

## Roche reminds the markets that it's a Kras player



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A low-key footnote to Roche's first-quarter financials today revealed that the group had put RG6433, a Shp2 inhibitor, into a phase 1 trial. This pharmacology is becoming an important mechanism in targeting Kras-driven cancers, as the Shp2 enzyme is thought to play a role in cycling Kras between its "on" and "off" states. It appears that RG6433 is Roche's new code for RLY-1971, a project the company [licensed from Relay Therapeutics for \\$75m up front last December](#). Relay had started its own phase 1 study of RLY-1971 over a year ago, but no data are available. The most advanced Shp2 player is Novartis with TNO155, a project being combined with Mirati's Kras G12C inhibitor adagrasib, while Merck & Co did an [early Shp2 deal with Otsuka in January](#). Revolution Medicine/Sanofi's RMC-4630, meanwhile, [disappointed at an AACR late-breaker](#), at least as monotherapy. Mirroring the actions of Novartis/Mirati, Roche's plan includes combining Shp2 inhibition with its early-stage [Kras G12C inhibitor GDC-6036, which is separately in phase 1](#). Given the growing interest in Kras it seems unlikely that these assets will remain under the radar for long.

### Src homology phosphatase (Shp) 2 inhibitor pipeline

Project	Company	Comment
TNO155	Novartis	<a href="#">Ph1/2 studies in combo with in Kras G12C inhibitors adagrasib (Mirati) &amp; JDQ443 (Novartis)</a>
RMC-4630 (SAR442720)	Revolution Medicines/Sanofi	<a href="#">Ph1/2 combo trial; deal signed Jul 2018</a>
JAB-3068	Abbvie/Jacobio	<a href="#">Ph1/2 ends Jul 2021; deal signed Jun 2020</a>
JAB-3312	Abbvie/Jacobio	<a href="#">Ph1 ends imminently; deal signed Jun 2020</a>
RG6433 (RLY-1971)	Roche/Relay Therapeutics	<a href="#">Ph1; deal signed Dec 2020</a>
BBP-398 (IACS-15509 / IACS-13909)	Navire (Bridgebio Pharma)	<a href="#">Ph1 started Nov 2020</a>
ERAS-601	Erasca	<a href="#">Ph1 (Flagshp-1) started Dec 2020</a>
SH3809	Nanjing Sanhome	<a href="#">Ph1 started Apr 2021</a>
HBI-2376	Huya Bioscience/Suzhou Genhouse	<a href="#">Preclinical; licensing deal Aug 2020</a>
ETS-001	Shanghai Etern Biopharma	<a href="#">Preclinical data at AACR 2021.</a>
Shp2 programme	Merck & Co/Otsuka	<a href="#">Preclinical; licensing option exercised Jan 2021</a>
Shp2 inhibitors	Redx Pharma	Earlier mentioned as a research project

Source: company announcements.

This story has been updated to add the Shanghai Etern asset.

