

## MIRA INFORM REPORT

<b>Report No. :</b>	538715
<b>Report Date :</b>	10.11.2018

### IDENTIFICATION DETAILS

<b>Name :</b>	OVERDIE METALS B.V.
<b>Registered Office :</b>	Kitmanstraat 231, 1812PL Alkmaar
<b>Country :</b>	Netherlands
<b>Financials (as on) :</b>	31.12.2017
<b>Date of Incorporation :</b>	01.02.2004
<b>Com. Reg. No.:</b>	37110466
<b>Legal Form :</b>	Private Limited Company
<b>Line of Business :</b>	<ul style="list-style-type: none"> <li>• Recovery of sorted materials</li> <li>• Wholesale of iron and steel scrap and used nonferrous metals</li> </ul>
<b>No. of Employees :</b>	17 [2018]

### RATING & COMMENTS

(Mira Inform has adopted New Rating mechanism w.e.f. 23<sup>rd</sup> January 2017)

**MIRA's Rating :** A+

Credit Rating	Explanation	Rating Comments
A+	Low Risk	Business dealings permissible with low risk of default

<b>Status :</b>	Good
<b>Payment Behaviour :</b>	Regular
<b>Litigation :</b>	Clear

#### NOTES :

Any query related to this report can be made on e-mail : [infodept@mirainform.com](mailto:infodept@mirainform.com) while quoting report number, name and date.

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**ECGC Country Risk Classification List**

Country Name	Previous Rating (30.06.2018)	Current Rating (30.09.2018)
Netherlands	A1	A1

Risk Category	ECGC Classification
Insignificant	A1
Low Risk	A2
Moderately Low Risk	B1
Moderate Risk	B2
Moderately High Risk	C1
High Risk	C2
Very High Risk	D

**NETHERLANDS - ECONOMIC OVERVIEW**

The Netherlands, the sixth-largest economy in the European Union, plays an important role as a European transportation hub, with a consistently high trade surplus, stable industrial relations, and low unemployment. Industry focuses on food processing, chemicals, petroleum refining, and electrical machinery. A highly mechanized agricultural sector employs only 2% of the labor force but provides large surpluses for food-processing and underpins the country's status as the world's second largest agricultural exporter.

The Netherlands is part of the euro zone, and as such, its monetary policy is controlled by the European Central Bank. The Dutch financial sector is highly concentrated, with four commercial banks possessing over 80% of banking assets, and is four times the size of Dutch GDP.

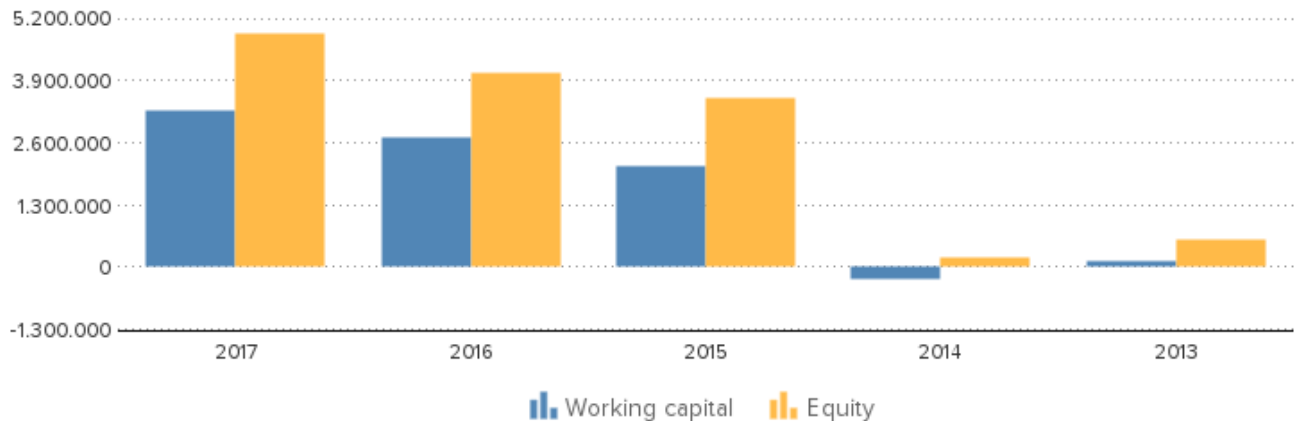
In 2008, during the financial crisis, the government budget deficit hit 5.3% of GDP. Following a protracted recession from 2009 to 2013, during which unemployment doubled to 7.4% and household consumption contracted for four consecutive years, economic growth began inching forward in 2014. Since 2010, Prime Minister Mark RUTTE's government has implemented significant austerity measures to improve public finances and has instituted broad structural reforms in key policy areas, including the labor market, the housing sector, the energy market, and the pension system. In 2017, the government budget returned to a surplus of 0.7% of GDP, with economic growth of 3.2%, and GDP per capita finally surpassed pre-crisis levels. The fiscal policy announced by the new government in the 2018-2021 coalition plans for increases in government consumption and public investment, fueling domestic demand and household consumption and investment. The new government's policy also plans to increase demand for workers in the public and private sector, forecasting a further decline in the unemployment rate, which hit 4.8% in 2017.

