

ELAN- A Tale of Two: Tysabri = Support; Bapineuzumab = Upside

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Abstracts

Tysabri's (partnered with BIIB) best-in-class efficacy and REMS program for PML risk have driven and anchored Elan Corp.'s (ELN), but future growth is highly dependant on the success of Bapineuzumab (Bapi., PhIII, partnered with PFE and JNJ, Alzheimer's disease – AD) in at least a sub-population (allele ApoE4 non-carrier pts) of the AD. Besides these products, early/ mid-stage pipeline of ELN has little value to offer. Positive outcome of the multiple ongoing PhIII trials of Bapi. (data announcement in 3Q12 by PFE in ApoE4 carriers and non-carriers (NC) pts) could be a game changer. Scenario analyses suggest that ELN's share would worth of in case of positive outcome from PhIII study in ApoE4 non-carrier (ApoE4 NC) AD pts and if it fails, it would be... For detail analysis, Please read our report released on June 11, 2012 on ELN, titled "A Tale of Two: Tysabri = Support; Bapineuzumab = Upside".

Contents

COMPANIES MENTIONED

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