

Grifols, Ivig Opportunity In Ad - Dark Knight

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Abstracts

With a promise of stable growth in the core business, bonus upside from positive data of IVIG in AD, and an attractive risk-reward profile, Grifols SA (GRF) is our preferred choice among three IVIG/Plasma players. Acquisition of Talecris was a smart move as it enhanced GRF's market share of the plasma products as well plasma fractionation capacities which is critical in this business. With Major CapEX done with its cost saving guidance seems achievable. Positive cash flow should help GRF to strength its balance sheet and improve the EPS. Further details on the label expansion of existing products and new proteins in development are discussed in the report. Please refer our coverage initiation report released on 22nd Oct., 2012 on GRF titled, "GRIFOLS SA - IVIG Opportunity in AD - Dark Knight".

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