



PHARMA MONTHLY

AUGUST 2022

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Key News for the Month

Company

- Bharat Biotech expects regulator's nod for intranasal Covid-19 vaccine in August
- Aurobindo Pharma received Form 483 with 3 observations for Unit XI
- Dr. Reddy's gearing up to get substantial slice of Revlimid generic opportunity in US
- Covaxin booster dose approved by Japan, says Bharat Biotech
- Eris Lifesciences enters licensing deal with Biocon for insulin glargine
- Intas & Dr. Reddy's in race with PEs to buy US' Athenex
- USFDA completes inspection at Unit VII for Aurobindo Pharma
- Zydus Lifesciences received 4 Form 483 observations for its Moraiya facility
- Cipla betting big on digitisation and emerging segments
- Apollo Hospitals acquires asset from Nayati Healthcare for Rs450cr
- BioNTech expects Omicron-adapted vaccine deliveries as soon as October
- Dr. Reddy's gearing up to get substantial slice of Revlimid generic opportunity in US
- 100 million doses of Corbevax supplied to Centre: Biological E Ltd
- Sun Pharma slides as USFDA finds issues with Mohali plant labs and procedures
- Indoco Remedies to acquire stake in Kanakal Wind Energy
- Cipla board appoints Ashish Adukia as global CFO
- Dolo 650 maker says Rs1,000cr 'freebies' are total expenditure over several years
- Glenmark, Strides Pharma, Cipla recall products in the US
- Cipla chief says Indian healthcare market will ride high on wellness wave
- USFDA marks Glenmark Pharma North Carolina Facility's inspection as 'Official Action Indicated'
- Novartis announces intention to separate Sandoz business to create standalone company
- Respiratory vaccine duel sees Pfizer come short of GSK – possibly
- Dr. Reddy's unit gets EIR from USFDA
- USFDA conducts pre-market inspection at Gland Pharma's Dundigal facility
- Lupin announces UKMHRA approval of Lutio for treatment of COPD

Industry

- Indian pharma market grew 14.1% in July, AIOCD report
- Indian companies eye new trade channels in US amid erosion of generic prices
- Price rise, growth in sales of non-Covid drugs to boost Indian pharma market

Global

- Pfizer to acquire Global Blood Therapeutics for USD5.4bn to enhance presence in rare hematology
- Cerevance establishes strategic research collaboration with Merck
- Medison Pharma announces the expansion of its partnership with Albireo to a multi-regional agreement to commercialize Odevixibat in Canada and Israel

Tentative ANDA Approvals

Company	API	Strengths	Indications	Brand (Company)	Mkt Size
Natco Pharma	Trabectedin	1mg/vial	antitumor chemotherapy	Janssen Biotech	USD49.7mn

Source: Media Reports and Company Press Releases

Final ANDA Approvals

Company	API	Strengths	Indications	Brand (Company)	Mkt Size
Alembic Pharma	Adapalene and Benzoyl Peroxide Topical Gel	0.3%/2.5%	Topical treatment of acne vulgaris in adults & pediatric patients 12 years and older	Epiduo Forte Topical Gel (Galderma Laboratories)	USD211mn
Zydus Lifesciences	Empagliflozin Tablets	10/25mg	Used to lower blood sugar levels in type 2 diabetes	Jardiance (Eli Lilly)	USD9810mn (June'22)
Zydus Lifesciences	Ivermectin Cream	1%	Treatment of inflammatory lesions of rosacea	Soolantra (Galderma)	USD176mn (June 2022)
Zydus Lifesciences	Prochlorperazine Maleate Tablets	5/10mg	Treat nervous & mental conditions and non-psychotic anxiety	Compazine (Smithkline)	USD30mn (June 2022)
Aurobindo Pharma	Vasopressin Injection USP	20 Units/mL Multiple-Dose Vials	Treatment of Cardiovascular agent: vasoconstrictor	Par Pharma (Vasostrict)	USD660mn (June 2022)
Lupin	Rufinamide tabs	100/200/400mg	Treatment of seizures	Banzel (Eisai)	USD164mn
Strides Pharma	Naproxen Sodium OTC	220mg	Nonsteroidal anti-inflammatory drug	Naprosyn/Aleve (Bayer)	USD100mn
Unichem	Carbamazepine	200mg	Anticonvulsant drug	Tegretol (Novartis)	-
Aurobindo Pharma	Medroxy-progesterone Acetate Injectable	150 mg/mL, 1 mL Single Dose Vial	Use to prevent pregnancy	Depo-Provera (Pfizer)	USD62mn
Lupin	Formoterol Fumarate Inhalation Solution	20 mcg/2 mL per Unit-Dose Vial	Control chronic lung diseases	Perforomist (Mylan)	USD282mn
Granules India	Guaifenesin and Pseudoephedrine Hydrochloride ER	600 mg/60 mg and 1200 mg/120 mg	Expectorant	Mucinex D (Reckitt)	USD71mn
Alembic Pharma	Chlorthalidone Tablets	25/50mg	Oral Diuretic	Hygroton Tablets (Sanofi)	USD37mn
Granules India	Loperamide Hydrochloride and Simethicone	2 mg/125 mg	Relieve symptoms of diarrhea	Imodium (Johnson & Johnson Consumer)	USD60mn

