

Gilead - Life Cycle Management For Hiv And Hcv Pipeline = Upside

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Abstracts

MATURE BIOTECH

Subject: GILEAD – Life Cycle Management for HIV and HCV Pipeline = Upside

Abstract

3Q12 earnings (Table 1) and revised upward revenue guidance validates Gilead's (GILD) dominance in the HIV space. With the successful launch of Complera/Eviplera (truvada+edurant, 3Q12 net sales of \$99m), Stribild (L in US, R in EU, truvada+cobicistat+elvitegravir) and expected approval of Elvitegravir (R, Integrase inhibitor, 1H13), GILD is set to lead the HIV arena beyond 2018. In the next three years, GILD should be able to repeat the feat in HCV too! For more detail, please read our report released on 1st Nov., 2012, titled, "Life Cycle Management for HIV and HCV Pipeline = Upside".

Report type – Deep Dive

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