

Moberg Pharma (Q3 Review) - European footprint expanded, strengthening mid-/long-term outlook

Redeye views the Q3 report as solid, with sales slightly ahead of expectations and tighter cost control than anticipated. The key milestone — the Karo Healthcare licensing agreement, which covers all major EU markets and the UK — was announced after the quarter. Following this development, Redeye has updated its estimates and valuation, reflecting downward revisions for 2026–2027e. Yet, the expanded European market supports higher forecasts from 2028e onward. In addition, a higher financial score in our Redeye Rating further supports a positive impact on valuation.

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Attachments

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