

REGENERON - Riding High on the Back of Eylea...

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Abstracts

In June, REGN stock was impacted negatively (i12.5%) by the positive PhII data from Fovista (Anti-PDGF-B PEG-Aptamer, Opthotech Pvt) in combination with Lucentis in wet AMD. In our opinion, the reaction was unwarranted and we alerted investors to consider the weakness as a buying opportunity. Our optimism was based on Eylea's ability to buffer the setbacks in the pipeline. In today's 2Q12 earnings, Regeneron (REGN) reported sales of \$194m way above street expectations (our est. \$138m). With positive outcome expectations from the late-stage pipeline, we believe the favorable sales/growth trajectory to continue.

Contents

COMPANIES MENTIONED

Regeneron

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