Source : CIA

## SUMMARY

<b>Company name</b>	<b>Overdie Metals B.V.</b>
<b>Operative address</b>	Kitmanstraat 231 1812PL Alkmaar Netherlands
<b>Status</b>	Active
<b>Legal form</b>	Private Limited Company
<b>Registration number</b>	KvK-nummer: 37110466
<b>VAT-number</b>	812720374
<b>European VAT-number</b>	NL812720374B01

Year	2017	Mutation	2016	Mutation	2015
Fixed assets	2.209.461	38,26	1.598.011	7,56	1.485.708
Total receivables	5.024.668	23,90	4.055.585	97,07	2.057.902
Total equity	4.877.896	20,26	4.056.268	15,26	3.519.138
Short term liabilities	9.148.508	35,76	6.738.542	73,87	3.875.562
Net result	821.628	52,97	537.130	254,54	-347.568
Working capital	3.287.922	22,00	2.695.066	27,78	2.109.065
Quick ratio	0,57	-9,52	0,63	12,50	0,56



## CONTACT INFORMATION

<b>Company name</b>	Overdie Metals B.V.
<b>Trade names</b>	Overdie Metals B.V. Overdie Ferro
<b>Operative address</b>	Kitmanstraat 231 1812PL Alkmaar Netherlands

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Correspondence address	Kitmanstraat 231 1812PL Alkmaar Netherlands
Telephone number	0725409309
Fax number	0725402161
Email address	mail@overdie.nl
Website	www.overdiemetals.nl

## **REGISTRATION**

Registration number	KvK-nummer: 37110466
Branch number	000019778651
VAT-number	812720374
European VAT-number	NL812720374B01
Status	Active
First registration company register	2004-03-02
Memorandum	2004-02-17
Establishment date	2004-02-01
Legal form	Private Limited Company
Legal person since	2004-02-17
Issued placed capital	EUR 18.000
Paid up share capital	EUR 18.000

## **ACTIVITIES**

SBI	3832: Recovery of sorted materials 46772: Wholesale of iron and steel scrap and used nonferrous metals
Exporter	Yes
Importer	Yes
Goal	Groothandel in, verwerking, im- en export en transport van oude ferro en non-ferro metalen, alsmede groothandel in en verwerken van schroot

## **RELATIONS**

Shareholders	<b>IJzerwerf Overdie Beheer B.V.</b> Kitmanstraat 231 1812PL Alkmaar Netherlands Registration number: <u>37059798</u> Percentage: 100%
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**Affiliates**

**Overdie Staal B.V.**  
Noordervaart 236  
1841JH Stompetoren  
Netherlands  
Registration number: 37059797

**Branches (number)**  
**Branches**

1  
**Overdie Metals B.V.**  
Uiterdijk 10  
1505GW ZAANDAM  
Netherlands

**Companies on same address**

Registration number: 37110466  
**Dick de Jong Beheer B.V.**  
Registration number: 37079138

**Gebroeders De Jong Beheer B.V.**  
Registration number: 37079136

**IJzerwerf Overdie Beheer B.V.**  
Registration number: 37059798

**Cejadi Holding B.V.**  
Registration number: 37158282

**Overdie Fines B.V.**  
Registration number: 37159668

**Stichting Cejadi Holding**  
Registration number: 37161884

**Overdie Metal Separation Holding B.V.**  
Registration number: 69641935

## **REAL ESTATE**

**Details operative address**

Surface area: 1212 m2  
Purpose: Office function  
Construction year: 2012  
Status: Building in use  
Under investigation: No

## **MANAGEMENT**

**Active management**

**IJzerwerf Overdie Beheer B.V.**  
Kitmanstraat 231

1812PL Alkmaar  
Netherlands  
Registration number: 37059798  
Competence: Fully authorized  
Function: General Director  
Starting date: 2004-02-17

