

BIOGEN IDEC - Restructuring of Tysabri Collaboration with ELAN - A Good Strategic Move!

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Abstracts

Biogen Idec (BIIB) has acquired full rights to Tysabri from Elan for an upfront payment of \$3.25b and a double-digit tiered royalty structure. Integrating this in our model the net positive impact to NPV/s of Tysabri is \$9.4 (current NPV/s of Tysabri: \$40 vs. previous NPV/S: \$17 and cash outflow of \$13.6). The revised FY2013, total revenue (pro-forma basis) is \$6.4b vs. previous of \$5.8b) and EPS will be accretive by \$0.88 (current EPS: \$8.11). We expect robust growth for BIIB in 2013 with the approval and launch of TECFIDERA (BG-12, dimethyl fumarate, under review with FDA & EMEA, est. PDUFA: late Mar. 2013, peak sales potential WW – \$2.5b by 2018) and approval of Hemophilia products – rFVIIIFc (PR, Hemophilia A) and rFIXFc (R, Hemophilia B) by YE13.

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