

Episurf Medical Q2 2025 - Negative impact due to ongoing restructuring

Redeye provides an update following Episurf Medical's Q2 2025 report, where net sales came in below our expectations, primarily due to the ongoing restructuring initiatives impacting European sales. In light of the report, we have made revisions to both our sales and OPEX estimates, reflecting the near-term effects of the restructuring and a longer-than-expected path to US commercial clearance for the Episealer MTP implant. As a result, we make downward revisions to our fair value range.

Read more and download the Research Update.

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Attachments

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