

Dignitana Q4'24 - Improving sales momentum

Redeyes' long-term view of Dignitana continues to be positive. The sales improved more than expected, and the company likely has a new momentum. The cost control was reasonable. The market fundamentals are still positive, with the CPT 1 codes and CMS decision. The market likes the indication that a rights issue is likely out of the question. We have decreased our expectations slightly while the new year, and fine-tuning the balance sheet is a positive factor. With these minor changes, we lower our Base case value to SEK 5.3 (5.5) per share, with a fair value range of SEK 1.6 (1.8) to 14 (13) per share. Following this report, we also change the lead analyst.

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Attachments

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