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	432	3.3%	-5.3%	-29.0%
Abbott India Ltd	18753	-6.3%	6.9%	-1.7%
Ajanta Pharma Ltd	1369	7.1%	18.8%	-7.8%
Albert David Ltd	543	-5.0%	4.7%	-6.8%
Alembic Ltd	74	4.8%	-17.4%	-29.6%
Alkem Laboratories Ltd	2976	-7.6%	-9.2%	-23.8%
Ami Organics Ltd	993	-4.4%	8.4%	-
Anuh Pharma Ltd	92	-4.4%	-4.9%	-23.8%
Alembic Pharmaceuticals Ltd	648	-7.6%	-10.7%	-13.7%
Apollo Hospitals Enterprise Ltd	4316	2.5%	-10.1%	-9.2%
Aster DM Healthcare Ltd	221	-6.9%	29.2%	3.3%
AstraZeneca Pharma India	3068	0.2%	17.6%	-1.4%
Aurobindo Pharma Ltd	545	-0.3%	-12.8%	-23.9%
Bajaj Healthcare Ltd	358	-8.4%	-7.6%	-59.1%
Biocon Ltd	310	0.8%	-11.3%	-13.2%
Bliss GVS Pharma Ltd	78	0.8%	7.2%	-30.7%
Caplin Point Laboratories Ltd	778	0.1%	16.60%	6.2%
Cipla Ltd/India	1039	6.2%	12.3%	11.1%
Dishman Carbogen Amics Ltd	118	-6.7%	-29.0%	-37.2%
Divi's Laboratories Ltd	3625	-5.3%	-14.9%	-29.0%
Dr. Reddy's Laboratories Ltd	4245	3.8%	4.5%	-9.3%
Eris Lifesciences Ltd	691	1.9%	2.1%	-5.2%
FDC Ltd	263	3.9%	-2.6%	-24.4%
Fermenta Biotech Ltd	180	-5.6%	-26.1%	-37.0%
Fortis Healthcare Ltd	294	5.8%	20.0%	3.0%
Gland Pharma Ltd	2368	4.6%	-27.4%	-39.2%
GSK Pharmaceuticals Ltd	1459	3.7%	-4.0%	-4.2%
Glenmark Pharmaceuticals Ltd	371	-2.5%	-17.3%	-29.7%
Glenmark Lifesciences Ltd	440	-6.9%	-4.1%	-36.3%
Granules India Ltd	306	2.3%	5.4%	-7.8%
Gufic Biosciences Ltd	211	3.2%	3.7%	13.1%
Gujarat Themis Biosyn Ltd	518	-2.4%	53.8%	21.5%
HealthCare Global Enterprises Ltd	273	1.5%	19.7%	18.8%
Hester Biosciences Ltd	2116	-4.4%	-3.4%	-11.2%
Hikal Ltd	343	36.5%	-6.4%	-47.0%
Indoco Remedies Ltd	359	-7.0%	-8.3%	-22.9%
Indraprastha Medical Corp. Ltd	70	18.5%	5.8%	-6.9%
IND-Swift Laboratories Ltd	60	0.8%	-13.4%	-10.8%
IOL Chemicals and Pharma Ltd	361	1.3%	2.7%	-35.1%
IPCA Laboratories Ltd	905	-9.4%	-7.7%	-27.0%
J.B.Chemicals & Pharmaceuticals Ltd	1774	0.3%	9.7%	4.3%
Jubilant Life Sciences Ltd	350	-3.1%	-11.8%	-45.6%
KIMS Ltd	1203	-3.6%	-5.2%	-6.4%
Kopran Ltd	186	-7.4%	-31.9%	-13.0%
Kovai Medical Center & Hospital Ltd	1491	-0.7%	-3.5%	-10.6%
Krsnaa Diagnostics Ltd	481	-10.3%	-16.7%	-49.5%
Lal PathLabs Ltd	2567	11.5%	1.9%	-35.3%
Lasa Supergenerics Ltd	35	-11.4%	-19.1%	-55.4%

