

## Snippet roundup: Oxford jumps on Novartis's CAR-T and EU regulators think for themselves



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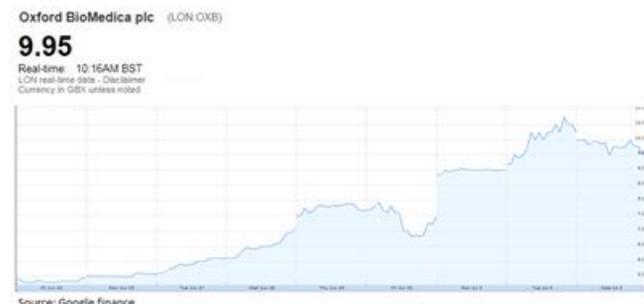
Welcome to your weekly roundup of *EP Vantage's* snippets – short takes on smaller news items.

This week, July 3 to 7, 2017, we had thoughts on the following: Oxford runs up on Novartis's coattails; Glaxo looks to AI to smarten up its drug discovery; with Besponsa EU again beats its opposite number to the punch.

### Oxford runs up on Novartis's coattails

**5 July, 2017**

Relative to Nasdaq the London stock exchange barely registers as a biotech battleground, but in the past week one stock has stood out: shares in Oxford Biomedica have nearly doubled. There appear to be two reasons for this: an article in the London Sunday Times spelling out Oxford's involvement with Novartis's CAR-T therapy CTL019, which faces a US adcom on July 12, and Oxford's refinancing of a £55m (\$71m) debt facility. For biotech watchers the CTL019 story is hardly new, but broad retail investor awareness has clearly helped; sources tell *EP Vantage* that institutional stake-building likely took place in the run-up, in addition to retail buying, but none of the holdings has yet been announced. With Oxford's market cap breaching £300m for the first time since 2015 investors should be aware that the company is merely the manufacturer of the lentivirus used for transfecting the CTL019 CAR-T cells, and Novartis recently signed a lentivirus technology deal with Bluebird Bio. This must for now be assumed to be a back-up, with the Swiss firm wanting to secure lentivirus supply, but it is not inconceivable that Oxford will in time come under price pressure.



### Glaxo looks to AI to smarten up its drug discovery

**3 July, 2017**

Yesterday's announcement that Glaxosmithkline is hooking up with the artificial intelligence company Exscientia marks the growing shift of healthcare AI into drug discovery, as large pharma companies finally start to embrace the potential of the technology. As part of its deal with Exscientia, Glaxo will be paying up to £33m (\$43m) to gain up to 10 disease-related targets across multiple therapy areas. The large pharma group will also be banking on Exscientia delivering on its promise of streamlining the drug discovery processes to reduce costs and timelines by a quarter compared with traditional approaches. Exscientia says much of this will be done by using AI to learn from experiments, thereby reducing the number of compounds required for synthesis and assays. If the UK company can deliver the savings it is claiming, then expect to see a lot more AI/big pharma deals in the future.

### With Besponsa EU again beats its opposite number to the punch

**3 July, 2017**

Friday's EU approval for Pfizer's Besponsa marks the CD22-directed antibody-drug conjugate as another in a growing list of drugs that have got the go-ahead in Europe but not in the US. In this case this looks like a simple difference in timing, as Besponsa is awaiting US approval under priority review, with an action date next month; still, it demonstrates again that the EU regulator is happy to work to its own agenda. Besponsa's EU indication is relapsed CD22-positive B-cell leukaemia, meaning that its approval should be of interest to

followers of Juno and Novartis, which are targeting the same antigen with CAR-T therapies. Of course, an antibody-drug conjugate is unlikely to elicit the same efficacy as CAR-T, but Besponsa could reduce the market size if it is given as an earlier line of therapy, since patients relapsing on it by antigen escape would no longer be candidates for an anti-CD22 CAR.

**Selected products approved in Europe but not the US**

Product	Company	US status	2022 global sales (\$m)	EU approval date
Olumiant	Lilly	Phase III	1,085	Feb 2017
Viviant	Pfizer	Phase III	489	Apr 2009
Raxone	Santhera Pharmaceuticals	Phase III	473	Sep 2015
Galafold	Amicus Therapeutics	Phase III	464	May 2016
Besponsa	Pfizer	Filed	347	Jun 2017
Translarna	PTC Therapeutics	Filed	302	Jul 2014
Imvamune	Bavarian Nordic	Phase III	204	Jul 2013
Adenuric	Menarini	Phase III	127	Apr 2008
Delyba	Otsuka Holdings	Phase III	117	Apr 2014
Teysuno	Otsuka Holdings	Phase III	105	Mar 2011

Source: EvaluatePharma.

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