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Abstracts

We reiterate our market perform rating for IPCA and increase price target to Rs.740 by valuing the company at 18x of FY15 earnings. We expect revenue and earnings to grow by 16 -17% in next two years (FY14 and FY15). In FY14, growth will primarily come from Institutional Anti-Malarial Business, UK and Branded Formulations (Africa, CIS). Strong US sales post approval of Indore Facility and sustained momentum in Institutional Business will be the key growth driver in FY15.

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