

Eisai, Halaven: Uncertainly Mounts Over 2nd Line Approval!

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Abstracts

We see Halaven failure vs. Xeloda in Study-301 a setback for Eisai which has built high expectations around the drug from its probable approvals in several indications and crossing \$2b peak sales (our expectations are half to this i.e. \$1b) – approval in 2nd line breast cancer is most important step towards achieving this where it fails to meet expectations! Though Halaven has shown better acceptability than its closest competitor Ixempra (BMY), competition is mounting and we expect it to reach half of the Eisai's estimates i.e. ~\$1b in best case scenario.

Following Halaven, Eisai has three late stage candidates –E-2007/ perampanel, E7080/ lenvatinib and MORAb-003/ farletuzumab, however, none of these will have enough potential to nullify the loss of Aricept and Aciphex in their best case scenarios.

Contents

COMPANIES MENTIONED

Eisai

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