
Calliditas ahead of Q1 - Patient enrollment is the lead indicator at this stage

Calliditas entered 2024 with a strong Tarpeyo patient enrollment. With the support from the new label, we expect another strong performance in Q1, and at this stage of the full expanded launch, we view patient enrollment as the lead indication. We expect Calliditas to take a more proactive approach to the 2024 guide as the launch progresses, with added Tarpeyo support from upgraded formulary listing status, the OLE study and the KDIGO revision later in 2024. Our base case valuation is SEK 270 (270), a Bull Case of SEK 390 (390) and a Bear Case of SEK 70 (70).

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Attachments

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