

## Vertex - INCIVEK's Life Extension by ALS-2200?

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### Abstracts

Vertex (VRTX) reported declining sales of INCIVEK (L, HCV, Protease inhibitor, PI) in 2Q12 vs. 1Q12 (down by 8% to \$328m), much below our expectations but KALYDECO (L, CF potentiator, G551D CFTR mutation) ramp-up was reassuring (up 156% to \$46m vs. 1Q12). The stock got a boost from the preliminary data of ALS-2200 (Nucleotide inhibitor, PhI/II, HCV) but safety and long term data is still critical and we continue to believe that GILD will lead and there will be many more players by the time VRTX arrives- Abbott, Bristol Myers etc. Approval of simeprevir (TMC-435, PI, QD, PhIII, Medivir/JNJ) in 2013 could further add... For more detail, please read our report released on 1st Aug, 2012, titled, "INCIVEK's Life Extension by ALS-2200?"

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