
Sensys Gatso - Long-term Growth Topped with Special Situation

Redeye maintains its long-term view of Sensys Gatso as a recurring revenue growth story. In addition, we see a short-term special situation, backed by the Q2 record order intake in System Sales, as the big order book will lead to accelerated growth during the coming quarters. Historically, Sensys Gatso has been like a snake that feeds on one big meal every second year. The recurring revenue of TRaaS is already gradually changing this dynamic, but it also seems that the demand for System Sales is becoming stronger, although we have yet to include it in our estimates for the long run.

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Attachments

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