

## InfraCom - Stable foundation, discount persists

Redeye stated InfraCom's Q1 2025 report provided further evidence that the company has overcome execution issues from the past year. With increased profitability and seemingly stable foundations for growth, Redeye is positive on the stock. Redeye has raised its EBITDA estimates by 6-19% for 2025-2028, driven primarily by higher assumed profitability. At a 2025 EV/EBITDA of 5.7x, InfraCom trades at a discount to its five-year average of 10.3x and a 20% discount to peers.

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### Attachments

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