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Abstracts

Vertex (VRTX) released positive PhII data from KALYDECO in combination with VX-809 for CF pts with delF508 mutation. Low expectations prevailed in the street for a successful combo outcome in light of the earlier PhIIa study. Earlier, we saw little risk to the profitability driven by its HCV franchise till 2014 but with today's data in the larger CF population, we expect this to sustain beyond 2014. VRTX has Cash Flow to "Buy" Opportunities, besides the existing drugs in the pipeline. INCIVEK has 70% market share in US, which is not the case in all EU countries and with a strong partner JNJ, improvements in the market share vs. Victrelis is expected..... For more detail, please read our report released on 8th May, 2012 on Vertex titled "KALYDECO + VX-809/VX-661 (CF), INCIVEK (HCV) + Pipeline –Value Loaded!"

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COMPANIES MENTIONED

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