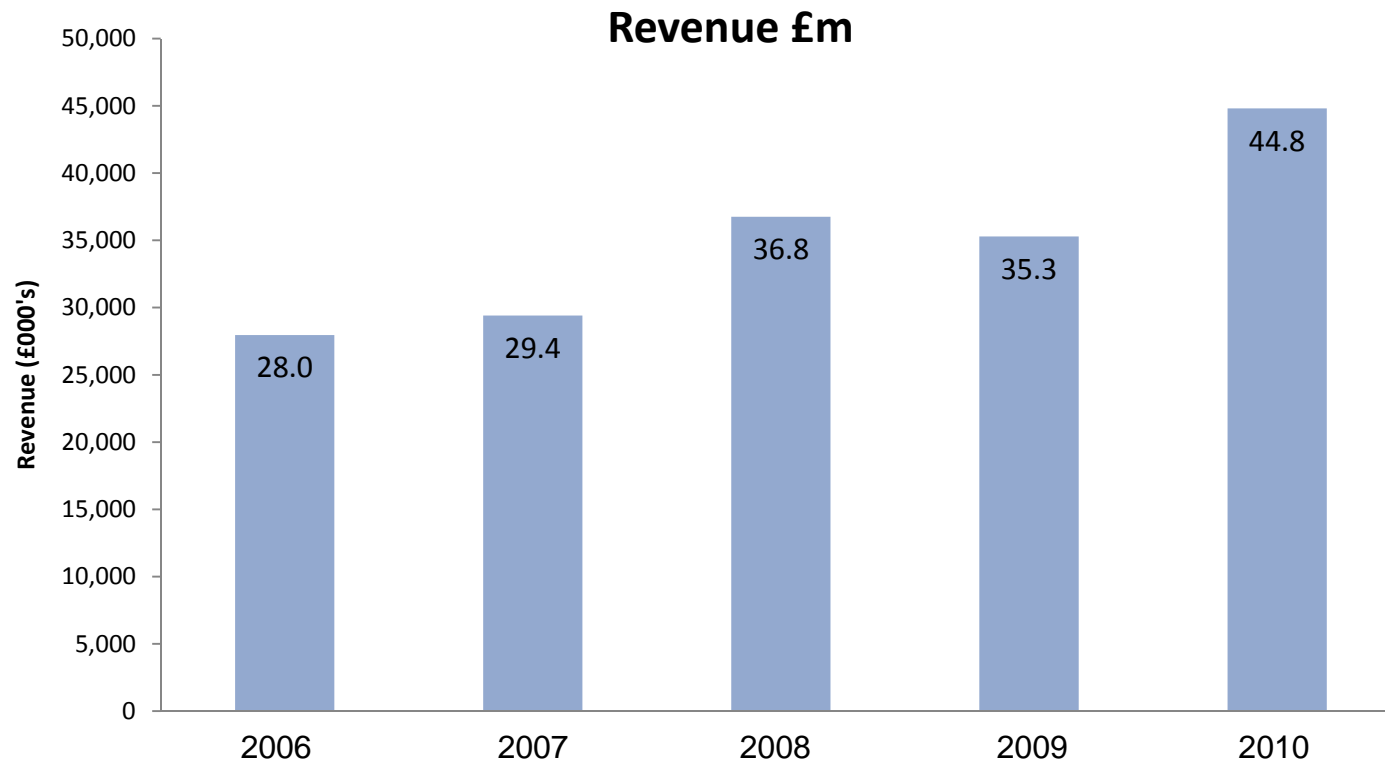
Preliminary Results 2010

- Revenues  27% to £44.81m (2009: £35.30m)
- PBT  95% to £2.87m (2009: £1.47m)
- Net cash £1.67m (2009: £0.40m)
- Underlying EPS  60% to 6.7p (2009: 4.2 p)
- Dividend  11% to 2.50p (2009: 2.25p)

