
Surgical Science Q4 2024 - Growth should ramp in 2025e, margins might lag

Redeye updates its estimates following Surgical Science's Q4 2024 report. While we judge top-line growth was solid, margins were rather soft. Surgical Science recently announced the closing of its Intelligent Ultrasound acquisition and that 100% of da Vinci 5 system will feature simulation with a subscription-based model. Further, the company won a larger Educational Products tender. We update our estimates and valuation.

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Attachments

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