

Galapagos - Partnership Impact Sustainable?

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Abstracts

Though deal with Abbott has added credibility to Galapagos' GLPG0634 (PhII, an oral JAK1 inhibitor), there is still a wait of two years to see whether it has unique attributes to dominate in the crowded JAK inhibitor space! Approval and launch of oral JAK1/3 inhibitor of PFE, Tofacitinib (R, RA, PDUFA: June 28, 2012) will be the yardstick to assess the actual size of the oral RA market. While we do acknowledge that success of the PhIIb RA program by 2014 could elevate GLPG, but our analysis of the impact of catalysts for 2012-13 suggest that GLPG0634 will be commercially successful (achieve blockbuster sales) even if it gets launched by 2017, should it show significant efficacy in... For more detail, please read our report released on 6th March on GLPG titled "Partnership Impact Sustainable?"

Contents

COMPANIES MENTIONED

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