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Lupin's PARA IV Pipeline Analysis

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Abstracts

Lupin has pipeline of ~34 products having branded sales of ~$16b. Among its Para IV pipeline most lucrative opportunities are very few like that of Geodon, and Asacol. On other hand there are some Para IVs which could be very opportunistic like Combivir – a positive Citizen Petition Outcome could be a jackpot for the company. Similarly, early approval of Ambien Cr (assuming low competition), can bring substantial upside. Other Para IVs, though confirmed, are having very low upside like; Requip XL, Niaspan, Effexor XR, Clarinex, Lunesta, Namenda, Femcon and Loestrin. Though Lupin being one of the Indian company with largest number of Para IVs, yet the Para IV basket is largely comprised of products having either very small branded sales or Lupin is Non FTF in most of the cases. Thus leaving moderate upside for the company.

Contents

COMPANIES MENTIONED

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