# Vitec Q2 2025 - Stormy waters, smoother sailing ahead

Redeye lowers its estimates and valuation following Vitec's Q2 2025 report. A larger-than-expected y/y normalisation of Enova's revenues constituted the main driver for sales and earnings significantly missing our projections. We judge coming quarters will provide smoother sailing and believe Vitec's share has returned to undemanding levels.

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**Attachments**

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