



3 Value Dividend Stocks to Buy Right Now

Description

Buying quality dividend growth stocks when they're priced at a value is a great way to build long-term wealth. It is also [a defensive way to invest in a long bull market](#). Without further ado, here are three value dividend-growth stocks to buy right now.

Pembina Pipeline ([TSX:PPL](#))([NYSE:PBA](#)) transports hydrocarbon liquids and natural gas products primarily in Western Canada. It also owns gas-gathering and -processing facilities and an oil and natural gas liquids infrastructure and logistics business.

The stock has retreated about 8% from its 52-week high to \$43.52 per share as of writing. This is a cheap price-to-cash-flow ratio of about 10.8 compared to the multiple of 12.7 to 16.6 that it had traded in the past four years.

The analysts from **Thomson Reuters** have a 12-month mean target of \$52.80 per share on the stock, which represents about 21% near-term upside potential.

Pembina currently offers a monthly dividend, equating a juicy yield of 5.24%. It has increased its dividend for six consecutive years with a five-year dividend growth rate of 4.9%. Its dividend per share is 5.56% higher than it was a year ago.



Canadian Tire ([TSX:CTC.A](#)) has about 1,700 Canadian retail locations under the brands of Canadian Tire, Mark's, Sport Chek, etc. It also has PartSource, which sells automotive parts and owns 295 Gas+ gasoline stations.

The stock has dipped about 10% from its 52-week high to \$161.62 per share as of writing. This is a decent price-to-earnings ratio of about 14.6 in comparison to management's earnings-per-share growth of +10% per year on average through 2020.

Canadian Tire is a quality retailer that has increased its dividend for seven consecutive years. Its three-year dividend growth rate is 13.2%. For the next few years, investors can expect dividend growth of about 10% per year.

Brookfield Property Partners L.P. ([TSX:BPY.UN](#))(NASDAQ:BPY) has a global portfolio of quality real estate properties with a focus on office and retail assets. The stock has corrected about 20% from its 52-week high to US\$19.62 per unit as of writing. This is a huge +30% discount from its book value of about US\$29 per unit.

Brookfield Property Partners has increased its distribution for five consecutive years with a three-year distribution growth rate of 5.7%. Its distribution per unit is 6.78% higher than it was a year ago. Going forward, it targets distribution growth of 5-8% per year. It currently offers a yield of 6.42%.

Investor takeaway

Pembina, Canadian Tire, and Brookfield Property are all excellent dividend stocks to buy today. Based on conservative estimates, they should be able to deliver long-term returns of at least 10% per year from an investment today. Of the three, I believe that [Brookfield Property](#) offers the best opportunity for value and income.

CATEGORY

1. Dividend Stocks
2. Energy Stocks
3. Investing

TICKERS GLOBAL

1. NYSE:PBA (Pembina Pipeline Corporation)
2. TSX:BPY.UN (Brookfield Property Partners)
3. TSX:CTC.A (Canadian Tire Corporation, Limited)
4. TSX:PPL (Pembina Pipeline Corporation)

PARTNER-FEEDS

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