Safeture (Q3 Review) - The ARR Strikes Back

Redeye updates its estimates and valuation on Safeture following the Q3 2025 report. We argue that the quarter’s highlight is the return to sequential growth in ARR, where the ARR base grew by c3% q/q. Sales were mostly in line with estimates, whereas the gross margin was slightly higher than foreseen. Taken together with the seasonally higher vacation outtake in the third quarter, this led to positive EBIT for the fourth time in the past five quarters. We largely maintain our estimates and keep our fair value range intact.

Read more and download the Research Update.

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Attachments

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