SECTOR
UPDATE

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Samsung Securities

The Korean version of this report was published on Mar 24

Healthcare Industry

EASL/ADA 2026: Post GLP-1, focus to shift

2026 trial data preview: Setting standards with data

Outcome-focused clinical significance assessment

① Cutting through academic noise to find ‘definitive return on investment’ metrics

During ADA and EASL seasons, what we truly need to focus on is the importance of the data. We compared the results of key domestic pipelines with those of global leaders, placing them on the same level. This approach defines not just a simple ‘good’ descriptor but a clear threshold that can move stock prices.

② Dissecting modalities: From peptides to synthetic drugs, the formula for success varies

Even within the same metabolic disease category, GLP-1 agonists’ weight loss, fibrosis improvement, and T2D combination effects require different evaluation standards. This report conducts an in-depth analysis of historical data and correlations between non-invasive (NIT) indicators and mechanisms, deriving ‘market-acceptable passing scores’ for each modality. It provides insight into the clinical value hidden behind the numbers.

③ Turning uncertainty into profit: Your choice 5 minutes before the results are announced

Clinical data announcements always come with ‘all-or-nothing’ volatility. Moving beyond post-event analysis, we have designed possible scenarios ranging from upbeat surprises to side-effect issues. This practical guidebook should help investors make immediate decisions on their positions, regardless of the outcome.

Efinopegdutide: Poised to compete in MASH therapy space

▶ **Efinopegdutide (GLP/GCG): Key differentiator in the competitive landscape is the GLP:GCG ratio tuned at 2:1, balancing liver-targeted efficacy with glycemic safety**

- To justify Merck's Phase-III clinical trial, at least 40% of patients treated with efinopegdutide must achieve MASH resolution, and at least 30% must show fibrosis improvement by ≥1 stage—figures approaching the current benchmark of survodutide (62% at 4.8 mg).
- However, it is not necessary to outperform survodutide numerically. If it demonstrates 'comparable efficacy alongside better tolerability'—given survodutide's severe GI adverse events (nausea 66%, vomiting 41%)—Merck's chances of advancing to Phase III would be high.
- Merck is already enrolling F4 patients (fibrosis stage F4 or cirrhosis) in MK-6024-017, and whether biopsy results suggest the potential for broader indications across the disease spectrum will also be critical.

GLP/GCG MASH clinical status

Product	Survodutide	Pemvidutide	Resmetriom
Company	Boehringer Ingelheim	Altimmune	Madrigal
Market cap	Unlisted	USD450m	USD10.27b
Development stage	P3 ongoing	P2	Approved
Target	GLP-1/GCG	GLP-1/GCG	THR-beta
Dosing cycle and method	Once weekly (SC)	Once weekly (SC)	Once daily (oral)
Clinical duration	48 weeks	48 weeks	52 weeks
Number of patients	293 (P2)	212 (P2)	966 (P3)
MASH resolution without worsening of fibrosis (%)	62% (4.8 mg) vs 14% p<0.001	59.1/52.1% vs 19.1% p<0.0001	26-30% vs 9.7% p<0.001
Fibrosis improvement without worsening of MASH (%)	34-36% (2.4~4.8mg) vs 22% n.s (numerical only)*	31.8%/34.5% vs 25.9% p-value not met	24~26% vs 14.2% p<0.001

Note: *Pair-wise comparison did not meet statistical significance, market cap as of Mar 23
Source: Each company, Samsung Securities

Efinopegdutide P2b scenario guide

Result	MASH resolution without worsening of fibrosis	Fibrosis improvement without worsening of MASH	Implication
★Surprise	>55%	>40%	P3 full spectrum expansion (F2-F4)
Pass	40-55%	30-40%	P3 entry, differentiation by narrowing indication (cirrhosis or combo)
△Neutral	30-40%	20-30%	Decision on hold, subgroup analysis
x Disappointment	<30%	Not met	Abandon MASH

