

VIVEVE MEDICAL IS A SINKING SHIP, \$0.90 PRICE TARGET

June 12, 2018



RESEARCH SUMMARY

Viveve Medical (VIVE) had a horrendous Q1 2018 report with a big revenue miss, decreased gross margins, and a \$12M loss.

With the company's sizable expenses, it will take over 4x as many sales as they have now just to have a break-even year.

The Viveve System got FDA 510(k) regulatory clearance in the US in October 2016, almost two years ago,

there's now market saturation, and the easy sales have already been taken.

Viveve management's recent actions show desperation, such as the CEO's abrupt departure and the permanent replacement with the CFO.

Viveve is now attempting to have other indications for the Viveve System that we do not believe will work, and expand to other products, but those sales have flopped.

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