
XVIVO Update - Sustainable structural growth

Redeye updates our outlook on XVIVO. The company had underperformed the local equity market despite validating its growth capacity and ability to improve its operational leverage. With the US launch of Kidney Assist Transport, the ability to increase prices and secure high volume growth is attractive. XVIVO expands both the solution portfolio, the regional reach, the reimbursement reaches, and synergistic acquisitions. We increase our base case to SEK 375 (360) with a Bull of SEK 785 (470) and a Bear case of SEK 105 (195).

Read more and download the Research Update.

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Attachments

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