

Lupin - Generic Fortamet Launched At Last, However Low Competition Window Shrinks

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Abstracts

We withdraw our Positive Investment Alert (PIA) on Lupin after it re-launched generic Fortamet (\$83m of annual US sales) in the US market. We issued the PIA on 7 Feb 2012 after the Federal Circuit asked the District Court to lift the Preliminary Injunction (PI) on Lupin's generic Fortamet. While we expected Lupin to launch it soon after the ruling, Lupin waited for the Federal Circuit order putting stay on the Preliminary Injunction that came on 18 April 2012.

The launch still remains 'at-risk' as the litigation on patent validity still continues. Earlier we estimated Lupin to generate ~\$35m sales from this opportunity, however, this stands limited now.

With the news now discounted in the stock price, we withdraw our Positive Investment Alert on Lupin. Lupin's launch pipeline in FY 13 includes only one low competition and meaningful product – generic Tricor.

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