

TAKEDA - Multiple Challenges Blur Future!

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Abstracts

There are three major concerns for Takeda – 1) Takeda has got European exposure by the Nycomed acquisition, but as both companies are in different segments, cost synergy will be minimal and therefore does not justify the heavy acquisition price of \$13.5b. Nycomed total revenue will not be sufficient to negate revenue loss from Actos in FY 12. Moreover, no revenue addition from the Nycomed pipeline is expected. 2) Safety related issues with Actos affects market prospects of Takeda's key candidate Aloglipin's combination drug with Actos and, 3) Pipeline is full of late stage good high-risk-high-return candidates like TAK 700, LUAA21004, MLN002 and TAK 875, but no major near-term milestone expected – overall, we do not see any improvement in Takeda's business in next 2-3 years.

Contents

COMPANIES MENTIONED

TAKEDA, 4502

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