

## Indutrade Q2 2025 - Organic headwinds persist, M&A likely to ramp in H2

Redeye updates its estimates and valuation after Indutrade's Q2 2025 report. Larger-than-expected organic headwinds led to both top and bottom-line misses versus our projections. While we judge headline figures looked worse than underlying fundamentals suggest, Indutrade's organic recovery proceeds more slowly than we pencilled in. Still, we believe the company will realise solid operating leverage once demand turns around.

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### Attachments

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