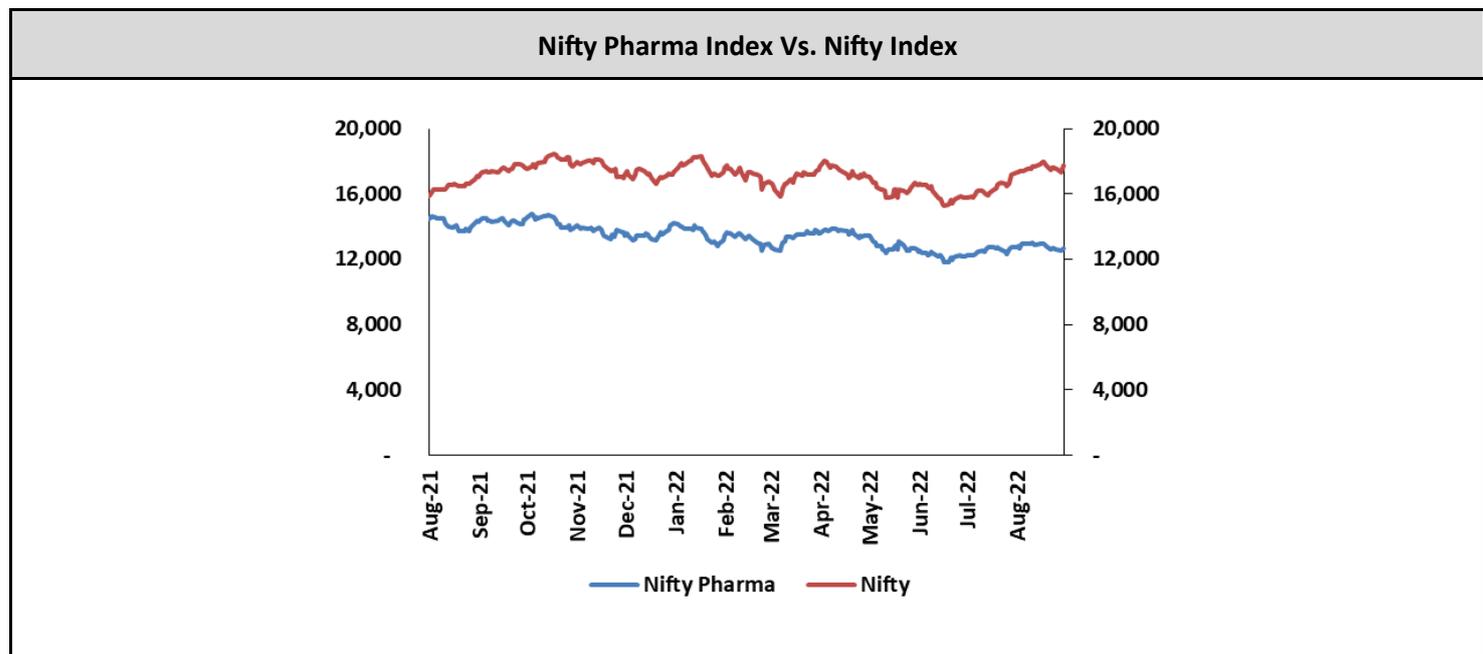
Source: BSE website; All prices are as on 30st Aug, 2022

