
Beijer Group - Mind the Gap

Redeye updates its estimates for Beijer Group following a review of its Q1 2022. Beijer Group continued to report excellent order intake numbers, while the global component shortage hampered its sales conversion. Still, the signaling value in the recent quarters' impressive order intake should weigh heavier than external headwinds, as it proves that Beijer Group is well-positioned and is taking market share with its renewed product portfolio. This should become increasingly visible for the group's profitability as we advance, and Redeye argues that the discount to peers is too large, given its recent performance. The order intake is the leading indicator.

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Attachments

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