Source: Samsung Securities

HM17321: UCN2 rewriting narrative—lose fat, keep muscle

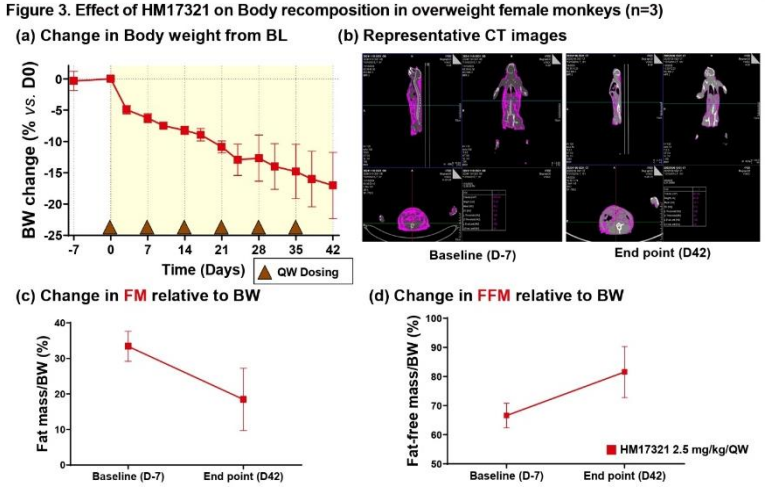
- **HM17321 (LA-UCN2): Demonstrated selective fat reduction without muscle loss in animal models; replication in humans to unlock potential**
  - Urocortin 2 (UCN2) has recently emerged as a highly promising target in the treatment of sarcopenia and muscle diseases, particularly due to its ability to increase muscle mass and improve cardiovascular function.
  - UCN2 is a peptide hormone that selectively binds to CRHR2. Activation of CRHR2 distributed in muscle cells promotes muscle protein synthesis, inhibits muscle breakdown enzymes, improves insulin resistance, and suppresses myostatin. Drug candidates are currently designed to bind exclusively to CRHR2 with over 99% selectivity.
  - HM17321: In non-human primates, 6 weeks of treatment resulted in a 17% reduction in body weight. No weight-loss plateau was observed, suggesting further weight loss may occur with longer-term administration. Fat mass (FM) decreased from 33% to 19%, while fat-free mass (FFM) increased from 67% to 81%, indicating selective fat loss without muscle loss.

UCN2 mechanism pipeline development status

Category		Remark
RT-100 (P2, Renova)	Gene therapy (AAV8)	Directly transfers UCN2 gene to induce long-term expression; strategy targeting simultaneous cardiovascular improvement and muscle strengthening; P2 results: LVEF increased by 5-8.1%p 4 weeks after highest dose administration, improved left ventricular diastolic function
GUB-UCN2 (P1/2a, Gubra)	Peptide	Mouse PoC data: defended against muscle loss at 0% level when combined with semaglutide, lost muscle mass recovered when UCN2 was additionally administered to mice that had already lost muscle due to GLP-1 administration
HM17321 (P1, Hanmi Pharmaceutical)	Peptide	Maximized CRFR2 selectivity using AI (HARP), blocked CRFR1 side effects; monkey PoC data: confirmed muscle-mass increase despite up to 17% weight loss compared to control group after 6 weeks of administration (encouraging level)

Source: Each company, Samsung Securities

HM17321 monkey data: Selective fat reduction confirmed



Note: Caution required in interpreting statistical significance due to small sample size (n=3)
Source: Hanmi Pharmaceutical, ADA 2025, Samsung Securities

HM15275: Triple agonist targeting not only GLP-1

▶ **HM15275: Distinguished by optimal GCG activity and minimized muscle loss; potential to become best-in-class if it demonstrates superior safety profile and weight-loss efficacy**

- HM15275 (LA-GLP/GCG/GIP): The triple agonist is currently in Phase-II trials, with top-line results expected in 1H27. The primary completion date is Jan 2027, when 36-week weight changes will be fully assessed. An additional Phase-II IND for diabetes indication was obtained in Jan 2026, with the clinical trial expected to begin in 1H.
- For HM15275 to become a game-changer (vs Lilly's triple agonist) it should: 1) achieve at least 25% weight loss, surpassing retatrutide's observed 20-22% fall at 36 wks; 2) preserve lean muscle mass while selectively reducing fat mass; 3) keep discontinuation rates due to adverse events at or below 10% through GCG receptor-related toxicity management. It should also sustain or improve glycemic control (HbA1c levels).

