
Top Picks: Taking Home Gains and Rotating into Conviction

Today we are making five changes to Top Picks. We take home gains in one of our largest holdings, exit two positions where the risk/reward no longer earns its place, initiate a new high-conviction position in a high-quality compounder, and add to a recent winner. Taken together, the moves lift the average quality of the portfolio while rebuilding our dry powder to around 4%.

[Read more.](#)

About Redeye Nordic Growth AB

This is a press release from Redeye Nordic Growth AB, a equity research firm specializing in Nordic growth companies within Tech and Life Science. Redeye Nordic Growth is a part of the Redeye group, which also offers services within corporate finance advisory and fund management. <https://services.redeye.se/>

Attachments

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