

Integrum - Getting ready for the marathon

Redeye reviews the Integrum case and provides a more clear-cut take on its longer-term outlooks. In short, we only include above-knee in our sales forecasts and lengthen our forecast period to provide a more realistic view of its sales growth runway. Despite a strong share price momentum in the past 12 months, we highlight the discrepancy to relevant peers' EV/sales multiples and see ample upside to our update DCF base case.

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

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Attachments

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