

RANBAXY'S PARA IV PIPELINE ANALYSIS

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Abstracts

Ranbaxy has a pipeline of ~19 Para IV challenges, of which 12 are FTF's. The total branded sales of these drugs under Para IV challenge by Ranbaxy is approximately \$25b. Most of these Para IVs/FTF's are settled, hence the 180-days exclusivity is confirmed. We assume in the event, manufacturing issues are not resolved; Ranbaxy will be able to monetize these exclusivities. In the recent past, Ranbaxy has successfully capitalized its FTF opportunities in Aricept and Valtrex despite ongoing Plant issues.

The major FTF opportunities for Ranbaxy include blockbuster drugs like Lipitor, Actos, Diovan, Provigil and Nexium. The other products for which the company has also filed Para IV are Caduet, Rapamune, Tricor, Uroxatral, Solodyn, and Antara. Among these products, Rapamune and Caduet should offer decent upside.

We expect Ranbaxy to generate a cumulative PAT of ~\$950m from these Para IV opportunities, which is approximately 23% of its current Market cap

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