

ATLAS ACS 2-TIMI 51 ACS - Major bleeding will restrict potential in ACS

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Abstracts

Robust mortality benefit demonstrated by Xarelto in ACS patients, though at the cost of higher major TIMI bleeds (but less fatal bleeds), warrants an approval for sure. Our discussion with cardiologists suggests that the uptake is likely to be slow and the drug would be initially positioned in the high risk patients (with low bleeding risk) and ACS patients presenting with concomitant Atrial Fibrillation (~ 3-10% of the ACS patients). We forecast \$XX in peak sales for Xarelto in ACS and \$XX across all indications (DVT treatment would be the largest single indication).

Contents

COMPANIES MENTIONED

PFE, BMY, Bayer

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