



PHARMA MONTHLY

AUGUST 2025

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Key News for the Month

Company

- Biocon sees GLP-1 weight-loss therapy as a future growth driver
- Dr. Reddy's API facility (CTO 5) in Telangana has received a VAI status and concluded the inspection
- Pfizer launches next-gen vaccine for pneumococcal disease
- Zydus Lifesciences gets USFDA approval for angina, high blood pressure drug
- Lupin launches Glucagon for Injection, 1mg/vial in the US
- Eli Lilly launches Mounjaro KwikPen for diabetes, obesity treatment in India
- The USFDA ended the inspection at Zydus' formulation manufacturing plant at Baddi with 4 observations
- Lupin ties up with Sandoz to commercialise biosimilar product
- Gland Pharma receives USFDA approval for Norepinephrine Bitartrate in 5% Dextrose Injection
- Gland Pharma receives USFDA approval for Cangrelor for Injection
- Aurobindo Pharma expects China plant to break even at Ebitda level this year
- Glenmark, Alembic Pharma, Sun Pharma recall products in US: USFDA
- Alembic gets USFDA nod for generic drug for skin condition
- Glenmark Pharmaceuticals Inc., USA to launch Micafungin for Injection, 50mg/vial and 100mg/vial (single-dose vial)
- Natco Pharma launches generic drug with 180-day exclusivity in US
- Lupin launches Bosentan Tablets for oral suspension in the US with 180-day exclusivity
- Natco Pharma sues Novo Nordisk in generic drug push
- GSK re-enters India's cancer drug market
- Welcure Drugs & Pharmaceuticals board approves bonus and stock split
- Eris Lifesciences' unit gets Brazil health regulator nod
- Dr. Reddy's expects new GST framework to address critical issues impacting pharma sector
- CuraTeQ Biologics (wholly owned step-down subsidiary of Aurobindo Pharma) receives approval for biosimilar Dazublys from UK's MHRA
- Gland Pharma receives USFDA approval for Vasopressin 5% Dextrose Injection (RTU vial)
- Zydus Saroglitazar shows positive Phase 3 results in rare liver disease PBC, US filing planned in 2026
- Aurobindo's WoS receives Form 483 with 5 observations for its API unit-I

Industry

- Substantial cancer drugs beyond ambit of current price control mechanisms: Parliamentary Panel
- IMA warns of misuse, mis-prescription of new weight-loss drugs, such as Wegovy and Mounjaro
- Pharmexcil seeks aligning GST rates on formulations, APIs
- Drug, medtech companies fear GST changes may squeeze funds

Global

- Novo Nordisk's Wegovy, Mounjaro sales in India double on month in July
- India clears Roche's 7-minute cancer injection Tecentriq for patients, with Phase IV trial condition
- Bayer and Kumquat Biosciences enter global exclusive license and collaboration in precision oncology
- AstraZeneca to seek approval for blood pressure drug by year-end

Tentative ANDA Approvals

Company	API	Strengths	Indications	Brand (Company)	Mkt Size
Gland Pharma	Vasopressin 5% Dextrose Injection	20 units per 100 mL (0.2 units per mL) RTU vial	Indicated to increase blood pressure in adults	Vasotstrict Injection (PH Health Ltd)	USD45mn (annual sales Jun'25)

Source: Media Reports and Company Press Releases

Final ANDA Approvals

Company	API	Strengths	Indications	Brand (Company)	Mkt Size
Zydus Lifesciences	Prucalopride Tablets	1/2mg	Indicated to treat chronic idiopathic constipation (CIC)	Motegrity (Takeda Pharmaceuticals Inc.)	USD186.8mn (annual sales Jun'25)
Zydus Lifesciences	Diltiazem Hydrochloride Tablets	30/60/90/120mg	Indicated for the management of chronic stable angina	Cardizem (Biovail Laboratories)	USD13.9mn (annual sales Jun'25)
Gland Pharma	Norepinephrine Bitartrate in 5% Dextrose Injection	4mg/250mL (16mcg/mL) and 8mg/250mL (32mcg/mL) single dose bags	Indicated to raise blood pressure in adult patients with severe, acute hypotension	Norepinephrine Bitartrate (Baxter Healthcare Corp.)	USD55mn (annual sales Jun'25)
Gland Pharma	Cangrelor for Injection	50mg/vial	Indicated for an adjunct to percutaneous coronary intervention (PCI)	Kengreal (Chiesi USA Inc.)	USD122mn (annual sales Jun'25)
Alembic Pharma	Tretinoin Cream	0.025%	Indicated for topical application in the treatment of acne vulgaris	Retin-A Cream (Bausch Health US, LLC.)	USD94mn
Alembic Pharma	Macitentan Tablets	10mg	Indicated for the treatment of pulmonary arterial hypertension	Opsumit Tablets (Actelion Pharmaceuticals US, Inc.)	USD1180mn
Gland Pharma	Vasopressin 5% Dextrose Injection	40 units per 100 mL (0.4 units per mL) RTU vial	Indicated to increase blood pressure in adults	Vasotstrict Injection (PH Health Ltd)	USD45mn (annual sales Jun'25)

