

## **Roche, Merck - DAL-OUTCOMES study terminated - Use any weakness in the stock as an entry point**

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### **Abstracts**

Roche announced discontinuation of DAL-OUTCOME study today due to no meaningful clinical efficacy benefit. Our PT remains unchanged as we always modeled dalcetrapib as a free call option due to unpredictability of the outcome from the study. We recommend any fall in the stock price to be used as an entry point, as we see several important positive catalysts around the corner. The discontinuation of DAL-OUTCOME when viewed in conjunction with discontinuation of AIM-HIGH further aggravates the ongoing concerns on whether there is incremental benefit of HDL raising when LDL is intensively managed and whether CETP inhibition will yield benefit. The outcome raises a flag for a successful Outcome on ongoing studies - HPS-2 THRIVE (Tredpative) and REVEAL (Anacetrapib).

## Contents

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Roche, Merck

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