

# Xtandi- The Real Potential and the Astellas Part!

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## Abstracts

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Expectations that Xtandi (Enzalutamide, Approved, Prostate Cancer) is going to bring a paradigm shift to treat prostate cancer as an ideal antiandrogen therapy (includes positive expectation from interim analysis of PREVAIL expected at ESMO-13/ early 4Q 2013 study in pre-chemo setting) has recently resulted in a rally in Astellas' price. Although, the clinical profile of Xtandi (steroid free regimen, better safety and efficacy than Zytiga) carries potential to compete with Casodex/Zytiga generics post 2016, we think that emerging new candidates (ARN-509, ODM-021, TAK-700) create some threat for Xtandi and the agreement between Astellas and Medivation is not lucrative enough for Astellas. Xtandi's major sales will come from metastatic pre-chemo setting due to...

Pre-chemo vs. Post chemo Market size: Metastatic Pre chemo market 3 times bigger than post chemo; Zytiga 1Q 2013 sales reveal this basis...

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