
Westpay - Innovating The Revenue Model, Substantial Value Creation

Redeye sees substantial value creation in Westpay's last strategic changes in the POS partner approach and innovation of the revenue streams. The base case is increased to 4.2 SEK per share with an upside of 83% from today's share price of 2.3 SEK. We see substantial potential in the newly announced revenue stream which is based on transactions, as it will increase the monetization of their customer base and the gross margins are close to 100%. Pandemic and financial liquidity are affecting the share in the short term, but in the long term, we see substantial value creation with the recent strategic changes.

Read more and download the Research Update.

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Attachments

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