

Dolutegravir - SAILING Data Confirms Best in Class Integrase Inhibitor - More Threat to Elvitegravir than Raltegravir

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Abstracts

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Clinical data from PhIII SAILING study announced yesterday demonstrated dolutegravir's statistically significant superiority as compared to Isentress in treatment experienced HIV patients. The data confirms best in class clinical profile of dolutegravir with once daily advantage amongst integrase inhibitors (Raltegravir, Elvitegravir). MRK's raltegravir (Isentress) is the only integrase inhibitor on the market (2012 sales \$1.3b) and ~90% of its total worldwide sales comes from the treatment experienced patient pool. We forecastThe Market Dynamics - once all three Integrase inhibitors are on the market Dolutegravir launch is expected in August 2013 (PDUFA – August 17th-2013) and we expect it to initially grab a share.....

Companies mentioned

GlaxoSmithKline, Pfizer, Merck, Shionogi

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