

ANTHERA PHARMA - Portfolio of More than Just a "Me Too" = Better Commercial Opportunity

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Abstracts

We have been covering ANTH since Oct. 2010 with a TP of \$9 (CMP: \$8.47, revised TP: \$12). Based on the recent discussion with ANTH's management (more clarity on its lead drugs – Varespladib, ACS and Blisibimod, Lupus, its market sizing, and financials), we reaffirm our view that there is room for further upside even with a cautious view on the outcome of the trials. We remain neutral to positive on the outcome after reviewing the interim efficacy analysis data of the PhIII trial (VISTA-16, design is summarized in Annexure) of Varespladib (formerly A-002, PhIII, Acute Coronary Syndrome-ACS, unpartnered). Moreover, Varespladib's favorable effect on LDL (44% reduction in LDL-c vs. no change seen with Darapladib) and physicians' comfort with its safety profile so far could justify premium pricing over statins/ anti-platelet therapy hence we have increased the peak sales of varespladib from \$750m to \$1.35b and the probability of success to 45%.

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