

OEM Q2 2025 - Short-term headwinds, long-term optionality

Redeye updates its estimates and valuation following OEM's Q2 2025 report. FX headwinds throttled growth and diluted margins more than we expected, though we consider these adverse effects temporary. Despite short-term uncertainty, we judge OEM's long-term prospects remain essentially unchanged. The company maintains considerable headroom for both bolt-on deals and platform acquisitions.

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Attachments

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