Continuing activities

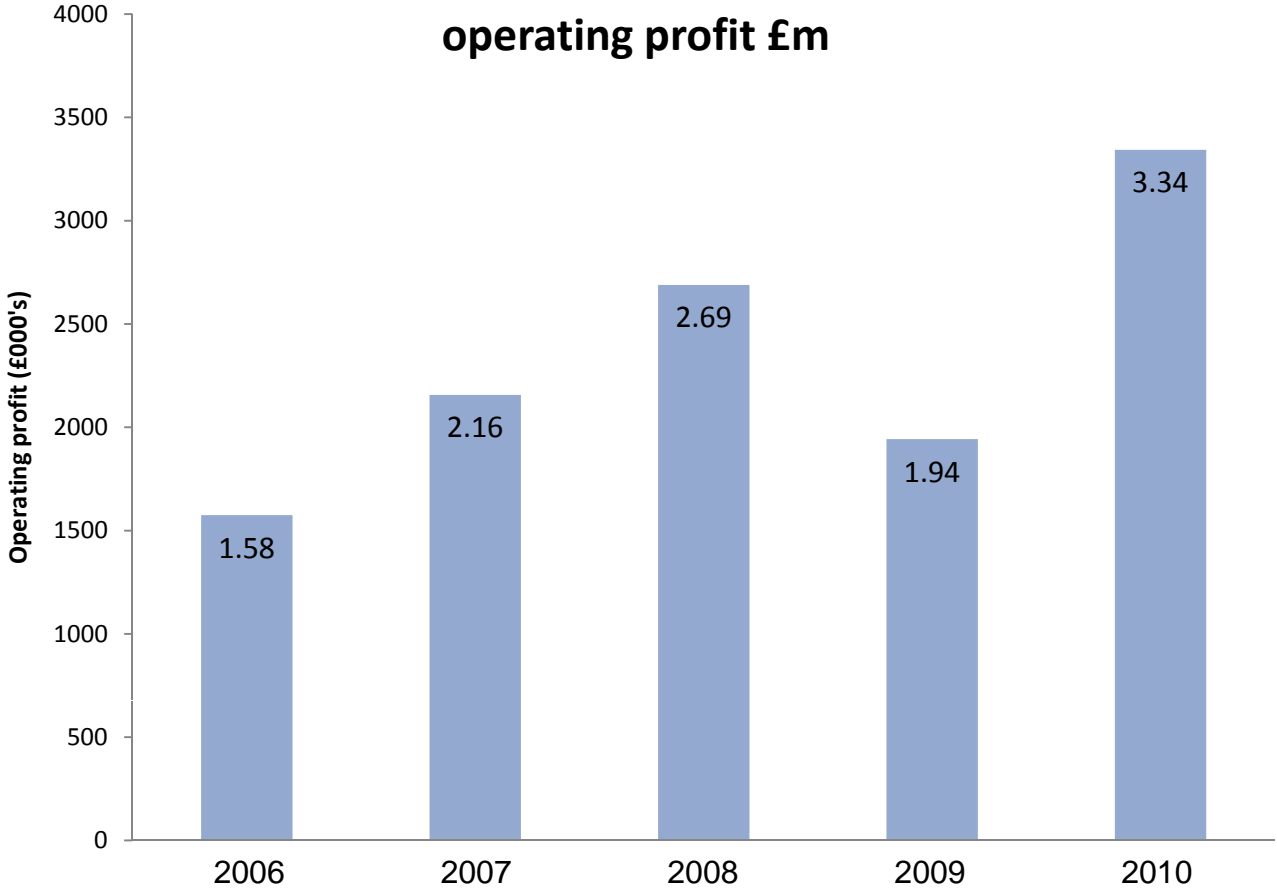
5 YEAR RECORD

Preliminary Results 2010



5 YEAR RECORD

Preliminary Results 2010



INCOME STATEMENT

Preliminary Results 2010

CONTINUING OPERATIONS For the year ending 31 December	2010 £000'S	2009 £000'S
Revenue	44,811	35,295
Cost of sales	(35,585)	(27,991)
Gross profit	9,226	7,304
Operating expenses	(5,883)	(5,361)
Operating profit	3,343	1,943
Finance costs	(470)	(473)
Profit before tax	2,873	1,470
Taxation	(924)	(256)
Profit from continuing operations	1,949	1,214
Profit from discontinued operations	20	589
Profit attributable to equity holders of the parent	1,969	1,803
Continuing operations		
Basic earnings per share (p)	6.7	4.2
Diluted earnings per share (p)	6.7	4.2
Continuing and discontinued operations		
Basic earnings per share (p)	6.8	6.3
Diluted earnings per share (p)	6.8	6.3

