

# **BMY 4Q-11 Results – Patent expiry pains reflecting in the guidance**

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## **Abstracts**

Post today's announcement of 4Q-11 results, we reiterate our underperform rating on BMY with a PT of \$26. The 2012 EPS guidance range of \$1.9 - \$2.0 is reflective of the towering pressures, while valuation continues to remain soaring. BMY holds a promising HCV pipeline, but seems priced to perfection. Yeryoy continues to grow, but the ramp up will be soon plateau, as physician gain experience on the drug response, entry of competition (Allovetin, Oncovex, Nab-paclitaxel) and evolution of biomarker data. Growing reimbursement hurdles in EU countries will significantly restrict the drug penetration.

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