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Body

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BUY Sonic Healthcare (SHL) Continues to deliver base business revenue growth, and cost cutting measures should begin to drive profitability from this year onwards.

Dexus (DXS) Recent signals from the office property market have been encouraging. Dexus is trading at a near 20 per cent discount to net tangible assets, with a solid yield.

HOLD **Iluka Resources** (ILU) **Iluka** remains high-quality exposure to an eventual recovery in Chinese housing, with a potential near-term catalyst of a funding agreement for its Eneabba Rare Earths project.

Audinate Group (AD8) Weak 2025 sales guidance likely represents a delay, rather than fundamental de-rating, in the audio-visual software developer's longer-term growth story.

SELL Johns Lyng Group (JLG) After underwhelming results last month, uncertainty about strata management suggests risks remain tilted to the downside.

Suncorp Group (SUN) While sale of the banking unit provides capital, it also means Suncorp is now fully exposed to insurance trends.

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