

Keytruda challenges Tecentriq on its home turf



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Roche, looking to regain lost ground in immuno-oncology, probably did not need Merck & Co to challenge it on its home turf of breast cancer. But it looks like this has happened with today's hit for Keytruda in the Keynote-355 study in first-line triple-negative disease. Still, the victory is equivocal, Keynote-355 extending progression-free survival only in $\geq 10\%$ PD-L1 expressers. The study presumably failed in all-comers and in the $\geq 1\%$ population, while its co-primary endpoint of overall survival has yet to be revealed. Roche's Tecentriq, in combination with Abraxane, already carries a first-line TNBC label in $\geq 1\%$ PD-L1 expressers thanks to the Impassion-130 trial, so perhaps the Keytruda threat does not yet amount to much. But Keytruda might also steal a march on Tecentriq in perioperative TNBC use, thanks to the separate Keynote-522 study, whose positive result stands in contrast to Tecentriq's recently failed NeoTRIPaPDL1 neoadjuvant trial ([Perioperative use proves elusive for Tecentriq, February 10, 2020](#)). And Keytruda earlier flunked the second-line TNBC study Keynote-119 in all-comers, so today's news suggests that Roche cannot afford to rest on its laurels.

Merck vs Roche in triple-negative breast cancer

Study	Treatment	Setting	Results
Impassion-130	Tecentriq + Abraxane	1st-line	Hit on mPFS in $\geq 1\%$ PD-L1; US & EU approved
Keynote-119	Keytruda monotherapy	2nd/3rd-line	Fail; exploratory OS hit in $\geq 20\%$ PD-L1
Keynote-355	Keytruda + chemo	1st-line	Hit on mPFS in $\geq 10\%$ PD-L1
Keynote-522	Keytruda + chemo	Neoadj + adjuvant	Hit on pCR, 13.6-point improvement, $p=0.00055$
NeoTRIPaPDL1	Tecentriq + chemo	Neoadjuvant	Miss on pCR
Impassion-031	Tecentriq + Abraxane	Neoadjuvant	Upsized by 120 subjects; data late 2020