

Cytokinetics' heart win might make Bristol wince



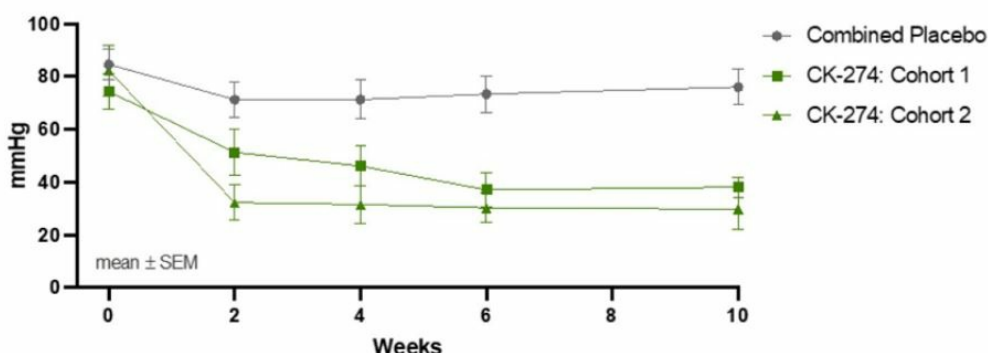
Amy Brown

After spending decades researching cardiac myostatin modulators, [with mixed success to date](#), Cytokinetics might have finally hit the target. The company's shares opened up 52% on topline data from the phase 2 Redwood-HCM trial, in patients with the rare heart condition hypertrophic cardiomyopathy (HCM). The study found CK-274 to be significantly better than placebo at improving blood flow through the heart on two measures; results hit significance across all time points and dosages. With data in only 41 patients the results need replicating but, the usual caveats notwithstanding, CK-274 could be a keen competitor to mavacamten, [for which Bristol Myers Squibb paid \\$13.1bn last year](#). Mizuho analysts pointed out that in cohort 2 - which used the likely phase 3 dosage - 92.9% of patients hit target gradient, a measure of heart pressure, [compared with 74% in mavacamten's HCM pivotal trial](#). A pivotal study will start by year end, executives said today, adding that they were open to partnering outside the US. Investors bidding up the stock are presumably hoping for a more expansive deal; even with a newly enlarged market cap of \$2bn, Cytokinetics is still worth considerably less than what Myokardia, mavacamten's maker, finally went for.

Post-Valsalva Left Ventricular Outflow Tract Gradient

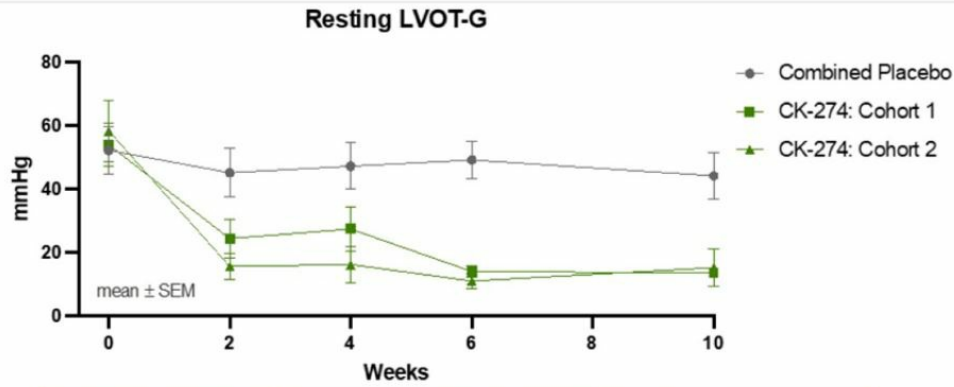


Valsalva LVOT-G



Mean ± SEM	Valsalva LVOT-G (mmHg)				
	Baseline	Week 2	Week 4	Week 6	Week 10
Placebo (n=13)	84.6	71.3	71.3	73.4	76
Cohort 1 (n = 14)	74.4	51.3	46.1	37.1	38.1
p-value vs placebo	-	0.097	0.038	0.0003	0.001
Cohort 2 (n = 14)	82.3	32.3	31.5	30.3	29.8
p-value vs placebo	-	0.0005	0.0005	<0.0001	<0.0001





Mean ± SEM	Resting LVOT-G (mmHg)				
	Baseline	Week 2	Week 4	Week 6	Week 10
Placebo (n=13)	52.1	45.0	47.1	49.0	44.0
Cohort 1 (n = 14)	53.8	24.3	27.3	13.9	13.4
p-value vs placebo	-	0.007	0.025	<0.0001	0.0003
Cohort 2 (n = 14)	58.2	15.5	16.1	10.9	15.1
p-value vs placebo	-	0.0002	0.0006	<0.0001	0.0004



Cytokinetics

Cytokinetics corporate presentation.

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