

Asco 2019 - not a Marker of excellence



Jacob Plieth

Marker Therapeutics yesterday narrowly avoided becoming the first casualty of this year's Asco. The group [quietly slipped into an SEC filing](#) that the conference had rejected an abstract covering its MAPP T-Cell Therapy in pancreatic cancer, initially prompting an 11% share price fall, but after some sellside firefighting the stock ended the day off only 4%. As far as Asco abstracts that have been accepted go, only their titles were unveiled yesterday, but already some will have piqued investors' interest. [Mirati bulls will nervously await](#) Amgen's first phase I data on the KRAS inhibitor AMG 510, billed as best in class, while Roche's entrectinib, awaiting US approval for NTRK fusion-positive tumours and Ros1-mutated NSCLC, features in a study in children with mutated CNS cancers that has been selected for inclusion in the meeting's press programme. Meanwhile, investors looking at the Celgene contingent value rights (CVRs) set to be issued to Bristol-Myers Squibb will get little solace from abstracts featuring Liso-cel; one of the CVR's three triggers is Liso-cel's approval by the end of 2020, but efficacy data from the asset's lead indication, lymphoma, do not feature. Asco takes place from May 31 to June 4.

Selected Asco 2019 abstracts

Project	Company	Mechanism	Detail	Asco abstract
Entrectinib	Roche (ex Ignyta)	Kinase inhibitor	CNS tumours with gene mutations	10009
Liso-cel	Celgene/BMS	Anti-CD19 CAR-T	CLL study	7501
Liso-cel	Celgene/BMS	Anti-CD19 CAR-T	CRS & neurological toxicity	6637
AMG 510	Amgen	KRAS G12C inhibitor	First phase I data	3003

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