
Kancera Q3 - Heartfelt ambitions

Redeye returns following Kancera's strategic shift to focus on cardiovascular diseases and its Q3 report. We reassess our take on the case, reconsidering the timeline of future possible deals, lowering assumptions regarding the KANDOVA study, and raising assumptions regarding the myocardial infarction project. Updated capital needs assumptions, and an increased WACC, also impact our DCF valuation. Our fair value range is lowered.

[Read more and download the Research Update.](#)

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Attachments

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