
XVIVO Update - Excellent organic growth and a negative currency surprise

XVIVO delivers impressive organic growth with reported sales below market expectations due to FX (currency) headwind. The increased disposable capacity contributed to 54% growth of Thoracic disposables (62% for the whole Thoracic business based on CER), the service offer is subject to improvements, and Abdominal disposables had a modest quarter at 13% organic growth. Our updated Base Case is SEK 565 (575) with a Bull Case of SEK 1,150 (1,100) and a Bear Case of SEK 165 (165).

[Read more and download the Research Update.](#)

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