

## Arise - Positioned for high activity in H2 2025

Arise presented a quarter with many moving parts and one-off effects that blurred the underlying financial performance. In addition, Q1 2025 faced tough comparable numbers. Despite all this, we think that the underlying Q1 numbers were more or less in line with our estimates, and we think that the share price reaction since the report's publication (~7%) is rather unwarranted. We think this could present an attractive entry-point for the long-term investor (or even the short-term investor) given that H2 2025 should generate at least two project transactions – which we consider strong catalysts. We update our estimates and fair value range following the report.

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### Attachments

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