

Orexo - Pressure on revenues

Redeye lowers Orexo's valuation to SEK 42 per share as it becomes clear that there is persistent weakness in the company's revenues due to pressure from generics (Zubsolv) and slow implementation of digital therapies reimbursements. Orexo's new drug delivery platform AmorphOX might be the new innovative solution that sustains revenue growth in the future, but mid-term Orexo will struggle to sustain and improve revenues, in our view.

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Attachments

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