

# Dr Reddy's lab - US Drives Sales Growth, API saves margin.

<https://marketpublishers.com/r/D858C4DA314EN.html>

Date: October 2011

Pages: 8

Price: US\$ 140.00 (Single User License)

ID: D858C4DA314EN

## Abstracts

Dr Reddy's - US Drives Sales Growth, API Saves Margin

Dr Reddy's Q2 FY12 result that was slightly higher than our sales estimate, but was in line with our earnings estimate. API performance accounts for the bulk of the outperformance along with US generics and Russia and CIS markets. Despite a slew of low competition launches and 600 bps improvements in API gross margin, the EBITDA margin for Q2 FY12 remained marginally lower Y-o-Y. This highlights our oft repeated stance that the low competition launches have many product specific challenges that reduces the lucrative ness of the portfolio. We do not change our FY12 estimates.

We reiterate our Market Perform rating with a target price of Rs.1615.

## Contents

### COMPANIES MENTIONED

Dr Reddy's lab

## I would like to order

Product name: Dr Reddy's lab - US Drives Sales Growth, API saves margin.

Product link: <https://marketpublishers.com/r/D858C4DA314EN.html>

Price: US\$ 140.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

[info@marketpublishers.com](mailto:info@marketpublishers.com)

## Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/D858C4DA314EN.html>

To pay by Wire Transfer, please, fill in your contact details in the form below:

First name:  
Last name:  
Email:  
Company:  
Address:  
City:  
Zip code:  
Country:  
Tel:  
Fax:  
Your message:

**\*\*All fields are required**

Customer signature \_\_\_\_\_

Please, note that by ordering from marketpublishers.com you are agreeing to our Terms & Conditions at <https://marketpublishers.com/docs/terms.html>

To place an order via fax simply print this form, fill in the information below and fax the completed form to +44 20 7900 3970