

Xspray Pharma: HyNap-Dasa, a no-brainer for BMS?

We have delved deeper in historical patent litigations with focus on amorphous vs crystalline candidates, and highlight a recent case which ended in a settlement between the generic and original company. These findings reinforce our belief that a deal could be reached shortly after the study data. Thus, we revalue our estimates, which leads to higher valuations.

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Attachments

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