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Abstracts

Q2 CY-13 Result in Line: Sales grew by 8% QoQ primarily on account of higher Absorica (Isotretinoin) sales in US. US sales grew by 29% sequentially as company now has 14% share in Isotretinoin (~\$400m market). Excluding US, revenue across the geographies remained muted and grew by 1% sequentially and 2% yoy.

EBITDA margin at 9.8%, has improved by 220 bps on sequential basis mainly due to high margin sales of Isotretinoin and INR depreciation. Forex loss of Rs.5403m and impairment of goodwill of Rs.1192m in France resulted in loss of Rs5242m at net level.

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