BSE Health Care Index Price Performance				
Companies	Price	Change		
		1 M	6 M	12 M
Laurus Labs Ltd	579	10.7%	15.1%	-10.9%
Lincoln Pharmaceuticals Ltd	288	-4.6%	-5.4%	-14.8%
Lupin Ltd	669	3.8%	-10.3%	-29.8%
Marksans Pharma Ltd	52	7.1%	10.9%	-28.6%
Max Healthcare Institute Ltd	388	4.9%	3.8%	0.7%
Medicamen Biotech Ltd	1174	50.1%	76.0%	79.5%
Metropolis Healthcare Ltd	1436	-9.2%	-26.5%	-53.4%
Morepen Laboratories Ltd	34	-4.4%	-98.8%	-35.0%
Natco Pharma Ltd	616	-9.8%	-29.1%	-34.9%
Nectar Lifesciences Ltd	23	-4.0%	-14.7%	-26.6%
Neuland Laboratories Ltd	1269	-1.9%	20.1%	-24.5%
NGL Fine-Chem Ltd	1592	-8.1%	-24.6%	-46.4%
Narayana Hrudayalaya Ltd	701	6.3%	2.3%	32.1%
Novartis India Ltd	731	1.1%	16.2%	-6.3%
Nureca Ltd	998	-4.1%	-27.7%	-40.7%
Panacea Biotech Ltd	137	6.5%	-27.6%	-53.8%
Pfizer Ltd (India)	4183	-0.1%	-5.0%	-27.0%
Procter & Gamble Health Ltd	4207	-5.4%	-8.1%	-23.4%
Poly Medicure Ltd	852	16.7%	7.0%	-9.3%
RPG Life Sciences Ltd	725	19.8%	46.4%	44.7%
Sanofi India Ltd	6189	-2.3%	-14.8%	-29.8%
Sastasundar Ventures Ltd	350	16.4%	-9.9%	18.5%
Sequent Scientific Ltd	114	-11.3%	-15.5%	-51.2%
Shalby Ltd	126	9.3%	0.9%	-34.7%
Shilpa Medicare Ltd	393	-4.7%	-3.3%	-31.5%
Sigachi Industries Ltd	292	18.0%	-3.1%	-
SMS Pharmaceuticals Ltd	81	-6.3%	-17.7%	-53.0%
Solara Active Pharma Sciences Ltd	451	16.7%	-34.1%	-71.9%
SPARC Ltd	230	0.0%	-14.4%	-23.3%
Strides Pharma Science Ltd	331	-0.1%	3.4%	-45.6%
Sun Pharmaceutical Industries Ltd	893	-5.3%	5.9%	13.6%
Supriya Lifescience Ltd	355	-6.7%	-15.1%	-
Suven Life Sciences Ltd	73	1.4%	-7.9%	-12.7%
Suven Pharmaceuticals Ltd	490	3.5%	-4.5%	-8.4%
Snycom Formulations (India) Ltd	9	-5.5%	-7.6%	42.5%
Syngene International Ltd	601	5.9%	10.7%	-4.7%
Take Solutions Ltd	26	4.9%	-10.5%	-50.7%
Tarsons Products Ltd	768	28.4%	9.1%	-
Thyrocare Technologies Ltd	619	-3.3%	44.5%	-49.5%
Torrent Pharmaceuticals Ltd	1552	1.5%	12.6%	0.4%
TTK Healthcare Ltd	860	1.4%	26.9%	23.0%
Unichem Laboratories Ltd	306	2.9%	21.1%	4.9%
Venus Remedies Ltd	219	-7.1%	-24.3%	-54.4%
Vijaya Diagnostic Centre Ltd	356	-1.9%	-15.7%	-
Vimta Labs Ltd	374	-4.0%	17.3%	24.8%
Windlas Biotech Ltd	224	-0.5%	-7.8%	-42.8%
Wockhardt Ltd	241	9.0%	-29.0%	-40.8%
Zydus Lifesciences Ltd	378	9.2%	4.9%	-31.9%

Source: BSE website; All prices are as on 30th Aug, 2022

NIFTY PHARMA COMPANIES					
Company	Price (Rs)	Mcap (Rs mn)	Change		
			1 M	6 M	12 M
Abbott India Ltd	18753	398479	-6.3%	6.9%	-1.7%
Alkem Laboratories Ltd	2976	355766	-7.6%	-9.2%	-23.8%
Alembic Pharmaceuticals Ltd	648	127393	-7.6%	-10.7%	-13.7%
Aurobindo Pharma Ltd	545	319483	-0.3%	-12.8%	-23.9%
Biocon Ltd	310	371766	0.8%	-11.3%	-13.2%
Cipla Ltd	1039	833423	6.2%	12.3%	11.1%
Divi's Laboratories Ltd	3625	962324	-5.3%	-14.9%	-29.0%
Dr. Reddy's Laboratories Ltd	4245	633235	3.8%	4.5%	-9.3%
Gland Pharma Ltd	2368	389905	4.6%	-27.4%	-39.2%
Glenmark Pharmaceuticals Ltd	371	104769	-2.5%	-17.3%	-29.7%
Granules India Ltd	306	75939	2.3%	5.4%	-7.8%
Ipca Laboratories Ltd	905	229678	-9.4%	-7.7%	-27.0%
Laurus Labs Ltd	579	310997	10.7%	15.1%	-10.9%
Lupin Ltd	669	304189	3.8%	-10.3%	-29.8%
Natco Pharma Ltd	616	112419	-9.8%	-29.1%	-34.9%
Pfizer Ltd	4183	191356	-0.1%	-5.0%	-27.0%
Strides Pharma Science Ltd	331	29716	-0.1%	3.4%	-45.6%
Sun Pharmaceutical Industries Ltd	893	2143206	-5.3%	5.9%	13.6%
Torrent Pharmaceuticals Ltd	1552	525403	1.5%	12.6%	0.4%
Zydus Lifesciences Ltd	378	387026	9.2%	4.9%	-31.9%

Source: NSE website, Company Research; All prices are as on 30th Aug, 2022



Source: NSE website

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