

ASTELLAS - DPP IV Royalty Sold Below Par - Another Wrong Move by the Management!

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Abstracts

Astellas has announced to sell future royalty of DPP IV inhibitors for \$609m to Royalty Pharma, which it has acquired along with OSI acquisition. We do not find any convincing rationale behind this decision. Potential threat to DPP IV class or immediate need of cash could have justified this move - our analysis suggests neither is the case! Presently royalty earned from marketed drugs and most advanced pipeline candidate translate into >\$750m for Astellas. With modest efficacy and fewer side effects, DPP IV inhibitors have picked up remarkable market share WW are securing its position as early therapy tool. We find DPP IV inhibitors secure and will keep on growing in the anti-diabetic class worth ~\$21b. Fall of PPAR further strengthens DPP IV inhibitors position, by 2018, DPP IV is expected to account for ~40% of the US anti-diabetic market.

Contents

COMPANIES MENTIONED

ASTELLAS, 4503

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