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STATEMENT OF FINANCIAL POSITION

Preliminary Results 2010

	31 Dec 2010 £000'S	31 Dec 2009 £000'S
Tangible assets	3,987	6,951
Intangible assets	2,707	2,741
Other receivables	441	-
	7,135	9,692
Inventory	6,176	5,737
Receivables	8,369	9,466
Payables	(9,936)	(10,344)
Working capital	4,609	4,859
Non-current assets held for sale	2,041	-
Bank - cash	4,061	3,468
Bank - loans	(2,394)	(3,066)
	1,667	402
Net pension liability	(5,641)	(6,046)
Other	(30)	(23)
Net assets	9,781	8,884
Gearing	Nil	Nil

SUMMARISED CASH FLOW

Preliminary Results 2010

	31 Dec 2010 £000's	31 Dec 2009 £000's
Operating profit – continuing operations	3,343	1,943
Operating profit – discontinued operations	247	818
Depreciation – continuing operations	661	753
Depreciation – discontinued operations	99	200
Working capital	(1,694)	1,113
Trading cashflow	2,656	4,827
Pensions	(1,815)	(745)
Tax	(526)	(766)
Operating cashflow	315	3,316
Fixed assets	(334)	(471)
Proceeds from divestment	2,001	-
Interest/loans	(820)	(510)
Equity share capital subscribed	130	-
Dividends	(699)	(605)
Increase in cash	593	1,730

