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<b>Dais Analytic Looks Cheap Here</b>	
<b>SCP Editor</b>	Posted: 03 June 2010 07:21 AM <span style="float: right;">[ Ignore ]</span>
<b>Administrator</b>  Total Posts: 45 Joined 2008-05-06	<p>June 3, 2010 - Dais Analytic Corporation (DLYT.OB) is a nanotech business focused on applications for energy recovery/efficiency and water treatment. The stock is currently trading at \$0.25 to \$0.30, a market cap of about \$8.8 million. It just announced that it has commenced shipments on a \$48M order, which, assuming 30% GM and current levels of op ex, would drive about \$10M or so in EBITDA alone.</p> <p>It expects to book the \$48M in the next 12 months, so we are looking at a business with a trailing 12-month revenue run rate of less than \$2M that is looking forward to a run rate over the next 12-months approaching \$40-\$50M. This kind of growth should drive a valuation of at least 4-5x EBITDA, in our opinion, which, would equate to an implied \$40M to \$50M valuation assuming our projected EBITDA on the recently announced \$48M contract. This would, in turn, translate into a stock price target of \$1.36+ assuming the same amount of shares outstanding today.</p> <p>For full disclosure - the SCP Editor, and author of this commentary, is managing partner of Aspire Clean Tech Communications, which is an advisor to Dais. If you have any questions about Dais, please call us at 760-798-4938.</p> <p>Important Disclosure:</p> <p>This information is intended to assist investors. The information does not constitute investment advice or an offer to invest or to provide management services and is subject to correction, completion and amendment without notice. Any such offer, if made, will only be made by means of a confidential prospectus or offering memorandum or management agreement. It is not our intention to state, indicate or imply in any manner that current or past results are indicative of future results or expectations. As with all investments, there are associated risks and you could lose money investing. Prior to making any investment, a prospective investor should consult with its own investment, accounting, legal and tax advisers to evaluate independently the risks, consequences and suitability of that investment</p>
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