
Cellavision Q3'2024 - Underlying momentum intact

Redeye's view on the Q3 report. The organic growth was decent, with a gross margin that progressed. The deviation in results vs. expectations came mainly from a higher R&D cost and, to a lesser degree, from lower net sales than expected. We have decreased our sales estimates slightly due to the volatility in the geographical areas and the result deviation in the quarter. With these changes and balance sheet adjustments, we maintain our Base case SEK 250 (250) and the fair value range of SEK 165 – 388 per share.

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Attachments

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