
Alelion - Warming up ahead of H2 2023

Redeye makes minor estimate revisions and updates its fair value range following Alelion's Q1 report. We argue the report held several positives, including price increases that supported the margin. On the contrary, Alelion and its customers are still affected by component shortages, which postpone deliveries (affecting the timing of the sales curve). However, with a record-high order book of SEK230m for delivery in 2023, Alelion is warming up ahead of H2 2023, where we expect very high sales growth. But before then, we believe a share issue needs to occur in the coming quarter to fund Alelion's growth in the coming years.

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Attachments

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