

Celgene: Long-Term Prospects Intact but Competition Emerging!

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Abstracts

Despite flat growth of Revlimid (L, RRMM, MDS), reported in its 1Q12, we expect Celgene (CELG) to meet its FY12 guidance (Total rev.: \$5.4-\$5.6b and EPS: \$4.7-\$4.8) with no further ramp up of sales. We have revised our peak sales potential of pipeline compounds in our model. In the report, we have discussed the entire possible scenario with regard to recent pipeline updates including possible delay or competition to its lead and/or late-stage pipeline products. For more detail, please read our report, released on 12th June on CELG, titled "Long-Term Prospects Intact but Competition Emerging!"

Contents

COMPANIES MENTIONED

Celgene

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