
Integrum Q1 - Disappointing quarter hurting the confidence

Redeye returns with a more detailed take on the Q1 report. While the share price reaction is understandable, we argue that the disappointing Q1 sales are not evidence of a worsened long-term sales outlook. Rather, it hurts the confidence in the company in the short term. We lower our base case but emphasise that on our relatively untouched sales forecasts, the current share price presents a significant gap to its peers on EV/sales multiples.

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Attachments

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