
Alelion - Recharged and ready to take on growth opportunities

Redeye resumes coverage of Alelion following the company's recent rights issue. We keep our base case intact, following a lower WACC, lower near-term estimates and Q4 equity injection. On the business side, we see continuous progress in special vehicles as order intake has improved somewhat despite covid-19. However, with long lead times we do not expect a swift turnaround. Moreover, if additional orders are booked following recent activity – our estimates could see significant upside potential.

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Attachments

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