

Chugai, Possibilities of Roche Increasing its Stake In Chugai Are Real & High!

<https://marketpublishers.com/r/CF585902D9CEN.html>

Date: June 2012

Pages: 4

Price: US\$ 140.00 (Single User License)

ID: CF585902D9CEN

Abstracts

Approaching October will bring liberty for Roche to exercise its right to increase its stake in Chugai. Roche has been quick in exercising such options in past, and following our recent meeting with Chugai we develop a sense that such possibilities exceed the prevailing beliefs. Increasing stake in Chugai offers multiple level benefits to Roche – both from strategic and financial point of views. Interestingly, Roche has cited a number of times in past that Chugai will remain listed in Japan – we find that under Japanese regulations, Chugai can remain listed even at 5% floating stocks – suggesting Roche can buy as high as ~94.9% of Chugai after September, 12 i.e. another ~35% shares – this brings a ~safe opportunity for investors to seize buyout premium upside.

This piece, attempts to take a closer look at the situation, examine the possibilities and rationale of Roche increasing its stake in Chugai, and the possible course of action to attain this under Japanese regulations

Contents

COMPANIES MENTIONED

Chugai, Roche

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