(\$ in millions)			Year					
			1	2	3	4	5	6
Sales revenue			\$100	\$110	\$121	\$133	\$146	\$161
EBITDA			40	44	48	53	59	64
Less: D&A			(20)	(20)	(20)	(20)	(20)	(20)
EBIT			20	24	28	33	39	44
Less: Interest	expense		(12)	(12)	(12)	(12)	(12)	(12)
EBT			8	12	16	21	27	32
Less: Taxes		(3)	(5)	(7)	(8)	(11)	(13)	
EBT (Tax-effect	ted)		\$5	\$7	\$10	\$13	\$16	\$19
EBT (Tax-effecte	ed)		\$5	\$7	\$10	\$13	\$16	
Plus: D&A (no	n-cash exp	ense)	20	20	20	20	20	
Less: capital expenditures Less: Increase in net working capital			(15) (5)	(17) (5)	(18) (5)	(20) (5)	(22) (5)	
Revenue Growth				10%	10%	10%	10%	10%
EBITDA Margin			40%	40%	40%	40%	40%	40%
Tax rate			40%	40%	40%	40%	40%	40%
Capex			15%	15%	15%	15%	15%	15%
Entry Assumpti	ons		FTM EBITDA (Year 6)			64		
Entry multiple 5.0x			Exit Multiple			5.0x		
EBITDA (Year 1))	\$40	Ending TEV			322		
Price paid		\$200	Beginning debt			120		
Interest rate		10%	Cash generated (total FCF)			34		
		10010000000000	Ending deb	Nt.		86		
Debt	60%	\$120				12	Approxi	mation
Equity	40%	80	Ending equity value			236	<u>MoM</u>	<u>IRR</u>
Total	100%	\$200	Beginning equity value			80	2.0x	15%
		1.7	Approximate EV Multiple			3.0x	2.5x	20%
			IRR			> 25%	3.0x	25%

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