

# Lupin Loses Combivir – A Big Blow To An Already Weak FY12 Pipeline

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## Abstracts

Yesterday Teva announced its final USFDA approval for generic Combivir (Lamivudine + Zidovudine). With this approval, Teva has been granted and Lupin has been denied the 180-day exclusivity and as per Teva's settlement with GSK (innovator), Teva will launch its generic in Q4CY11. Lupin will be able to enter only after the 180-day exclusivity - at the earliest and will be competing with all other generics as well.

We reiterate our Underperform on Lupin with target price of Rs.360 on the back of (1) declining branded generic franchise in US (2) a thin US generic pipeline (3) Increasing expenses (R&D, SGA expenses) to put pressure on margins.

## Contents

### COMPANIES MENTIONED

LUPIN PHARMA, LPC

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