
Nepa - Cost Base Too High to Withstand Challenging Market

Redeye argues that Nepa's Q1 report was weak, especially with regard to the company's cost control. There were however bright spots, and Nepa's subscription business in Marketing Optimization still delivered decent y/y growth. While Nepa is taking actions towards reducing its cost base, Redeye is unsure whether it is enough, or if more is needed. Redeye lowers its valuation but sees a significant upside if management executes well.

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

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Attachments

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