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Integral (ISYS): Soar with satellites

By: [TheStockAdvisors.com](#) Wednesday, July 16, 2008 12:59 PM

Sectors: Computer and Technology
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Warning that "risk is very high in just about every sector," Dennis Slothower still finds value in satellite systems maker Integral Systems (NASDAQ: ISYS), his latest "stock of the month."



In Stealth Stocks, he explains, "Integral is one of the 100 fastest-growing technology companies and is placed in both the aerospace and defense sector." Here's his review.

"The Maryland company was incorporated in 1982, and builds satellite ground systems and equipment for command and control, integration and test, data processing, and simulation.

"Since inception, it has provided ground systems for over 200 different satellite missions for communications, science, meteorology and earth resource applications.

"ISYS has established a domestic and international customer base that includes government and commercial satellite operators, spacecraft and payload manufacturers, and aerospace systems integrators.

"ISYS has developed innovative software and hardware products designed to reduce the cost and minimize the development risk associated with traditional, custom-built satellite ground systems. It is a pioneer in offering a comprehensive commercial off-the-shelf software product line for command and control.

"As a systems integrator, it configures these products to provide turnkey satellite control facilities that can operate multiple satellites from most manufacturers. ISYS believes these systems offer significant cost savings for customers that have traditionally purchased a separate custom control center for each of their satellites.

"ISYS also owns and operates a wholly owned subsidiary, Integral Systems Europe S.A.S., with headquarters in Toulouse, France. ISI Europe serves as the focal point for the support of much of its European business. ISI Europe pursues ground systems business in Europe and Africa.

"As the nation's defense budget continues to head higher, ISYS should be the recipient of orders for satellite software and equipment. Currently, sales to the U.S. Air Force accounted for 55% of the company's revenue.

"Both the aerospace and defense sectors have strong momentum behind them, especially with the growing turmoil in the Middle East and the Israeli threat to bomb Iran's nuclear reactors. The stock is in a very steady uptrend that is justified by the company's rapid earnings growth.

"According to my numbers, ISYS should be selling in the mid-\$70s over the next three to five years. It is currently trading in the high \$30 range, so ISYS has large upside potential. Place a sell stop at 25% below your entry price."

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