

"The key metrics aren't so much December like-for-like, but rather customer relevance and market positioning."

"Our focus is on market position; retailers gaining active customers and market share are set to accelerate their performance over the next two-to-three years, much of which is being ignored by conservative forecasts that are anchored to slow lockdown recovery rather than active customer numbers."

In this sense, analysts favoured those companies with an accelerating active customer base, such as AO World (LON:AO.), boohoo (LON:BOO), Dunelm (LON:DNLM) and Pets at Home (LON:PETS).

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Contact us +44 (0)207 989 0813 action@proactiveinvestors.com

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