
Arise - New financial targets could likely end up being a low-water mark

Redeye updates its estimates and fair value range following Arise's capital markets day and the new financial targets presented in conjunction with the event. The financial targets of divesting 400MW during 2024-2025 and >500MW on average pa during 2026-2028 were below our previous forecast but should still generate attractive profit levels if met. As a result, we now expect an average of >SEK300m pa in EBITDA from the development segment in 2024-2026. Furthermore, combined with Arise's production segment, which we expect to generate SEK280m pa in EBITDA during 2024-2026, the accumulated cash flows quickly add up close to the current enterprise value of SEK1.7bn.

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