
Smart Eye (Q3 Review) - Buckled Into the Driver's Seat

Smart Eye's Q3 report tracked closely with our expectations, with Automotive once again acting as the primary growth engine. Strong momentum in license revenue, improving customer rollout visibility, and a seasonally strong period ahead for Behavioral Research all support a solid finish to the year. We see no drama in the balance sheet following the addition of a SEK50m credit facility. While we take a slightly more cautious stance on the timing of the 2026 license ramp, the long-term view remains unchanged, and our Base Case of SEK115 is maintained.

Read more and download the Research Update.

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Attachments

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