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Enea (Q3 Review) - Growth needed to escape the doldrums

Redeye notes that Enea's Q3 report came in below expectations, showing lacklustre growth while margins remained solid. Redeye believes the weaker-than-anticipated quarter was partly due to a few deals not being signed, which stokes hopes for an improved Q4. After several years of single-digit organic growth, Redeye finds the market discounts Enea’s long-term double-digit growth target. With margins already robust, Redeye believes improved growth will be the primary driver for the share. Consequently, the upcoming strategy update, set to focus on accelerating growth, is the primary fillip. A credible plan could warrant estimate revisions and drive the share higher. Redeye adjusts its estimates and fair value range following the report.

Read more and download the Research Update.

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Attachments

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