
Vitrolife Q4 - Strong margins and gradually improving Genetic Services

Vitrolife's Q4 delivers a high 56.9% gross margins despite a quarter with an unfavorable Technology and Consumable mix. Another positive is that the US Genetic Services headwind is gradually fading, and we expect the next, more significant improvement to be delivered after Q1 in 2024. Our updated view is a base case valuation of SEK 245 (235), a Bull Case of SEK 400 (375), and a Bear Case of SEK 100 (95).

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Attachments

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