Source: Media Reports and Company Press Releases

BSE Health Care Index Price Performance				
Companies	Price	Change		
		1 M	6 M	12 M
Aarti Drugs Ltd	470	-12.9%	33.6%	-19.6%
Abbott India Ltd	31498	-9.3%	3.4%	5.1%
Advanced Enzyme Technologies Ltd	346	-0.6%	33.2%	-21.7%
Ajanta Pharma Ltd	2479	-12.2%	-0.3%	-21.3%
Alembic Pharmaceuticals Ltd	937	-7.4%	26.0%	-10.7%
Alkem Laboratories Ltd	5302	4.5%	14.4%	-11.6%
Acutaas Chemicals Ltd	1405	20.3%	-35.2%	3.1%
Anuh Pharma Ltd	87	-11.9%	-43.3%	-56.8%
Apollo Hospitals Enterprise Ltd	7607	2.0%	25.7%	11.0%
Artemis Medicare Services Ltd	219	-7.1%	-6.3%	-17.7%
Aster DM Healthcare Ltd	601	1.7%	49.3%	49.5%
AstraZeneca Pharma India	8469	-5.4%	26.3%	26.9%
Aurobindo Pharma Ltd	1028	-11.3%	-2.9%	-34.2%
Alivus Lifesciences Ltd	945	-7.1%	6.7%	-5.9%
Bajaj Healthcare Ltd	423	-18.4%	-30.2%	8.7%
Biocon Ltd	348	-12.55%	15.1%	-2.0%
Bliss GVS Pharma Ltd	156	0.1%	25.0%	23.3%
Caplin Point Laboratories Ltd	2101	0.6%	15.28%	17.1%
Cipla Ltd	1590	1.0%	12.7%	-1.8%
Cohance Lifesciences Ltd	879	-13.1%	-27.6%	-17.3%
Dishman Carbogen Amics Ltd	264	5.2%	32.4%	31.8%
Divi's Laboratories Ltd	6118	-8.4%	11.7%	22.2%
Dr. Reddy's Laboratories Ltd	1263	-2.8%	13.0%	-9.0%
Eris Lifesciences Ltd	1800	0.5%	52.4%	34.2%
FDC Ltd	457	-6.1%	19.7%	-13.7%
Fermenta Biotech Ltd	318	-14.1%	40.9%	4.4%
Fortis Healthcare Ltd	912	7.2%	49.4%	69.2%
Gland Pharma Ltd	1867	-11.3%	20.3%	1.1%
GSK Pharmaceuticals Ltd	2783	-11.5%	12.5%	0.5%
Glenmark Pharmaceuticals Ltd	1924	-10.8%	50.5%	14.2%
Global Health Ltd	1375	3.2%	19.6%	22.4%
Granules India Ltd	492	0.3%	6.6%	-30.1%
Gufic Biosciences Ltd	366	-4.6%	11.2%	-10.6%
Gujarat Themis Biosyn Ltd	378	-3.2%	72.2%	6.9%
HealthCare Global Enterprises Ltd	673	14.5%	33.6%	76.0%
Hester Biosciences Ltd	2025	9.4%	35.0%	-14.6%
Hikal Ltd	255	-21.5%	-27.4%	-22.3%
Indoco Remedies Ltd	266	-16.3%	34.2%	-27.1%
Indraprastha Medical Corp. Ltd	439	-5.5%	22.7%	12.9%
IOL Chemicals and Pharma Ltd	91	-2.8%	-70.2%	-79.5%
IPCA Laboratories Ltd	1381	-7.3%	2.0%	1.0%
J.B.Chemicals & Pharmaceuticals Ltd	1725	-4.3%	4.8%	-12.0%
Jagsonpal Pharmaceuticals Ltd	234	-19.2%	13.4%	-41.8%
Jubilant Pharmova Sciences Ltd	1019	-11.7%	13.0%	10.7%
KMC Speciality Hospitals Ltd	69	6.5%	4.8%	-23.3%
KIMS Ltd	725	-3.3%	39.3%	47.3%
Kopran Ltd	155	-7.9%	-8.3%	-47.9%
Kovai Medical Center & Hospital Ltd	6344	3.4%	18.0%	15.4%
Krsnaa Diagnostics Ltd	786	-6.5%	10.7%	9.9%

