

# **Halozyme – “Offers Convenience Benefit but Commercial Success Uncertain”**

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## **Abstracts**

We have initiated coverage on Halozyme (HALO) after analyzing its risk reward opportunity. At first flush its technology platform appeared attractive with a broad spectrum, application potential. However, further in depth analysis of the pipeline products amidst competition paints a different picture. Biobetters, Biosimilars are some of the key threats to the products and all these are discussed in the full report. Our sum of the parts valuation suggests that the upside is limited at the current price. Any further delay in regulatory approvals could have a major negative impact.

### **Select highlights of the report:**

Herceptin SC (Herceptin + rhuPH20) may get through the regulatory hurdle but commercial opportunity?

HyQ (10% Gammgard SC + rhuPH20) – competition within.

MabThera SC - biosimilars are moving fast.

For more details, please read our report released on 27th January, 2012 on Halozyme titled “Offers Convenience Benefit but Commercial Success Uncertain”

## Contents

### COMPANIES MENTIONED

HALOZYME

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