

Transtema - Softer Markets Hurting

Redeye maintains its positive view despite lowering its Base Case and forecasts significantly. Organic sales growth was -16% y/y and while the EBITA did not match our expectations, the EBITA margin increased somewhat q/q. Despite the significant cut in our Base Case, where our new assumptions are much more defensive, Transtema is still trading at a substantial discount to our revised Base Case.

Read more and download the Research Update.

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Attachments

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