

VERTEX PHARMA - KALYDECO Uptake Balances INCIVEK Disappointment - 2012 Guidance Achievable!

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Abstracts

Vertex (VRTX) 1Q12 earnings highlighted robust KALYDECO sales (L in US, CF pts with G551D mutation), offsetting the disappointment from INCIVEK sales (L, HCV). VRTX has accelerated the pace of developing IFN-free drugs to remain in the race for better HCV drugs. PhII data from KALYDECO and VX-809 (CFTR Corrector) study that is evaluating pts with two copies of the $\Delta F508$ mutation is expected in mid '12 and VRTX also plans to begin three additional pivotal studies of KALYDECO to target CF pts with R117H mutation and in gating mutations other than G551D where CFTR proteins are present at the cell surface but do not function properly. VRTX has several other drugs in the pipeline besides its positive cash flow and this should enable it to "buy" opportunities.... For more detail, please read our report released on 1st May, 2012 on Vertex titled "KALYDECO Uptake Balances INCIVEK Disappointment - 2012 Guidance Achievable!"

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