
Dignitana Q2'24 - Lowering expectations

Redeyes' long-term view of Dignitana is, to a degree, intact, even if the sales progression has been a disappointment. The market fundamentals are still positive, and Dignitana should be able to improve its growth. The new CEO will likely have an impact on this during 2025e. We have cut our expectations for 2024e, which means flat sales from 2023 and a more significant negative result. With the cut of estimates, our new Base case value is SEK 5.7 (8.2) per share, with a fair value range of SEK 1.8 to 14 per share.

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Attachments

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