**N.O. Wismeijer Nils Olaf**  
Competence: Fully authorized  
Function: Financieel Manager  
Starting date: 2012-12-14  
Date of birth: 1963-04-11, Amsterdam, NL  
Involved with the following companies:

**Overdie Fines B.V.**  
Kitmanstraat 231  
1812PL Alkmaar  
Netherlands  
Registration number: 37159668  
Function: Manager  
Starting date: 2014-03-31

**Overdie Ferro B.V.**  
Kitmanstraat 231  
1812PL Alkmaar  
Netherlands  
Registration number: 37059796  
Status: Dissolved  
Function: Financieel Manager  
Starting date: 2012-12-14

**Overdie Staal B.V.**  
Noordervaart 236  
1841JH Stompetoren  
Netherlands  
Registration number: 37059797  
Function: Financieel Manager  
Starting date: 2012-12-14

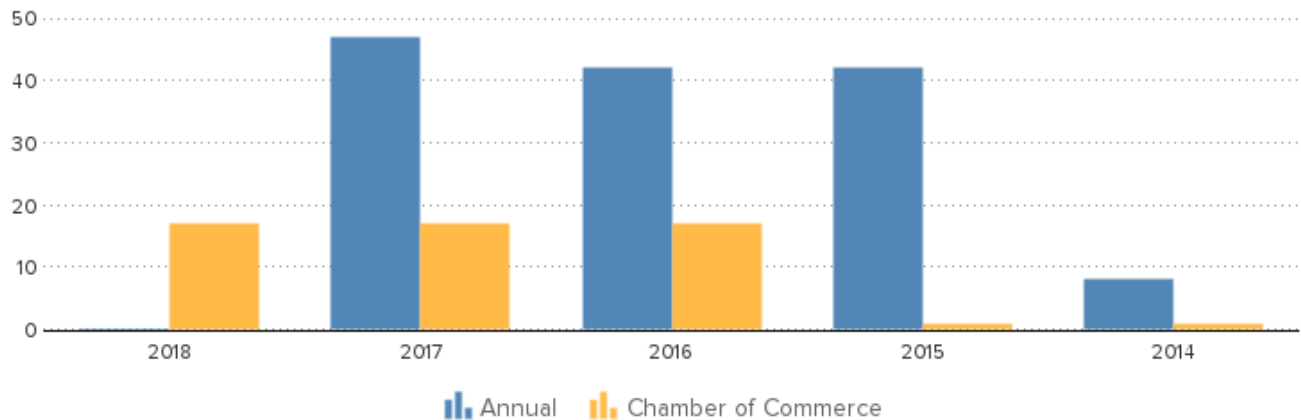
**A.M. Duinmeijer Arjen Matthijs**  
Competence: Limited authorization  
Function: Proxy  
Starting date: 2016-03-10  
Date of birth: 1972-09-09, Alkmaar, NL  
Involved with the following companies:

**Overdie Ferro B.V.**  
Kitmanstraat 231  
1812PL Alkmaar  
Netherlands  
Registration number: 37059796

Status: Dissolved  
 Function: Proxy  
 Starting date: 2014-03-10

## EMPLOYEES

Year	2018	2017	2016	2015	2014
Annual		47	42	42	8
Chamber of Commerce	17	17	17	1	1



## PAYMENTS

Description		Regular					
Total		EUR 164.843					
Quarter	Volume	Not overdue	1-30	31-60	61-90	91-120	121+
2018 Q4	A	55,00%	45,00%	0,00%	0,00%	0,00%	0,00%
2018 Q3	A	55,00%	45,00%	0,00%	0,00%	0,00%	0,00%
2018 Q2	C	44,00%	56,00%	0,00%	0,00%	0,00%	0,00%
2018 Q1	D	23,00%	67,00%	9,00%	0,00%	0,00%	0,00%
2017 Q4	C	100,00%	0,00%	0,00%	0,00%	0,00%	0,00%

A = < 10.000, B = < 25.000, C = < 50.000, D = < 125.000, E = > 125.000

Payments within industry		Last quarter			Last year		
Average payment period (days)		28			33		
Average delay (days)		12			15		
Quarter	Not overdue	1-30	31-60	61-90	91-120	121+	
2018 Q4	44,00%	55,00%	1,00%	1,00%	0,00%	0,00%	

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2018 Q3	45,00%	53,00%	2,00%	1,00%	0,00%	0,00%
2018 Q2	41,00%	52,00%	3,00%	1,00%	0,00%	3,00%
2018 Q1	52,00%	37,00%	6,00%	2,00%	1,00%	2,00%
2017 Q4	71,00%	22,00%	2,00%	2,00%	1,00%	2,00%

The above data is an indication of the average payment behaviour of the client. the payment experiences can be affected by disputes, payment arrangements, etc.

