
Dignitana Q4'23 - Positive momentum into 2024

Redeyes' long-term view of Dignitana is intact even if the sales progression was softer than we expected. The reimbursement process takes time; however, there are positive signs about a good start in the US regarding installed systems. The costs were again well contained, and with a more robust gross margin, the results came roughly in line with expectations. To be cautious, we have lowered our sales estimates for 2024/25e. The growth is still expected to be strong, albeit at a lower rate. With the downward adjustments, our new Base case value is SEK 9.5 (10) per share, with a fair value range of SEK 2.9 to 20 per share.

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Attachments

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