
Eniro Group - Cutting costs

Redeye updates its estimates and valuation following Eniro's Q2 2025 report and a change of lead analyst. The report was broadly below our estimates, where a 16% y/y sales decline in Dynava is seen as the main surprise. We lower our estimates somewhat across the forecasting period, and make a few valuation-related changes as a result of the analyst change. Our fair value range is lowered, although with slightly mixed effects across our three different scenarios.

Read more and download the Research Update.

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Attachments

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