**KEY FIGURES**

Year	2017	2016	2015	2014	2013
Quick ratio	0,57	0,63	0,56	0,32	0,47
Current ratio	1,36	1,40	1,54	0,93	1,04
Working capital/ balance total	0,22	0,24	0,28	-0,06	0,03
Equity / balance total	0,33	0,37	0,47	0,05	0,13
Equity / Fixed assets	2,21	2,54	2,37	0,38	0,86
Equity / liabilities	0,50	0,58	0,89	0,06	0,15
Balance total / liabilities	1,50	1,58	1,89	1,06	1,15
Working capital	3.287.922	2.695.066	2.109.065	-247.840	134.735
Equity	4.877.896	4.056.268	3.519.138	212.492	560.545
Mutation equity	20,26	15,26	1.556,13	-62,09	-44,25
Mutation short term liabilities	35,76	73,87	4,46	4,61	-25,53
Return on total assets (ROA)	7,42	6,41	-6,00		-13,47
Return on equity (ROE)	22,27	17,45	-12,74		-104,23
Gross margin	9.670.673	7.106.149	5.296.198		1.509.591
Operating result	1.714.362	784.951	-336.635		-466.337
Net result after taxes	821.628	537.130	-347.568		-444.952
Cashflow	1.144.474	853.086	-28.606		-334.947
EBIT	1.714.362	784.951	-336.635		-466.337
EBITDA	2.037.208	1.100.907	-17.673		-356.332

**Summary**

The 2017 financial result structure is a positive working capital of 3.287.922 euro, which is in agreement with 22 % of the total assets of the company.

The working capital has increase with 22 % compared to previous year. The ratio with respect to the total assets of the company has however, declined.

The improvement between 2016 and 2017 has mainly been caused by a change of the current liabilities.

The current ratio of the company in 2017 was 1.36. When the current ratio is below 1.5, the company may have problems meeting its short-term obligations.

The quick ratio in 2017 of the company was 0.57. A company with a Quick Ratio of less than 1 cannot currently pay back its current liabilities.

The 2016 financial result structure is a positive working capital of

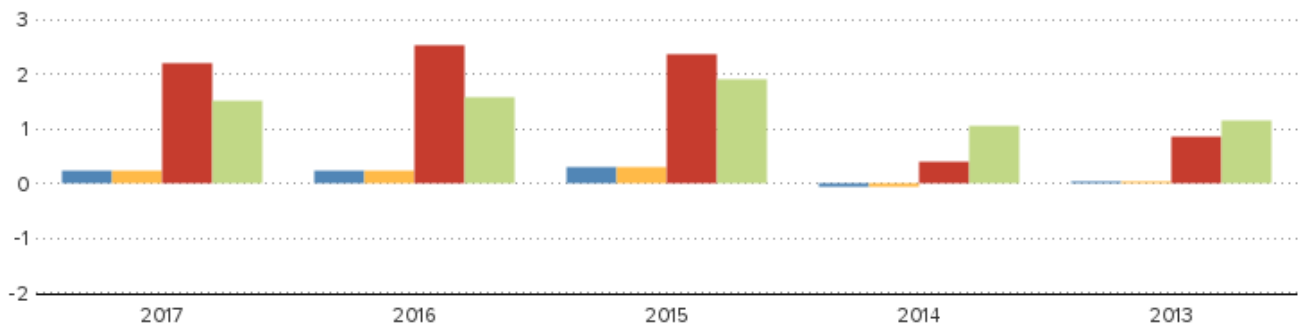
2.695.066 euro, which is in agreement with 24 % of the total assets of the company.

The working capital has increase with 27.78 % compared to previous year. The ratio with respect to the total assets of the company has however, declined.

