SanaCurrents

Eidos Therapeutics (NASDAQ:EIDX)

November 6, 2018

SUMMARY

4Q Catalyst: AG10 phase II data

Based on its analytics score, SanaCurrents gives a **superior sentiment** rating that Eidos Therapeutics (EIDX) will report positive topline data by for the company's phase II trial of its lead heart disease drug, AG10. Eidos is expected to announce the data in mid-November. The phase II study will evaluate 45 patients with transthyretin amyloidosis (ATTR) cardiomyopathy.

People who inherit ATTR cardiomyopathy, which afflicts approximately 240,000 patients worldwide, produce a mutated version of the protein transthyretin (TTR). Healthy TTR normally helps transport vitamin A around the body but the mutant version results in misfolded clumps of the protein, leading to pain, organ failure (in the heart, liver and nerves) and early death. There is no approved treatment for the disease. EIDX's oral, small molecule AG10 offers a safe and promising benefit to patients, and a potential high return for early investors.

In the trial, EIDX will assess AG10 in two distinct forms of ATTR cardiomyopathy – wild type and mutant – and seek to affirm AG10 can stabilize TTR. EIDX and researchers believe stabilizing the TTR protein can correct the misfolding and prevent progression of the disease. ATTR cardiomyopathy strikes people in their 50s; most only live 3-5 years after diagnosis.

With the ability to test in two defined patient groups and a key endpoint of TTR stabilization already validated in earlier studies, EIDX has clear path to positive phase II results in December. Investors have rewarded strong phase II results in rare, inherited diseases such ATTR cardiomyopathy and the design of the EIDX trial mirrors previous successes.

After pricing in June 2018, EIDX shares have traded between $20-24 for approximately three months. EIDX shares slumped to $9 to $13 per share range between August and October following ATTR announcements by Alnylam (ALNY), Pfizer (PFE) and Ionis (IONS)/Akcea (AKCA).

In the second quarter of 2018, three SanaCurrents companies reported phase II results. The pivotal or superior sentiment ratings assigned to drugs in development by the three companies were issued 21 to 60 days prior to the data announcement. Following the phase II announcements, the three stocks increased 77%, 79% and 88%, respectively.

THE EDGE

EIDX is one of several companies backed by BridgeBio, a 3-year-old consortium of biotech executives seeking to advance drugs in niche diseases. BridgeBio has licensed drugs from large drug companies but also has brought in new compounds out of universities, such as AG 10.

Significantly, several BridgeBio executives previously worked at MyoCardia (MYOK) where they helped develop the MYOK's mavacamten, another drug designed to treat an inherited cardiomyopathy.

PROBABILITY SENTIMENT

Superior

Key Catalyst(s)