Eli Lilly Retatrutide P3 progress and results

Category	Note
TRUMPH1-7, Outcomes (obesity/OSA/OA)	TRUMPH-4: 12 mg in knee osteoarthritis (OA) + obesity patients, 68-week weight -28.7%; WOMAC (Western Ontario and McMaster Universities Osteoarthritis Index) pain -75.8%, paresthesia signal side effect.
	TRUMPH-1: 80-week long-term trial in obesity, Obstructive sleep apnea (OSA) patients, expected to achieve -30%; results to be announced in 2026.
	TRUMPH-2-6: results to be announced in 2026
TRANSCEND (T2D)	TRANSCEND-T2D-1: 12 mg in T2D + obesity patients, 40-week HbA1c up to 2.0%p↓, weight -16.8%, plateau not reached; detailed data to be announced at ADA 2026
SYNERGY-Outcomes (MASH)	SYNERGY-Outcomes: 72-week long-term trial in NASLD/MASH + liver fibrosis (F2-F4), obesity patients, results to be announced in 2027-2028

Source: Eli Lilly, Samsung Securities

HM15275 P2 expected results

Category		Note
Efficacy	Weight loss efficacy	Must show weight loss of 25% or more, surpassing GLP-1 mono (15%) or dual agonists (20-22%)
	Quality of body composition	Important to selectively cut fat mass while keeping lean mass rather than simple weight loss
Safety	Gastrointestinal side effects	Nausea, vomiting, and diarrhea rates must be lower compared to existing GLP-1 treatments; exceptionally excellent if discontinuation rate due to side effects during dose escalation period is less than 10%
	Cardiovascular safety	Glucagon stimulation can increase heart rate; toxicity concerns will be dispelled if blood pressure lowering and cardiovascular protective effects are observed
	Metabolic toxicity	Glucagon can theoretically raise blood sugar, but HM15275 is designed to offset this through optimal balance with GLP-1/GIP; thus, it should confirm the stable maintenance or improvement of blood sugar levels (HbA1c)

Source: Samsung Securities

Building momentum with DD01, powered by Oralink Platform

▶ **Early clinical data for DD01—though from a small cohort—may show consistent 48-week biopsy results**

- Boehringer Ingelheim's Survodutide (a GLP-1/GCG agonist administered weekly) achieved a 76.9% reduction in liver fat (≥30% decrease) at 48 weeks, DD01—also a once-weekly GLP-1/GCG agonist—reached 75.8% in just 12 weeks. With top-line 48-week biopsy data for DD01 expected at the EASL Congress in May 2026, we anticipate even higher rates of MASH resolution than that seen at 12 weeks due to DD01's direct acceleration of fatty acid oxidation via GCG activation.
- Key Consideration: The 48-week biopsy cohort includes only 30 patients—this sample size being four to six times smaller than those in trials for Survodutide or Pemvidutide. This means: 1) statistical significance for binary endpoints (like MASH resolution or fibrosis improvement) may be challenging to achieve; and 2) p-values may hover near the threshold of statistical significance.

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Note: *Pair-wise comparison did not meet statistical significance, market cap as of Mar 23
Source: Each company, Samsung Securities

DD01 P2b scenario guide

Results	MASH resolution w/o worsening of fibrosis	Fibrosis improvement without worsening of MASH	Implication
★Surprise	>55%	>40%	Accelerated speed of large-scale partnering negotiations upon achieving both endpoints at p<0.05
Pass	40-55%	30-40%	P3 possible at p=0.04-0.07 level; tech transfer negotiations underway
△Neutral	30-40%	20-30%	Important to confirm consistent trends in small-scale trials; retry with additional cohort or supplementary design
x Disappointment	<30%	Not met	Abandon MASH, value of ORALINK platform transferred to Pfizer remains independent

