

## Fable Media Group - Unlocking additional cash flow

Redeye updates its estimates after reviewing Fable Media Group's Q1 report, which was softer than our expectations. The company has fully settled its earn-outs and will therefore unlock additional cash flow, which can be allocated to growth investments or repurchases of its outstanding bond. Although Redeye does not expect any top-line growth in 2025 due to the regulatory changes in Brazil, we still anticipate healthy margins and strong cash flow, providing FMG with the opportunity to continue strengthening its balance sheet throughout the year.

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### Attachments

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