
ADDvise Q3 2024 - Comparables set to ease from Q4 2024e

Redeye updates its estimates and valuation following ADDvise releasing its Q3 2024 report, which broadly missed our estimates. We judge that ADDvise should focus on reversing the recent trend in margins, cash flow, and organic growth in the near term. Any improvement will likely be a significant catalyst for the share in coming quarters. Notably, comparables should ease from Q4 2024e. We lower our estimates and valuation.

[Read more and download the Research Update.](#)

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Attachments

[ADDvise Q3 2024 - Comparables set to ease from Q4 2024e](#)