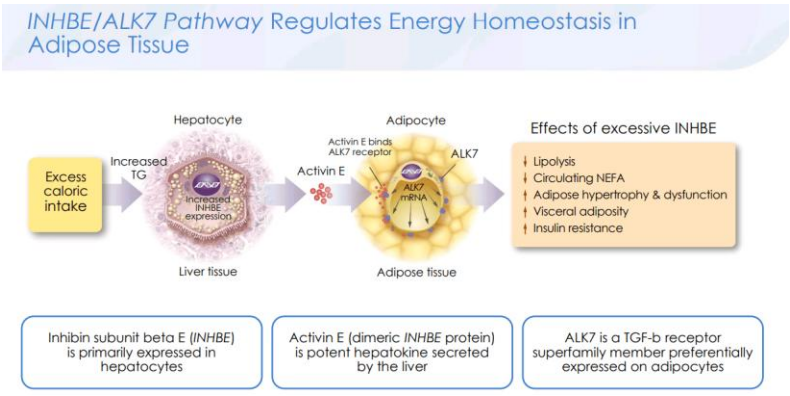
Source: Samsung Securities

Korea's only RNAi platform built for fat—beyond GLP-1

ALK7 siRNA—the next-generation obesity therapeutics based on adipose-targeting RNAi platform

- Mechanism: In the liver, a hormone called INHBE (Activin E) travels through the blood and binds to ALK7 receptors on fat cells—shutting down fat breakdown and promoting the accumulation of body fat. Blocking this signal enables the selective breakdown of visceral and liver fat—without triggering the muscle loss commonly seen with GLP-1 agonists.
- Competitive landscape: Arrowhead Pharmaceuticals recently disclosed clinical data for its own ALK7-targeting siRNA, ARO-INHBE, in parallel with Olix Pharmaceuticals. It shows the advantages of siRNA: long-lasting effects and precise delivery to adipose tissue. Early evidence suggests this approach minimizes muscle loss (vs GLP-1-based drugs), offering a clear differentiation path.
- Olix Pharmaceuticals is 2-3 years ahead of the broader field in terms of ALK7 siRNA development. A successful data readout may open the door to lucrative licensing-out negotiations.

Mechanism of INHBE, ALK7



Source: Arrowhead, Samsung Securities

Comparison of INHBE/ALK7 siRNA pipeline, by firm

Category	Pipeline	Target	Stage	Remark
Arrowhead	ARO-INHBE	INHBE	P 1/2	Used TRIM delivery system: visceral fat -23.2% when combined with Mounjaro, -15.6% alone
	ARO-ALK7	ALK7	P 1/2	Used TRIM delivery system: visceral fat -14.1% with single administration after 8 weeks
Alnylam	ALN-INHBE	INHIBE	Pre-clinical	Used GalNAc delivery system
	ALN-2232	ALK7	Pre-clinical	Used C16 delivery system
Wave Life Scienecs	WVE-007	INHBE	P1	Used GalNAc delivery system: body fat -4.5% at 3 months
Olix Pharmaceuticals	OLX501A	ALK7	Pre-clinical	Delivery system undisclosed: monkey data to be announced

Source: Each company, Samsung Securities

#Caregen

Total solution provider for obesity and metabolic diseases via peptide platform

Korglutide: A game-changer

- In Jan 2026, Korglutide (as an oral peptide) received US FDA approval as a New Dietary Ingredient (NDI). It simultaneously activates both the GLP-1 receptor (a Class B1 GPCR) and the IGF-1 receptor (a receptor tyrosine kinase).
- Early clinical data from India showed an average 10.75% body weight loss in just 12 weeks—with the convenience of a daily pill, it is positioned to be an alternative to injections.
- Korglutide is a compact peptide composed of seven amino acids (bioavailability details have not been disclosed). Typically, effective binding to the GLP-1 receptor requires dozens of amino acid contact interfaces. If Caregen releases detailed structural and binding affinity data about both targets, it could significantly bolster confidence in its mechanism of action and trigger a meaningful valuation rerating.

Korglutide Indian clinical results

Category	Korglutide	Placebo	P value
Body weight loss	-10.1% (-5.9 kg)	-2.0% (-1.27 kg)	**** p<0.0001
Bmi reduction	-10.1% (-2.52)	-1.9% (-0.46)	**** p<0.0001
Fat mass loss	-16.3% (-3.52 kg)	-2.4% (-0.56 kg)	**** p<0.0001
Muscle mass loss	-3.0% (-0.63 kg)	-2.0% (-0.47 kg)	-
Muscle mass ratio change	+2.8%	-0.47%	-
Visceral fat level	-13.5% (-1)	0% (0)	*** p<0.001

Note: Targets overweight and general adults who are not diabetic
Source: Caregen, Samsung Securities

