
XVIVO - Stepping up the pace during 2024

Redeye updates our outlook after Q4 2023. XVIVO delivers improved gross margins with a softer organic growth of 12% (CER) and a quarter with higher OPEX. Thoracic disposables recorded sales below expectations, with surprisingly high gross margins at 85% in Q4. The outlook remains positive, and the critical US Heart study has started. We reduce our base case to SEK 425 (450) with a Bull of SEK 850 (900) and a Bear of SEK 95 (105).

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

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Attachments

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