

BMY, Eliquis Complete Response – Another disappointment from Late Stage pipeline for BMY

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Abstracts

The complete response letter to Eliquis, was entirely unexpected, and should impact sentiments. We see a ~10% negative stock price reaction as BMY's valuations have been stretched, and there was no room for any negative news. The USFDA has requested additional information related to data management and verification from ARISTOTLE trial, which BMY is confident of submitting expeditiously. A 6 –month delay is imminent and we will see an overhang for the stock price till then. This delay in Eliquis approval, will obviously give some additional time for Xarelto and Pradaxa to strengthen their position in SPAF space. We continue to expect Eliquis uptake would be slow and estimate peak sales of \$1.5b and recommend investors to exit. We see Roche as a safer haven with several pipeline triggers that could lead to a rerating.

Contents

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