
Gasporox - Close to sustained profitability

Redeye states that Q2 2024 was solid, beating estimates across the board. Redeye is encouraged by Gasporox's product expansion and sustained profitability trajectory. Gasporox is close to achieving its sustained positive free cash flow target, which was declared concurrently with the convertible debt raised in 2022. Despite management being on track to reach its target, Gasporox trade at its lowest EV/S over the past three years, giving little credit to management's execution. Redeye reiterates estimates and fair value range.

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Attachments

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