

Acarix Q1 - Strong foundation for eventual ramp-up

Redeye provides an update on Acarix following its Q1 report, which showed continued growth in revenues and installed systems—albeit below our expectations. We update our estimates taking a more cautious stance, assuming more growth capital will be required before the company becomes self-sustaining. We believe the absence of fixed reimbursement from private and public payors in the US remains a key bottleneck for the sales growth trajectory. We update our fair value range accordingly.

Read more and download the Research Update.

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Attachments

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