

LUPIN - Lupin - Loss of 2 Exclusivities Further Exposes the weak Pipeline

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Abstracts

Lupin's recent setbacks on Fortamet (branded US sales of \$83m) and LoSeasonique (branded US sales of \$28m) reflects execution issues related to the complexities involved in managing Para IVs despite having an FTF status. Most glaring is the Fortmet case, where Lupin launched the product 'at-risk' and later withdrew it after 17 days as the innovators filed for a Preliminary Injunction (PI). On 6 December 2011, the court admitted the PI on Lupin and observed that there is a likelihood of patent infringement by Lupin. In another instance, Watson launched Lo Seasonique (branded sales of \$28m) under a settlement with the innovator Teva triggering the 180-day exclusivity that is also shared by Lupin. Since the case is not settled with Lupin it cannot launch its generic version (unless 'at-risk') thereby leading to a loss of this shared 180-day exclusivity for Lupin.

These add to the pressure on the already weak US generics pipeline with launch of generic Geodon under shared exclusivity being the only meaningful upcoming product. We reiterate our Underperform with target price of Rs.360.

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