

<b>Key data</b>	<b>Current</b>
Price (\$)	42.50
12 month price target (\$)	43.00
Market cap (\$ mn)	18,104.9

	<b>12/11</b>	<b>12/12E</b>	<b>12/13E</b>	<b>12/14E</b>
<b>Revenue (\$ mn) New</b>	<b>14,956.0</b>	<b>15,224.4</b>	<b>15,839.9</b>	<b>16,546.2</b>
Revenue (\$ mn) Old	14,956.0	15,224.4	15,843.6	16,622.0
<b>EPS (\$) New</b>	<b>3.58</b>	<b>3.03</b>	<b>2.81</b>	<b>3.22</b>
EPS (\$) Old	3.58	3.02	2.81	3.30
P/E (X)	11.9	14.0	15.1	13.2
EV/EBITDA (X)	7.4	7.7	6.8	6.4
ROE (%)	7.2	6.3	9.0	9.8
	<b>6/12</b>	<b>9/12E</b>	<b>12/12E</b>	<b>3/13E</b>
EPS (\$)	0.81	0.75	0.57	0.76