

GENZYME CVR, Positive Investment Alert, SANOFI , Market Perform - CARE MS I- Top line results supports approval

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Date: July 2011

Pages: 2

Price: US\$ 140.00 (Single User License)

ID: GA38AF72D7FEN

Abstracts

We reiterate our positive investment alert for Genzyme CVR (GZCVR), post announcement of top line results on Lemtrada (alemtuzumab, PhIII, RRMS) from the PhIII CARE- MS I study in treatment naïve multiple sclerosis population. The data may not be as impressive as reported in the PhII studies, but it does assure at the minimum that Lemtrada will win an approval and should be able to generate a minimum \$1000m in peak sales. We expect Genzyme CVR holders atleast take home \$3.5 per CVR on an NPV basis (8% cost of capital). Results from the CARE MS-II study expected in early 4Q2011 will decide Lemtrada's positioning vis-à-vis Tysabri. A positive outcome from the study should support upto 70% upside to Genzyme CVR price.

Contents

COMPANIES MENTIONED

GENZYME CVR, SANOFI

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