

Minding the corporate checkbook - a managers guide to executing successful business investments

Financial Times/Prentice Hall - How Venture Capital Works

Recommendation  Jazz Pharmaceuticals	<p>We recommend shorting Jazz Pharmaceuticals (JAZZ) because it is overvalued by 53-70%, and its price could decline significantly in the next 6-12 months.</p> <p>Investment Thesis: The market has incorrectly assumed an FY23 earnings year for Xyrem generics vs. more reasonable estimates of FY 20-21, and it has assumed unreasonable pricing power and peak sales figures for Vyvios and ZP-110.</p> <p>Value: The company's intrinsic value is closer to \$90-120/share, and even if we're wrong about all these factors, the company is appropriately valued right now at \$147/share.</p> <p>Catalysts: In the next 6-12 months include more Xyrem generics winning FDA approval, a slowdown in price increases, and early sales results from Vyvios.</p> <p>Risks: Risks include a later-than-expected entrance for Xyrem generics, sub-performance from Vyvios and ZP-110, and pending clinical data and revenue sales from early-stage drugs like ZP-239 and ZP-301.</p> <p>We can mitigate these risks by purchasing call options at \$170-\$190 exercise prices. (In limit losses to 15-20%), shorting Xyrem generic companies, or by buying a broader biotech/pharma index fund or ETF.</p>
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Description: -

Success in business.

Risk management.

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Notes: Includes bibliographical references (p. 235-238) and index.

This edition was published in 2004



Filesize: 60.82 MB

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How Venture Capital Works

A good piece of advice to investors is to start with simple investments, then incrementally expand their portfolios.

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As a result, they build a strategy that is not grounded in the competitive, customer, and cultural realities. Because you are risk-averse and a wealth preserver, you would be affected far more by large losses that can result from high-risk, high-return investments. A plan not followed is ineffective.

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