

Enea - Turning the corner on organic growth

Redeye states that Q1 beat estimates across the board. Importantly, the beat was related to Enea's focus areas, Network and Security, while the unimportant Operating Systems came in below estimates. After a long period of zero or negative organic growth, Enea showed c10% y/y growth for its core segments, and c5% total organic growth if adjusting for last year's one-off income in Operating Systems. This is an important milestone - and key to fuel the share price. Following the strong report, Redeye raises its estimates and fair value range.

[Read more and download the Research Update.](#)

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Attachments

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