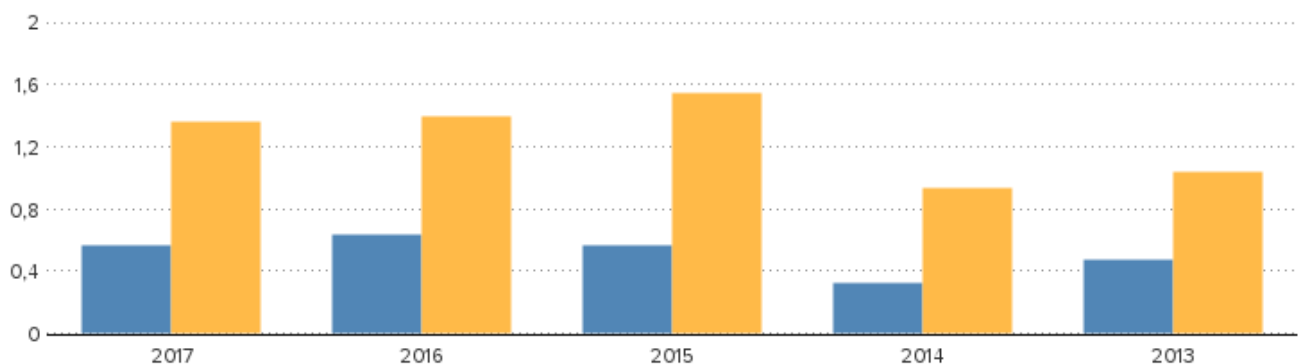
The improvement between 2015 and 2016 has mainly been caused by a change of the current liabilities.

The current ratio of the company in 2016 was 1.4. When the current ratio is below 1.5, the company may have problems meeting its short-term obligations.

The quick ratio in 2016 of the company was 0.63. A company with a Quick Ratio of less than 1 cannot currently pay back its current liabilities.



Working capital/ balance total    Equity / balance total    Equity / Fixed assets  
Balance total / liabilities



Quick ratio    Current ratio

## **FINANCIAL STATEMENT**

Last annual account

2017

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Remark annual account  
Type of annual account  
Annual account

The company is obliged to file its financial statements.  
Corporate  
**Overdie Metals B.V.**  
Kitmanstraat 231  
1812PL Alkmaar  
Netherlands  
Registration number: 37110466

## **BALANCE**

Year	2017	2016	2015	2014	2013
End date	2017-12-31	2016-12-31	2015-12-31	2014-12-31	2013-12-31
Type of annual account	Corporate	Corporate	Corporate	Corporate	Corporate
<b>Tangible fixed assets</b>	<b>2.209.461</b>	<b>1.598.011</b>	<b>1.485.708</b>	<b>556.802</b>	<b>654.488</b>
<b>Fixed assets</b>	<b>2.209.461</b>	<b>1.598.011</b>	<b>1.485.708</b>	<b>556.802</b>	<b>654.488</b>
<b>Total stock</b>	<b>7.180.686</b>	<b>5.193.797</b>	<b>3.828.893</b>	<b>2.257.456</b>	<b>2.016.515</b>
Accounts receivable					877.777
Other receivables					779.221
<b>Total receivables</b>	<b>5.024.668</b>	<b>4.055.585</b>	<b>2.057.902</b>	<b>1.197.883</b>	<b>1.656.998</b>
Liquid funds	231.076	184.226	97.832	7.040	8.026
<b>Current assets</b>	<b>12.436.430</b>	<b>9.433.608</b>	<b>5.984.627</b>	<b>3.462.379</b>	<b>3.681.539</b>
<b>Total assets</b>	<b>14.645.891</b>	<b>11.031.619</b>	<b>7.470.335</b>	<b>4.019.181</b>	<b>4.336.027</b>
<b>Issued capital</b>	<b>18.000</b>	<b>18.000</b>	<b>18.000</b>	<b>18.000</b>	<b>18.000</b>
Share premium reserve	3.055.434	3.055.434	3.055.434		
Other reserves	1.804.462	982.834	445.704	194.492	542.545
<b>Total reserves</b>	<b>4.859.896</b>	<b>4.038.268</b>	<b>3.501.138</b>	<b>194.492</b>	<b>542.545</b>
<b>Total equity</b>	<b>4.877.896</b>	<b>4.056.268</b>	<b>3.519.138</b>	<b>212.492</b>	<b>560.545</b>
Provisions				6.587	13.174
Long term interest yielding debt	619.487	236.809	75.635	89.883	215.504
<b>Long term liabilities</b>	<b>619.487</b>	<b>236.809</b>	<b>75.635</b>	<b>89.883</b>	<b>215.504</b>
Accounts payable					541.520
Other short term liabilities					3.005.284
<b>Short term liabilities</b>	<b>9.148.508</b>	<b>6.738.542</b>	<b>3.875.562</b>	<b>3.710.219</b>	<b>3.546.804</b>
<b>Total short and long term liabilities</b>	<b>9.767.995</b>	<b>6.975.351</b>	<b>3.951.197</b>	<b>3.806.689</b>	<b>3.775.482</b>
<b>Total liabilities</b>	<b>14.645.891</b>	<b>11.031.619</b>	<b>7.470.335</b>	<b>4.019.181</b>	<b>4.336.027</b>

