
Embracer - Soft near-term outlook, solid longer-term pipeline

Redeye updates on Embracer after Q4-results where we have lowered estimates owing to a softer-than-expected outlook for 2025/26E, while a solid game pipeline suggests improved performance in the following years. We also updated our fair value range and the SOP-valuation on the back of the upcoming spin-off of Coffee Stain Group.

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Attachments

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