

AMGEN - Still Worth Holding!

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Abstracts

Amgen (AMGN) has sufficient cash (total cash: \$19.6b, Lt. Debt: \$21.4b) and experience to search and sustain its leadership in the biotech space through investing in innovation – novel targets or collaboration with Watson, preparing for the “Biosimilar Onslaught”. Recent acquisition of Micromet (MITI, for \$1.16b) is another effort to enhance the pipeline strength, and we expect AMGN to continue its hunt for another Enbre! While another “denosumab” from the pipeline is yet to come, high risk clinical milestones (Talimogene laherparepvec, PhIII – mMelanoma; Omecamtiv mecarbil, PhII – Heart Failure; and AMG-785, PhII – fracture healing) could keep the stock volatile. Even after current run-up, it is still trading at a favorable multiple against its peers. For more details, please read our report released on 9th Feb., 2012 titled “Still worth Holding!”

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COMPANIES MENTIONED

AGEN

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