



## Syndicated Thought Leader Insight

---

### ***Thought Leader Insight & Analysis Report*** **Psoriasis Q3 2010**

<b>Therapeutic Class:</b>	Autoimmune Disorders
<b>Focus Area:</b>	Psoriasis, Psoriatic Arthritis
<b>Specialty/Location:</b>	Dermatologists /N. America, Europe
<b>Number of Interviews:</b>	6
<b>Number of Pages:</b>	120
<b>Publication Date:</b>	August 2010
<b>Principal Authors:</b>	Kim Grant Tricia L. Hanlon Jeffrey D. Berk, Ph.D., MBA
<b>Product Code:</b>	MAIPQ309-18
<b>Pricing:</b>	\$7,000
<b>Order Info:</b>	www.medpredict.com or call (513) 271-1924

**Summary:** This report, the 18<sup>th</sup> in our Psoriasis series, includes the insights from six internationally recognized psoriasis experts (US - 3, Europe - 3 [Switzerland - 1, Germany - 1, and France - 1]). For this report the panelists offered their insight into the following classes of therapeutics for psoriasis and/or psoriatic arthritis (PsA):

- Antimetabolites,
- CD-2, CD-4, CD8, CD-11,
- IL-6, IL-12, IL-17, IL-20, IL-22, IL-23,
- JAK,
- p38,
- protein kinase C,
- S1P,
- TNF, and
- TLR-9.

Our panel addresses the following questions in this report:

- Will cardiovascular warning signals with J&J's Stelara lead to an IL-23 class "black box" warning restricting use in patients with cardiovascular risk factors?
- What is the status of Novartis' AIN-457 clinical program?
- What is the outlook for Roche's Actemra and BMS' ALD-518 in PsA?

- How will Abbott capitalize on the BELIEVE trial results to gain share for Humira vs. Amgen/Pfizer's Enbrel?
- What is the status of Pfizer's oral tasocitnib program in psoriasis and PsA? How will it stack up against Lilly's JAK, INCB-28050?
- Should/will methotrexate retain its "standard of care" position in light of additional new data showing lower response rates than newer options?
- What are the key data to be presented at EADV 2010?
- And much more.

To produce this report, MedPredict conducted six primary interviews with global, peer-recognized dermatology Thought Leaders during August 2010. Full transcripts of these interviews are included with the report.

**Drugs and Companies mentioned in this report include:**

<b>Company</b>	<b>Generic Name or Mechanism</b>	<b>Brand Name(s)</b>
Abbott (Eisai)	adalimumab briakinumab; ABT-874	Humira (with Eisai)
Allostera / Unigene	APG2305	
Amgen	AMG-827	
Amgen / Pfizer / Wyeth	etanercept	Enbrel
AnaptysBio / VLST	somatic hypermutation anti-IL17	
Astellas / Biogen	alefacept	Amevive
Biotest	BT-061	
Bristol-Myers Squibb	BMS-582949	
Bristol-Myers Squibb / Alder	ALD-518	
Cephalon / Arana	ART-621	
generic	methotrexate	
Genmab	zanolimumab	HuMax-CD4
Idera	IMO-3100	
J&J / Centocor / Schering-Plough / Essex	ustekinumab; CNTO-1275 IL22	Stelara
Leo	LEO-22811	
Lilly	LY2439821 LY-2127399 LY2525623 INCB-28050 LY-3009104	
Merck Serono / Genentech	efalizumab	Raptiva
Merck	anti-IL-17 IL22 dual p40 / p19 MAb (IL23)	
Novartis	AIN-457 NVP-AEB-071	
NovImmune / Genentech	NI-1401	
Novo Nordisk	NN8226	
Pfizer	tasocitinib; CP-690550 IL22	
Roche / Chugai	tocilizumab	Actemra / RoActemra
Roche / Actelion	R3477 / ACT-128800	
Sanofi-Aventis / Regeneron	SAR153191 / REGN-88	
UCB	certolizumab CDP-6038	Cimzia
Vascular Biogenics	VB-201	
Vertex	VX-509	

## Table of Contents

Executive Summary .....	4
Top Ten Highlights.....	6
Key Findings .....	15
Angiogenesis .....	15
Antimetabolite .....	15
methotrexate.....	16
CD2 .....	17
Amevive (alefacept; Astellas / Biogen) .....	17
CD-4 .....	18
BT-061 (Biotest).....	18
HuMax-CD4 (zanolimumab; Genmab) .....	19
CD-8 (BAFF / BLyS) .....	20
LY2127399 (Lilly) .....	20
CD11 .....	21
Raptiva (efalizumab; Genentech / Merck Serono).....	21
IL-6 .....	22
Actemra (tocilizumab; Roche / Chugai) .....	22
ALD-518 (Alder / BMS) .....	27
SAR153191 / REGN-88 (Sanofi-Aventis / Regeneron).....	31
CDP-6038 (UCB) .....	32
IL-12 .....	32
VB-201 (Vascular Biogenics) .....	32
IL-17 .....	33
AMG-827 (Amgen).....	33
AIN-457 (Novartis) .....	37
LY2439821 (Lilly) .....	39
Anti-IL-17 (Schering-Plough / Merck) .....	39
somatic hypermutation anti-IL17 (AnaptysBio / VLST) .....	39
NI-1401 (Genentech / NovImmune) .....	40
IL-20 .....	40
NN-8226 (Novo Nordisk).....	40
IL-22 .....	40
anti-IL22 MAb (Pfizer / Wyeth); (Centocor / Merck / Schering-Plough) .....	40
IL-22 antibody (Merck) .....	42
IL-23 .....	42
Stelara (ustekinumab; CNTO-1275; Centocor; Janssen-Cilag; Schering-Plough; Essex).....	42
briakinumab (ABT-874; Abbott).....	48
dual p40 / p19 MAb (IL-23 selective MAb; Merck / Schering-Plough) .....	52
LY2525623 (Lilly) .....	54
APG2305 (Allosteria / Unigene) .....	54
JAK Inhibitors .....	55
tasocitinib (CP-690550; Pfizer).....	55
INCB-28050, LY-3009104 (Lilly) .....	62
VX-509 (Vertex) .....	63
p38 .....	63
BMS-582949 (Bristol-Myers Squibb) .....	63
LEO-22811 (Leo) .....	64

PKC .....	65
NVP-AEB-071 (Novartis).....	65
S1P.....	66
R3477 (a.k.a. ACT-128800; Roche / Actelion) .....	66
TNF .....	67
Humira (adalimumab; Abbott) .....	67
Enbrel (etanercept; Amgen/Wyeth) .....	69
Cimzia (certolizumab; UCB) .....	70
ART-621 (Cephalon / Arana).....	70
Toll-Like Receptor 9 .....	71
IMO-3100 (Idera) .....	71
Thought-Leader Discussions.....	72
Interview OHIID02459.....	72
Interview OHIID02460.....	81
Interview OHIID02461.....	90
Interview OHIID02463.....	99
Interview OHIID02464.....	106
Interview OHIID02465.....	114