### **Summary**

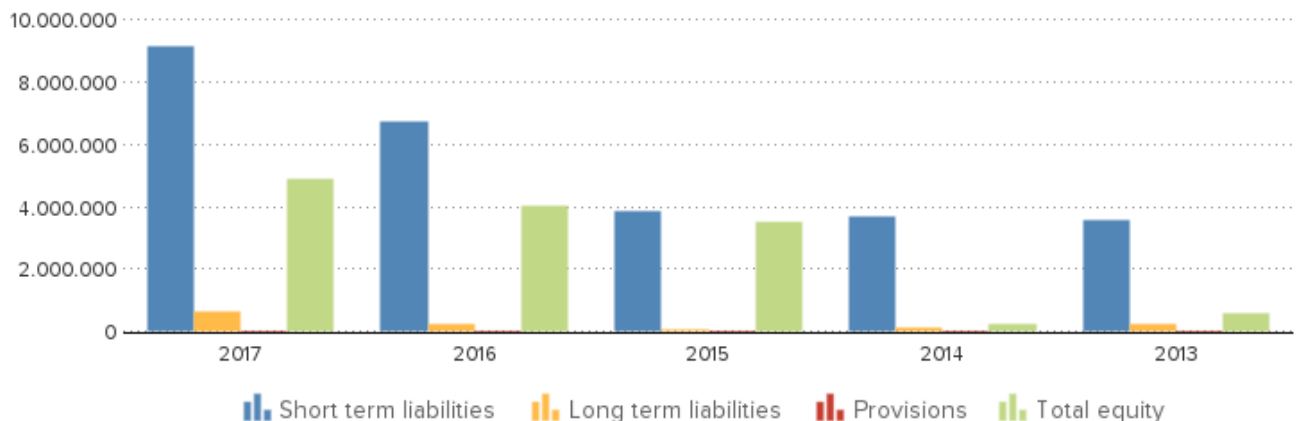
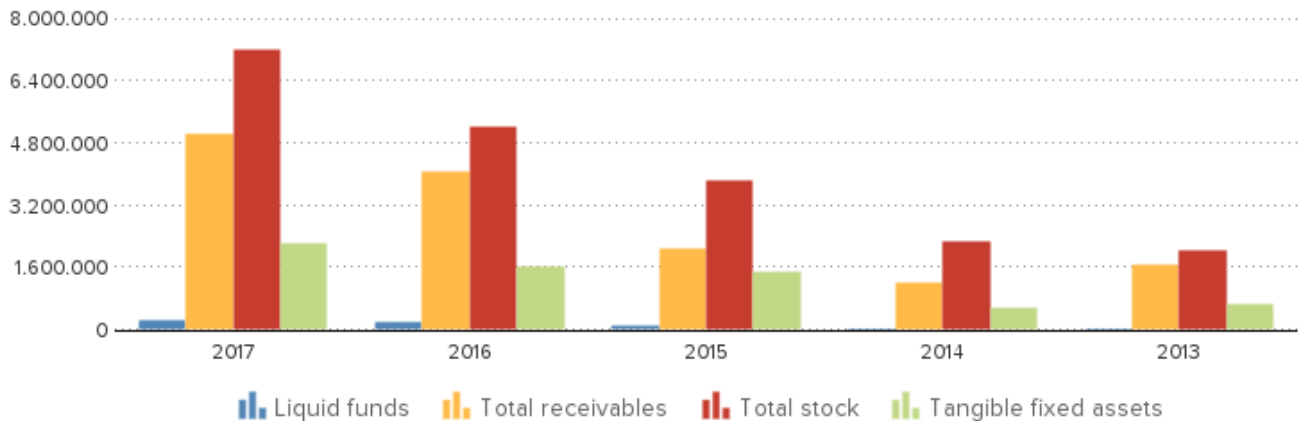
The total assets of the company increased with 32.76 % between 2016 and 2017.  
The total asset increase is retrievable in the fixed asset growth of 38.26 %.  
The asset growth has mainly been financed by a debt increase of 40.04 %. The Net Worth, however, grew with 20.26 %.  
In 2017 the assets of the company were 15.09 % composed of fixed assets and 84.91 % by current assets. The assets are being financed by an equity of 33.31 %, and total debt of 66.69 %.

The total assets of the company increased with 47.67 % between 2015 and 2016.

