
Modelon - Narrowing the path to profitability with SEK25m in cost cuts

Redeye comments on Modelon's recently announced cost reduction program and organizational changes. These reductions are expected to yield annual savings of SEK25m, fully effective by Q1 2025. We believe yesterday's sell-off presents an attractive entry point for investors in the mid-term perspective. This cost reduction accelerates Modelon's path to profitability, and we now estimate the company will reach breakeven in H2 2025 (previously mid-2026). Our new Base case fair value is SEK26 (up from SEK24).

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Attachments

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