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Amylin Take Over Battle - A 25 -50% upside is very much there

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Abstracts

Post retaining full rights for Byetta/Bydureon franchisee from Lilly, Amylin became a target of acquisiton for global pharma giants. We see the bid going up much further, Amylin as a potential leader in the GLP-1 space, can very well justify a 25-50% upside to the current price, based on a $3billion peak sales forecast for the exenatide franchise (Byetta, Bydureon-weekly and Bydureon once monthly pen formulation). The argument for a $3billion peak sales are very justifiable looking at First in class, once weekly (robust HbA1C reduction, lower hypoglycemia, significant weight loss) of GLP-1’s; A growing base of evidence around the long term safety of exenatide (it is now 7 years after launch); A waning competition - The failure of taspoglutide, delay in development of weekly versions by Novo and albiglutide’s below par clinical profile (less weight loss, mild efficacy); Tainted profile of Actos because of Bladder cancer related Safety warning by regulators creates an opportunity for GLP-1’s to fill the gap and etc"

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Contents

COMPANIES MENTIONED

Bristol-Myers Squibb, AstraZeneca, Novartis, Amylin

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