
Modelon (Q3 Review) - Efficiency gains and expanding use cases

Redeye updates its forecast and valuation following Modelon's Q3 2025 report, which was broadly in line with expectations. While ARR growth remains challenged by macroeconomic uncertainty and planned reductions in legacy services, Modelon Impact continues to grow, and operating efficiency has improved further. The company is taking clear steps toward profitability while maintaining a healthy cash position. These factors, together with broader adoption among existing clients and strategic new use cases, support our long-term investment thesis.

Read more and download the Research Update.

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Attachments

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