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MedCap (Q3 review) - Healthy Q3 figures

Redeye updates its estimates and valuation following MedCap's Q3 2025 report. Both sales and adjusted EBITA beat our forecasts. Encouragingly, organic growth of c9% y/y represented a continued sequential improvement. M&A activity has ramped year-to-date. We believe soft organic growth comparables and substantial financial M&A capacity bode well for coming quarters, though the share's price seemingly reflects this potential.

Read more and download the Research Update.

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Attachments

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