- **Manufacturing Partnerships**

- Service, quality and trust

- **Engineering Solutions**

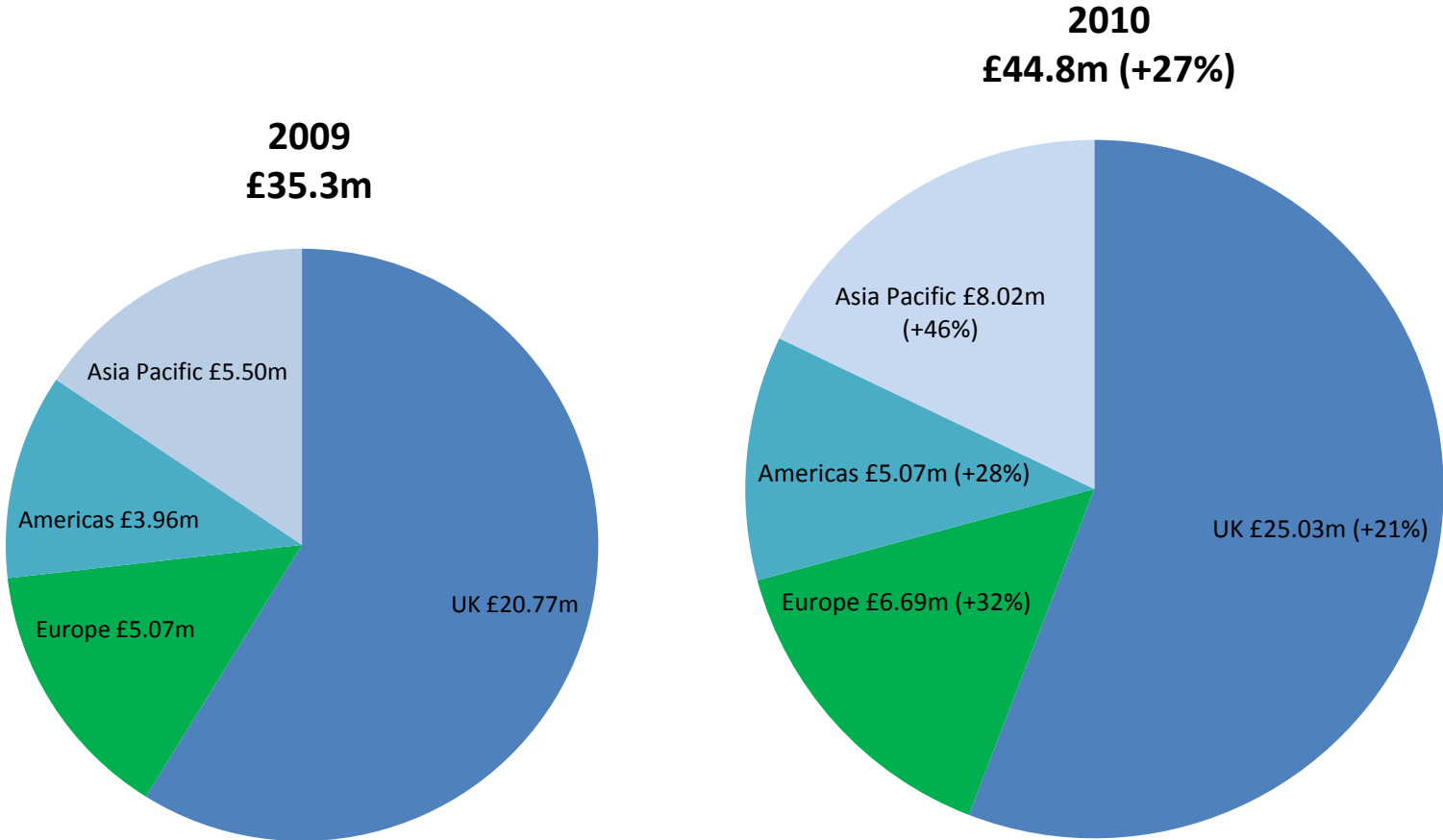
- Value added design support

- **Sourcing Opportunities**

- Vertical integration, supply chain and low cost options

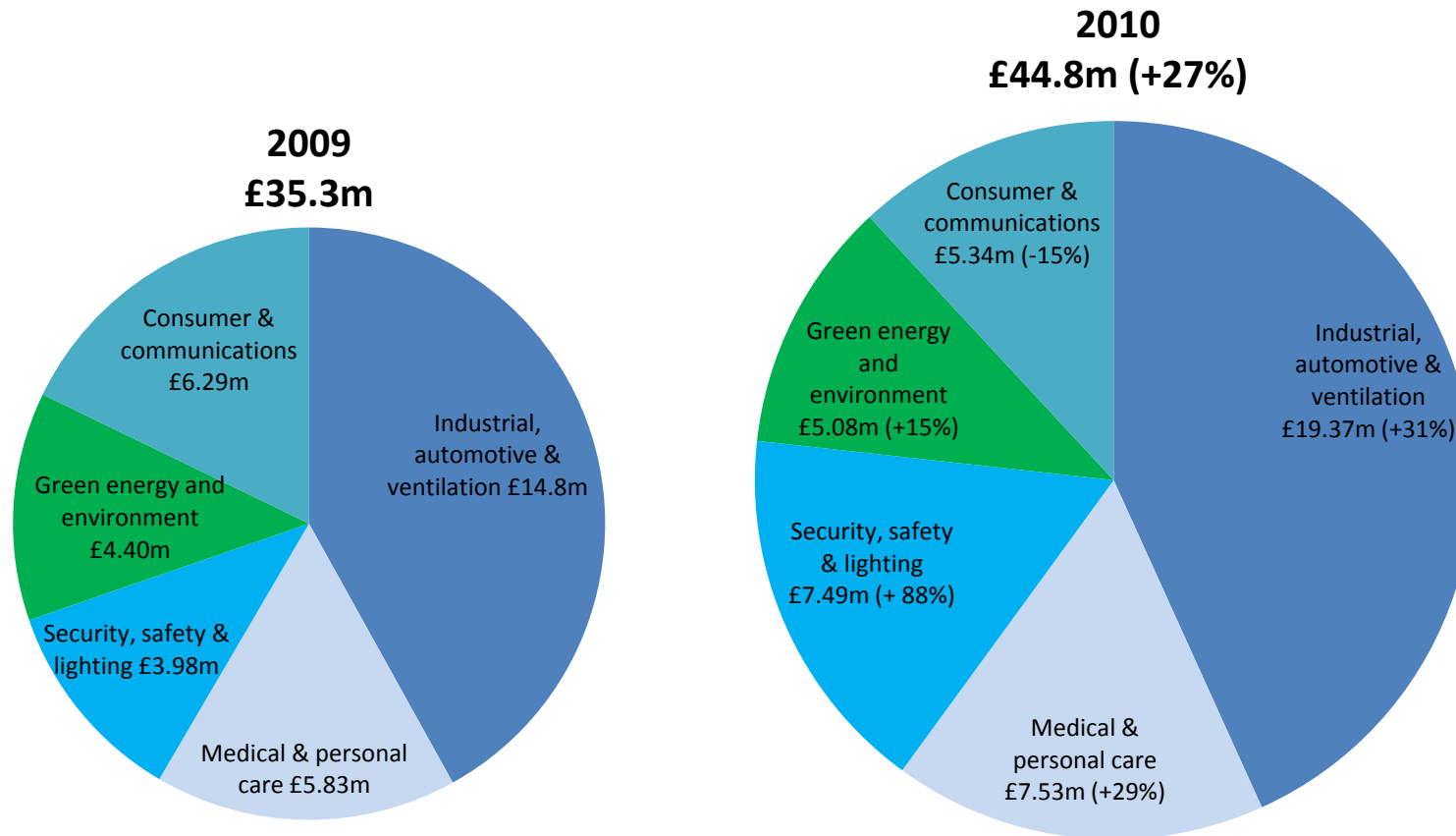
REVENUE BY DESTINATION

Preliminary Results 2010



REVENUE BY MARKET SECTOR

Preliminary Results 2010



TARGET GROWTH MARKETS

Preliminary Results 2010

- Geographical – over 50% non-UK
- Industry sectors
 - Metering
 - Greentech
 - Security
 - Low energy lighting
 - Transport
 - Medical
- Key new business wins 2010
- Sales pipeline for 2011



SUMMARY & OUTLOOK

Preliminary Results 2010

- Healthy recovery in revenues and profits
- Divestment of non-core plastics business completed
- Management restructuring to reflect new focus of the business
- UK domestic market patchy for 2011
- Resources available for future growth

Appendix

Nick Brayshaw, Chairman

Nick was appointed as Non-Executive Director in April 2005 and Chairman in April 2006.

He began his career with Rio Tinto plc and Caradon plc, before being appointed Group Chief Executive of Wagon plc until March 2004. He was an independent member of the Business and Innovation Group Board of the Department of Trade and Industry from 2000 to 2006, and Chairman of the CBI Manufacturing Council from 2003 to 2007.

He is currently Chairman of UK Manufacturing, Barclays Bank plc and Chairman of global manufacturing business Worldmark International Limited, which was recently named as one of Britain's top private equity-backed companies with the fastest growth over the last two years

