
Egetis Therapeutics - An Attractive Late-Stage Orphan Drug Play

Redeye raises its base case for Egetis by almost 60 percent after a closer look at the project pipeline following the merger with Rare Thyroid Therapeutics (RTT). In our view, the current valuation does not fully reflect the transformation into a late-stage orphan drug developer or the quality of the portfolio. We see a high likelihood that flagship project Emcitate could become the first approved treatment for MCT8 deficiency, an ultra-rare severe thyroid hormone disorder, and a potential USD 1bn+ market.

Read more and download the Research Update.

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Attachments

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