
Arise - Heading towards peak production period

Redeye updates its fair value range following Arise's Q3 report, which we consider very solid. However, we reduce our expected profit multiples for divested capacity going forward, as the Fasikan divestment in October did not live up to our previous expectations. We, therefore, take a more cautious stance going forward in this challenging market. The production segment fired on all cylinders in Q3, generating a realised revenue per MWh almost 70% higher than the average market price during the period. Arise is now headed towards the windy and cold winter months, where production and electricity prices are typically high. We therefore look forward to Q4 and Q1, coupled with the new share buyback program, which we deem value accretive.

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Attachments

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