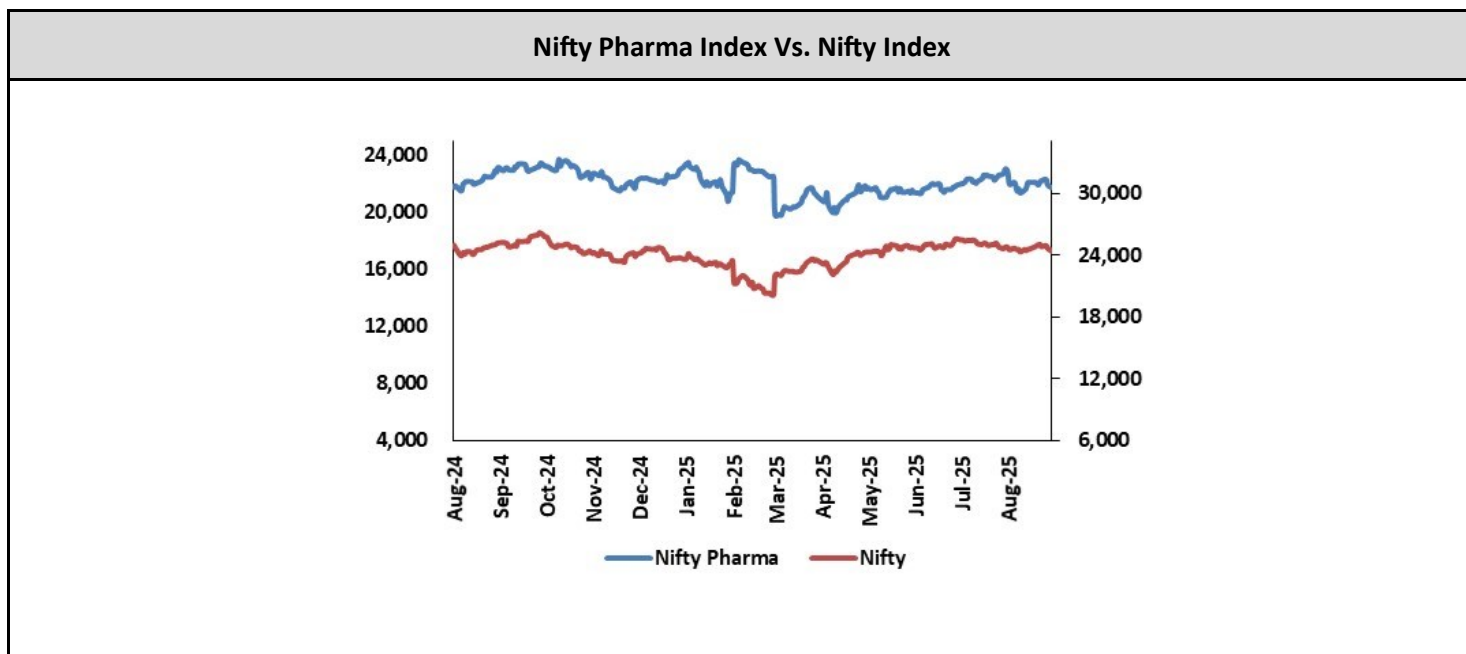
Source: BSE website; All prices are as on 29th August, 2025

