

## Sleep Cycle - Headwinds in the short-term, momentum in strategic initiatives

Redeye has updated its estimates and valuation for Sleep Cycle following the Q2 2025 report, which was characterised by softer subscription growth but resilient profitability and momentum in strategic initiatives. New subscriber intake remained weak, reflecting continued headwinds in the app store-driven segment, while retention improved and partnerships delivered robust growth. At the same time, initiatives such as Powered by Sleep Cycle and the ongoing sleep apnea screening project highlight the company's transition toward a broader, more diversified business model.

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### Attachments

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