Phase II data from AG 10 to treat ATTR cardiomyopathy

Key Catalyst Dates

- Mid-November 2018

Select Statistics

Market

Estimated Market Size by 2025: $6B by 2025

Insider & Institutional Holdings

66.66% - % of Shares Held by All Insider

23.27% - % of Shares Held by Institutions

69.81% - % of Float Held by Institutions

47 - Number of Institutions Holding Shares

Location

101 Montgomery Street

Suite 2550

San Francisco, CA 94101

United States

Executives

Dr. Neil Kumar, CEO & Director

Dr. Jonathan C. Fox FACC, M.D., Ph.D., Pres & Chief Medical Officer

Ms. Christine E. Siu, Chief Financial Officer

Dr. Uma Sinha, Chief Scientific Officer

Website

http://www.eidostx.com

Eidos Therapeutics (EIDX) Probability Sentiment

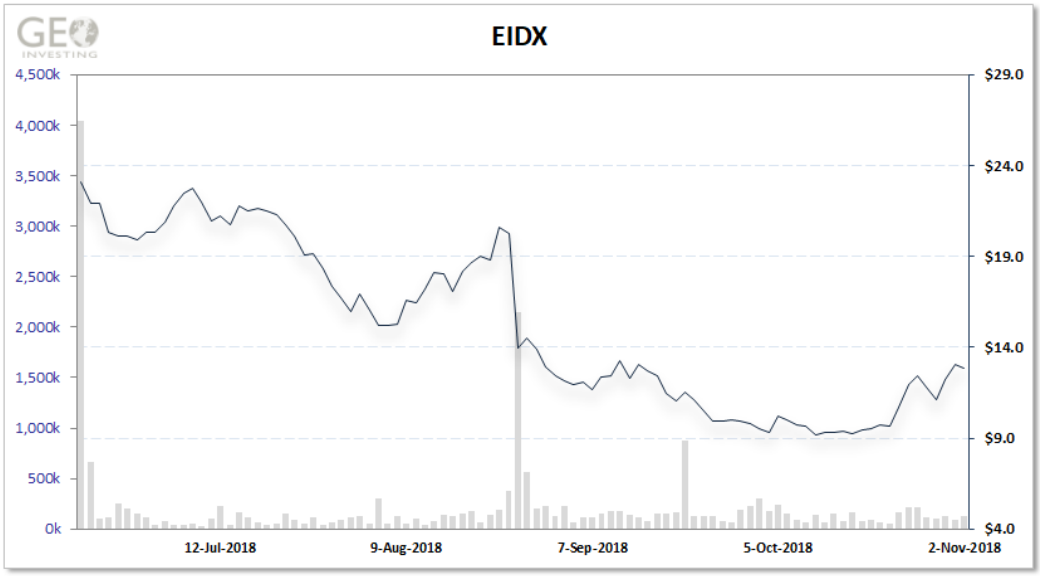
MYOK shares approximately doubled from its day-earlier close after reporting phase II results on August 9, 2017.

The AG 10 compound targets patients with ATTR *cardiomyopathy*. The December phase II trial does ***not*** attempt to treat ATTR patients experiencing Familial Amyloidotic *Polyneuropathy* (FAP), a patient group expected to be treated with Alnylam's patisiran and Ionis/Akcea's inotersen. The FDA approved patisiran in August 2018 and inotersen two months later.

Pfizer also is testing Vyndaquel (tafamidis) in phase III studies to treat ATTR cardiomyopathy; the Pfizer drug is approved in Europe and Japan as a treatment for neuropathy and recorded $89 million in sales in 2015. The FDA, however, previously turned away Vyndaquel twice as a treatment for (FAP). Pfizer reported in March 2018 that Vyndaquel demonstrated a statistically significant reduction in the combination of all-cause mortality and frequency of cardiovascular-related hospitalizations at month 30 compared to placebo.

Though Pfizer may be able to push Vyndaquel to physicians as a treatment for ATTR cardiomyopathy prior to the entry of AG 10 in the market, AG 10 retains the long-term clinical edge. AG 10 attempts to correct the protein misfolding *prior* to the progression of the disease, instead of Vyndaquel's broad effort to reduce all-cause mortality and cardiovascular-related hospitalizations. The phase II trial results should demonstrate the superiority of the AG 10 approach in treating ATTR cardiomyopathy.

EIDX expects to initiate a pivotal, phase III trial for AG10 in ATTR cardiomyopathy if the December results are positive.



Eidos Therapeutics, Inc. (EIDX) data provided by Sentieo

Eidos Therapeutics, Inc. is a clinical stage biopharmaceutical company. The Company is focused on addressing the unmet need in diseases caused by transthyretin (TTR), amyloidosis (ATTR). It focuses on treating the disease by targeting them at their collective source by stabilizing TTR. The Company's product candidate, AG10, is an orally-administered small molecule designed to potently stabilize tetrameric TTR, thereby halting at its outset the series of molecular events that give rise to ATTR. AG10 binds and stabilizes TTR in the blood, preventing the formation of amyloid and halting progression of the disease.

GICS Sector	Biotechnology
GICS Industry	Health Care
Next FQ/FH End Date	09/30/2018
Next FY End Date	12/31/2018
Next Earnings Date	11/06/2018
Latest Earnings Date	08/07/2018

**in millions USD, except per share data*

Market Cap	*485.13*
EV	*509.33*
Shares Outstandin	*36.74*
Annual Dividend	*0.00*
Dividend Yield	*0.00*
Dividend Payout	*0.0%*

FIN. SUMMARY

Period end	*12/31/2017*	*12/31/2018*	*12/31/2019*
Revenue	0.000	0.000	0.000
Gross Profit	0.000		
Gross Margin			
Operating Profit	(10.87)	(38.17)	(48.92)
Operating Margin			
Net Income	-10.79	-46.03	-48.92
EPS	-0.29	-2.02	-1.36

VALUATION RATIOS

	12/31/2018
EV/Sales	
EV/EBITDA	-13.54 x
P/E	-6.54 x
P/B	2.02 x
FCF Yield	

STOCK PRICE PERFORMANCE*

**As of*	11/6/2018
Last price	13.18
52 Week High	24.75
52 Week Low	8.89
YTD Change	-42.9%
1 Year Change	-42.9%
5 Year Change	-42.9%
10 Year Change	-42.9%

Eidos Therapeutics (EIDX) Probability Sentiment

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