The fixed asset growth of 7.56 % is lower than the total asset growth.

The asset growth has mainly been financed by a debt increase of 76.54 %. The Net Worth, however, grew with 15.26 %.

In 2016 the assets of the company were 14.49 % composed of fixed assets and 85.51 % by current assets. The assets are being financed by an equity of 36.77 %, and total debt of 63.23 %.



## **PROFIT AND LOSS**

Year	2017	2016	2015	2013
Gross margin	9.670.673	7.106.149	5.296.198	1.509.591
Wages and salaries	3.381.971	2.737.049	2.459.551	1.056.730

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Amorization and depreciation	322.846	315.956	318.962	110.005
other operating costs	4.251.494	3.268.193	2.854.320	809.193
Operating expenses	7.956.311	6.321.198	5.632.833	1.975.928
<b>Operating result</b>	<b>1.714.362</b>	<b>784.951</b>	<b>-336.635</b>	<b>-466.337</b>
Financial income				12.255
Financial expenses				130.187
Financial result	-627.873	-77.298	-111.539	-117.932
<b>Result on ordinary operations before taxes</b>	<b>1.086.489</b>	<b>707.653</b>	<b>-448.174</b>	<b>-584.269</b>
Taxation on the result of ordinary activities	264.861	170.523	-100.606	-139.317
<b>Result of ordinary activities after taxes</b>	<b>821.628</b>	<b>537.130</b>	<b>-347.568</b>	<b>-444.952</b>
<b>Net result</b>	<b>821.628</b>	<b>537.130</b>	<b>-347.568</b>	<b>-444.952</b>

**Summary**

The gross profit of the company grew with 36.09 % between 2016 and 2017.

The operating result of the company grew with 118.4 % between 2016 and 2017. This evolution implies an increase of the company's economic profitability.

The result of these changes is an increase of the company's Economic Profitability of 15.76 % of the analysed period, being equal to 7.42 in the year 2017.

The Net Result of the company increased by 52.97 % between 2016 and 2017.

The company's Financial Profitability has been negatively affected by the financial activities in comparison to the EBITs behaviour. The result of these variations is a profitability reduction of 27.62 % of the analysed period, being 22.27 in the year 2017.

The company's financial structure has slowed down its financial profitability.

The gross profit of the company grew with 34.17 % between 2015 and 2016.

The operating result of the company grew with 333.18 % between 2015 and 2016. This evolution implies an increase of the company's economic profitability.

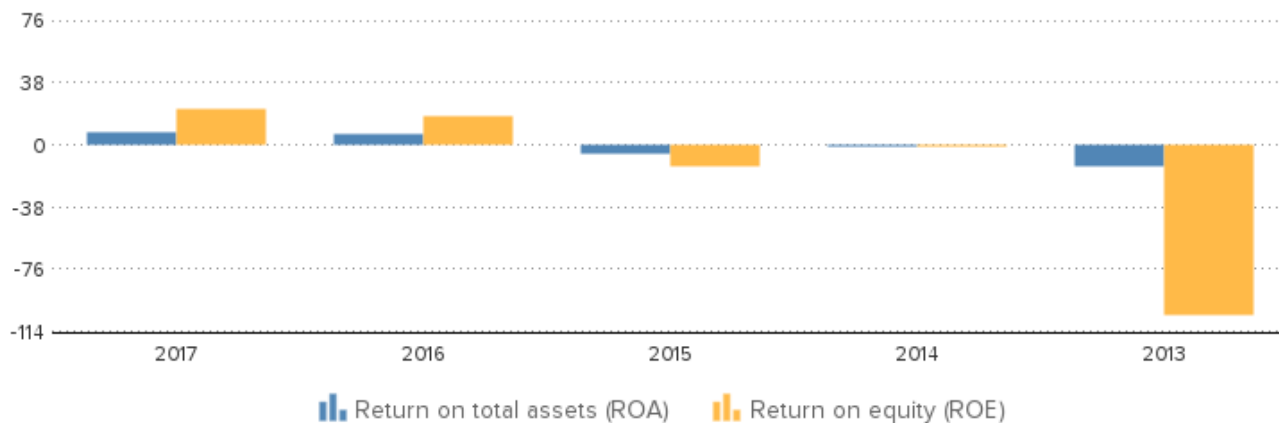
The result of these changes is an increase of the company's Economic Profitability of 206.83 % of the analysed period, being equal to 6.41 in the year 2016.

The Net Result of the company increased by 254.54 % between 2015 and 2016.

The company's Financial Profitability has been negatively affected by the financial activities in comparison to the EBITs behaviour.

