

Infinity Pharma – ASCO ‘13 to Reinstate Faith in IPI-145!

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Abstracts

Infinity (INFI) shares down on concerns that IPI-145 (PI3K-delta, gamma isoform inhibitor, PhI/II, hematological malignancies, inflammation) may not be differentiated enough from Gilead's idelalisib (GS-1101, PI3K delta, PhIII) or other new compounds in the pipeline. The current price provides an attractive opportunity to enter the stock – i) Potential as a monotherapy in hematological malignancies and Inflammation indication, ii) Activity of IPI-145 in T-cell lymphoma could be an additional benefit over idelalisib and Pharmacocyclics' ibrutinib (PhIII, Hematological malignancies, Btk inhibitor), iii) In a PhI study, IPI-145 has shown rapid onset of clinical activity in CLL/SLL as mono therapy vs. Gilead's idelalisib which is in combination with Rituximab/bendamustine. Safety and potency could differentiate it amidst the crowd and commercially successful even as a 3rd/4th entrant, iv) High unmet need in CLL: Majority of pts are in to age >70, where current therapy has limited efficacy... For more detail, please read our report released on May 28, 2013, titled, "ASCO '13 to Reinstate Faith in IPI-145!"

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