
Polygiene Group - Q2 Review – Temporary Setback

Redeye returns with revised estimates following Polygiene's Q2 2025 report, which was on the weak side, mainly driven by weak sales for Addmaster. We expect the negative demand effects to be transitory, while the timing of recovery in the upcoming quarters is uncertain, as for the whole industry. As such, we lower our near-term expectations on sales, which results in a lowered valuation range. Still, we argue that the effects are transitory, staying positive to the long-term case at an attractive valuation.

Read more and download the Research Update.

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Attachments

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