

Doro - King of the Hill

Redeye only makes minor estimate changes, following Doro's Q1'21 report. We maintain our valuation, even though Q1 Care sales were unsatisfactory. We have received higher conviction regarding our Care estimates due to the main Nordic competitor, Tunstall, being excluded from the new Swedish framework agreements, making Doro the king of the hill. This strengthens the spin-off case, in our view.

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Attachments

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