BSE Health Care Index Price Performance				
Companies	Price	Change		
		1 M	6 M	12 M
Lal PathLabs Ltd	3312	9.5%	43.4%	-1.3%
Laurus Labs Ltd	856	-5.8%	62.2%	86.9%
Lincoln Pharmaceuticals Ltd	539	-0.9%	3.7%	-22.8%
Lupin Ltd	1893	-4.6%	-0.7%	-13.7%
Marksans Pharma Ltd	169	-25.8%	-17.6%	-27.9%
Max Healthcare Institute Ltd	1154	-9.4%	17.9%	33.3%
Medicamen Biotech Ltd	344	-10.3%	-32.3%	-15.2%
Metropolis Healthcare Ltd	2192	12.4%	38.2%	5.3%
Morepen Laboratories Ltd	47	-22.5%	0.6%	-39.4%
Natco Pharma Ltd	862	-10.2%	11.7%	-42.5%
Nectar Lifesciences Ltd	14	-13.1%	-45.5%	-63.7%
Neuland Laboratories Ltd	13457	-2.8%	26.7%	8.7%
NGL Fine-Chem Ltd	1409	15.7%	34.7%	-36.3%
Narayana Hrudayalaya Ltd	1752	-11.6%	21.3%	38.5%
Novartis India Ltd	924	-7.3%	15.2%	-17.0%
Nureca Ltd	236	-0.5%	-4.6%	-21.7%
Panacea Biotech Ltd	429	0.8%	43.9%	86.1%
Pfizer Ltd (India)	5152	-2.4%	27.1%	-13.6%
Piramal Pharma Ltd	184	-10.7%	-3.3%	0.6%
Procter & Gamble Health Ltd	6364	7.1%	27.5%	22.0%
Poly Medicure Ltd	2085	5.4%	2.4%	-9.4%
RPG Life Sciences Ltd	2321	3.2%	11.1%	11.0%
Rainbow Children's Medicare Ltd	1503	-1.4%	20.9%	21.3%
Sanofi India Ltd	5139	-11.7%	2.3%	-24.2%
Sastasundar Ventures Ltd	274	-6.1%	25.8%	-13.2%
Sequent Scientific Ltd	169	-4.3%	13.7%	6.1%
Shalby Ltd	195	-7.0%	3.3%	-28.4%
Shilpa Medicare Ltd	846	-5.4%	38.8%	13.0%
Sigachi Industries Ltd	31	-20.6%	-18.5%	-47.9%
SMS Pharmaceuticals Ltd	237	0.0%	23.8%	-30.6%
Solara Active Pharma Sciences Ltd	612	-5.0%	29.8%	-12.9%
SPARC Ltd	140	-8.8%	24.4%	-37.9%
Strides Pharma Science Ltd	863	-9.6%	39.0%	-34.2%
Sun Pharmaceutical Industries Ltd	1594	-6.8%	0.01%	-11.4%
Supriya Lifescience Ltd	652	-3.1%	9.0%	19.5%
Suven Life Sciences Ltd	213	-24.7%	102.0%	48.9%
Snycom Formulations (India) Ltd	17	-8.2%	9.3%	-15.9%
Syngene International Ltd	625	-12.1%	-4.1%	-26.7%
Take Solutions Ltd	10	-2.6%	9.4%	-45.5%
Tarsons Products Ltd	312	-15.2%	2.5%	-30.1%
Thyrocare Technologies Ltd	1265	-0.2%	83.7%	46.2%
Torrent Pharmaceuticals Ltd	3559	-5.6%	20.8%	3.6%
Themis Medicare Ltd	99	-12.5%	-37.4%	-61.4%
Unichem Laboratories Ltd	502	-20.3%	-17.3%	-11.2%
Venus Remedies Ltd	451	-12.0%	52.2%	29.7%
Vijaya Diagnostic Centre Ltd	1007	-10.1%	9.9%	12.9%
Vimta Labs Ltd	666	-6.4%	-23.0%	3.8%
Windlas Biotech Ltd	996	-0.7%	30.8%	22.4%
Wockhardt Ltd	1428	-15.9%	23.2%	42.9%
Zydus Lifesciences Ltd	981	-1.4%	11.9%	-13.4%

Source: BSE website; All prices are as on 29th August, 2025

NIFTY PHARMA COMPANIES					
Company	Price (Rs)	Mcap (Rs mn)	Change		
			1 M	6 M	12 M
Abbott India Ltd.	31498	669304	-9.3%	3.4%	5.1%
Alkem Laboratories Ltd	5302	633987	4.5%	14.4%	-11.6%
Aurobindo Pharma Ltd	1028	596890	-11.3%	-2.9%	-34.2%
Ajanta Pharma Ltd	2479	309651	-12.2%	-0.3%	-21.3%
Biocon Ltd	348	465664	-12.6%	15.1%	-2.0%
Cipla Ltd	1590	1284111	1.0%	12.7%	-1.8%
Divi's Laboratories Ltd	6118	1624230	-8.4%	11.7%	22.2%
Dr. Reddy's Laboratories Ltd	1263	1054077	-2.8%	13.0%	-9.0%
Gland Pharma Ltd	1867	307600	-11.3%	20.3%	1.1%
Glenmark Pharmaceuticals Ltd	1924	543025	-10.8%	50.5%	14.2%
Granules India Ltd	492	119319	0.3%	6.6%	-30.1%
Ipca Laboratories Ltd	1381	350340	-7.3%	2.0%	1.0%
J.B. Chemicals & Pharmaceuticals Ltd	1725	269202	-4.3%	4.8%	-12.0%
Laurus Labs Ltd	856	462279	-5.8%	62.2%	86.9%
Lupin Ltd	1893	864609	-4.6%	-0.7%	-13.7%
Mankind Pharma Ltd	2290	945169	-6.9%	-5.7%	11.6%
Natco Pharma Ltd	862	154321	-10.2%	11.7%	-42.5%
Sun Pharmaceutical Industries Ltd	1594	3824660	-6.8%	0.01%	-11.4%
Torrent Pharmaceuticals Ltd	3559	1204477	-5.6%	20.8%	3.6%
Zydus Lifesciences Ltd	981	986965	-1.4%	11.9%	-13.4%

Source: NSE website, Company Research; All prices are as on 29th August, 2025



Source: NSE website

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