
Xspray Pharma Q2 2024 - Another CRL but long term asymmetric risk /reward remains

Redeye updates its view on Xspray following the Dasynoc CRL and the Q2 report. Adjustments to our valuation model, including a postponed launch and additional equity funding to maintain the development pace in the pipeline, have resulted in a lower fair value range. However, the upside remains significant if things unfold somewhat according to our base case.

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Attachments

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