

Outlook 2012 - Mature Biotech - Investing in Growth and Value buys!

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Abstracts

Big acquisitions in the MB sector and robust earning from majority of the companies should have pleased investors' in 2011! We expect a similar trend of acquisitions and in-licensing of better molecules in 2012 and beyond, as MB companies have robust cash flow to further leverage their balance sheet. Biogen Idec (BIIB) and Gilead (GILD) are our Top Picks for FY2012 in the Mature Biotech Sector. BIIB's focus and leadership in the MS market and positive news flow from pipeline drugs should sustain the 2011 momentum. GILD's dominance in HIV should continue with approval of better formulated HIV drugs along with diversification into HCV and establishing dominance like HIV after acquisition of Pharmasset. We also have OP recommendations on Alexion (ALXN) and Celgene (CELG) based on positive expectations from earnings and pipeline potential. In case of Amgen (AMGN), dividend and share buyback hedges the downside risk and ramp up of denosumab along with the initiative in 'Biosimilars Space' should provide the much needed boost!

Contents

COMPANIES MENTIONED

Biotech, Amgen, Gilead, Biogen Idec, Alexion, Celgene

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