Colin Wilson, Finance Director

Colin is a Chartered Accountant who joined Stadium in April 2006 as Finance Manager. He was appointed Company Secretary in December 2006 and was as Finance Director in February 2008.

Colin trained with Coopers & Lybrand prior to moving into industry. Colin joined ICI's Uniqema business, where he spent over 10 years in diverse roles covering production accounting, systems implementations, planning and performance management and business analysis.

STADIUM ELECTRONICS

- Leading UK-owned provider of electronic design and build solutions
- Flexible Solutions – best fit manufacturing
 - Design and low volume production from UK manufacturing facilities
 - Cost effective high-volume solutions from Asia manufacturing facilities
- Long-term partnership approach
- Supply chain support
- 100 years in business
- 1,100 employees in Hartlepool, Rugby and Dongguan, PRC

STADIUM POWER

- Power supply solutions to OEMs
- Flexible and competitive – employs manufacturing capabilities of Stadium Electronics

APPENDIX – SEGMENTAL ANALYSIS

	31 Dec 2010 £000's	31 Dec 2009 £000's
Revenue	44,811	35,295
Electronics	40,474	32,165
Power	4,337	3,130
Operating profit	3,343	1,943
Electronics	2,525	1,669
Power	818	274

CONTACT STADIUM GROUP PLC

Preliminary Results 2010

Stadium Group plc
Stephen House
Brenda Road
Hartlepool
Cleveland
TS25 2BQ

T: 01429 852 506

www.stadium-electronics.com

www.stadium-plc.com

Nick Brayshaw, Chairman

Colin Wilson, Finance Director

nick.brayshaw@stadium.co.uk

colin.wilson@stadium.co.uk