
Serstech - Outlook remains strong

Redeye updates its estimates and valuation following Serstech's Q3 2024 report. Sales, as expected, were significantly below forecasted figures, although solid cost control was a mitigating factor. Forecasts are revised downwards for 2024e based on management commentary, which results in a lowered fair value range. Nevertheless, Redeye's Base Case still indicates a 60% upside to the current share price, and we expect strong order intake during year-end and early 2025e to close the gap.

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Attachments

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