The result of these variations is a profitability reduction of 236.97 % of the analysed period, being 17.45 in the year 2016.

The company's financial structure has slowed down its financial profitability.



## ANALYSIS

### Branch (SBI)

Wholesale of iron and steel scrap and used nonferrous metals (SBI code 46772)

### Region

Alkmaar en omgeving

### Summary

In the Netherlands 3023 of the companies are registered with the SBI code 46772

In the region Alkmaar en omgeving 43 of the companies are registered with the SBI code 46772

In the Netherlands 13 of the bankruptcies are published within this sector

The risk of this specific sector in the Netherlands is normal

The risk of this specific sector in the region Alkmaar en omgeving is normal

Year	2017	Company	2016	Company	2015
Equity	1.762.199	4.877.896	1.673.330	4.056.268	1.643.843
Working capital	1.193.406	3.287.922	1.201.317	2.695.066	1.004.023
Balance total	3.789.399	14.645.891	3.811.955	11.031.619	3.705.928
Quick ratio	0,95	0,57	1,02	0,63	1,04
Current ratio	1,62	1,36	1,61	1,40	1,78
Equity / balance total	0,40	0,33	0,45	0,37	0,46
Net result	171.152	821.628	311.142	537.130	103.758

## PUBLICATIONS

### Deposits

12-07-2018: De jaarrekening over 2017 is gepubliceerd.

31-07-2017: De jaarrekening over 2016 is gepubliceerd.

28-07-2016: De jaarrekening over 2015 is gepubliceerd.

19-08-2015: De jaarrekening over 2014 is gepubliceerd.

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<b>Functions</b>	15-10-2014: De jaarrekening over 2013 is gepubliceerd. 15-03-2016: Per 10-03-2016 is gevolmachtigde Arjen Mattheijs Duinmeijer in functie getreden.
<b>Mergers</b>	21-12-2015: Op 15-12-2015 fusieakte verleden. Verkrijgende rechtspersoon: Overdie Metals B.V., 37110466 Verdwijnde rechtspersonen: Overdie Ferro B.V., 37059796 Overdie Metal Recycling B.V., 37126343. 28-10-2015: Op 27-10-2015 fusievoorstel gedeponeed. Verkrijgende rechtspersoon: Overdie Metals B.V., 37110466 Verdwijnde rechtspersonen: Overdie Ferro B.V., 37059796 Overdie Metal Recycling B.V., 37126343.

## **COMPANY STRUCTURE**

<b>Relations</b>	4
<b>Company</b>	<b>Registration number</b>
<b>Gebroeders De Jong Beheer B.V. (Alkmaar)</b>	<u>37079136</u>
<b>  - - IJzerwerf Overdie Beheer B.V. (Alkmaar)</b>	<u>37059798</u>
<b>  - -   - - Overdie Metals B.V. (Alkmaar)</b>	<u>37110466</u>
<b>  - -   - - Overdie Staal B.V. (Stomporetoren)</b>	<u>37059797</u>

**FOREIGN EXCHANGE RATES**

Currency	Unit	Indian Rupees
US Dollar	1	INR 73.01
UK Pound	1	INR 95.30
Euro	1	INR 83.26
Euro	1	INR 83.34

**Note** : Above are approximate rates obtained from sources believed to be correct

**INFORMATION DETAILS**

<b>Analysis Done by :</b>	NIY
<b>Report Prepared by :</b>	SYL

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**RATING EXPLANATIONS**

Credit Rating	Explanation	Rating Comments
A++	Minimum Risk	Business dealings permissible with minimum risk of default
A+	Low Risk	Business dealings permissible with low risk of default
A	Acceptable Risk	Business dealings permissible with moderate risk of default
B	Medium Risk	Business dealings permissible on a regular monitoring basis
C	Medium High Risk	Business dealings permissible preferably on secured basis
D	High Risk	Business dealing not recommended or on secured terms only
NB	New Business	No recommendation can be done due to business in infancy stage
NT	No Trace	No recommendation can be done as the business is not traceable

NB is stated where there is insufficient information to facilitate rating. However, it is not to be considered as unfavourable.

This score serves as a reference to assess SC's credit risk and to set the amount of credit to be extended. It is calculated from a composite of weighted scores obtained from each of the major sections of this report. The assessed factors are as follows:

- Financial condition covering various ratios
- Company background and operations size
- Promoters / Management background
- Payment record
- Litigation against the subject
- Industry scenario / competitor analysis
- Supplier / Customer / Banker review (wherever available)