
Vitrolife - Industrious and purposeful consolidation

Vitrolife's CEO Bronwyn Brophy came across as executive and resourceful during her first CMD at Vitrolife. The new 5-year target is >10% organic growth target is perhaps the most interesting. Our take is that Vitrolife has established a sufficient footprint where future opportunities are more related to regional commercial opportunities, innovation combined with complementary acquisitions supporting the vertical integration strategy. Our updated view is a base case valuation of SEK 235 (220) and a Bull Case of SEK 375 (330), and a Bear Case of SEK 95 (95).

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