Caregen product and pipeline development status

Drug name/project code	Indication/disease	Target	Status
Health functional food and others			
Deglusterol	Fatty liver/diabetes	IRS	Commercialized
Myoki	Sarcopenia	Myostatin	Commercialized
Korglutide	Weight management	GLP-1	Commercialized
CG-Antipollin	Fine dust	AHR	IND
CG-Addgrow	Height growth	HGH	IND
CG-Peptides	Anti-aging	Autography	Preclinical
Pharmaceuticals			
CG-Hyalux	Hyaluronidase	HA Degradation	Preclinical
CG-P5	Wet macular degeneration	VEGFR2	P1
CG-T1	Dry eye syndrome	PAC1R	P1
CG-SpikeDown	Lung disease, hypertension	ACE2	P1
Deglusterol	Fatty liver, diabetes	IRS	Preclinical
CG-Platide	Hemostasis	Self assemble	Preclinical

Source: Caregen, Samsung Securities

#G2GBio

Develops long-acting injectable therapeutics targeting obesity, dementia, and chronic pain by leveraging proprietary InnoLAMP platform

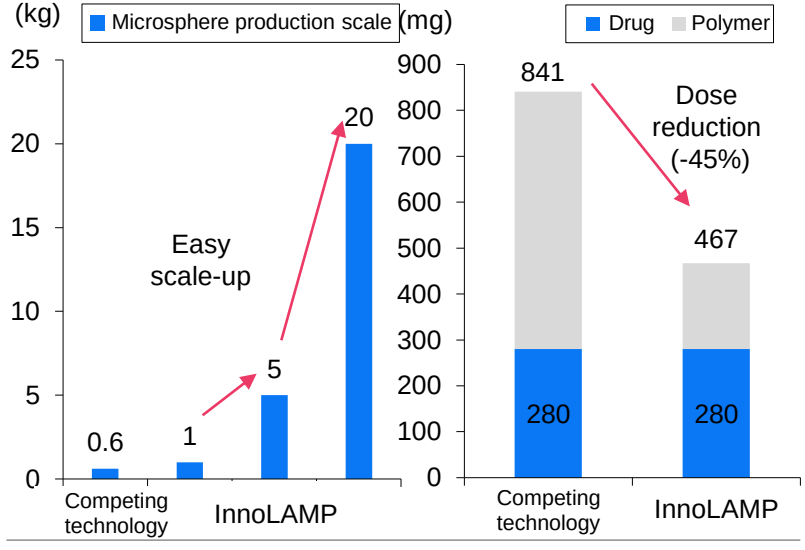
- **GB-7001-Once-monthly semaglutide formulation designed to replace current daily or weekly injectables, with first human PK data**
  - The core technological challenge in achieving sustained-release subcutaneous (SC) delivery—whether monthly or quarterly—lies in maximizing drug loading into microspheres while maintaining optimal bioavailability. G2GBio has demonstrated a key differentiator: it has successfully achieved drug loading levels of 60% for donepezil and 40% for semaglutide, enabling clinically viable SC dosing volumes.
  - Strategic partnership with Samsung Biologics: On Mar 16, G2GBio entered into a joint research, licensing, and co-investment agreement with Samsung Biologics and Epis NexLab for the development and license of GB-7001 (a once-monthly semaglutide-based obesity therapeutic). The agreement also includes a convertible bond (CB) investment. The partnership—following the earlier endorsement by Boehringer Ingelheim—further validates G2GBio's technology.
  - GB-7001 (semaglutide): IND submission and first human pharmacokinetic (PK) data are expected in 2H26 and 2027, respectively. Confirmation of stable, sustained plasma concentrations would trigger a significant revaluation of the platform.

Global GLP-1 once-monthly formulation development status

Developer	Remark
Ascendis	• Danish company possesses TransCon technology • Signed exclusive technology license agreement with Novo Nordisk in Nov 2024 (up to USD285m)
Camurus	• Swedish company possesses FluidCrystal technology • CAM2056: semaglutide once-monthly depot; P1b (n=80) completed (Nov 2025); weight -9.3% at 85 days at 10 mg vs once-weekly semaglutide -5.2% • Signed license agreement with Eli Lilly in Jun 2025 (USD870m)
Ascletis	• Chinese company possesses ULAP depot technology • ASC30: small molecule GLP-1 SC depot (half-life 46 days, once-monthly or quarterly) P2 ongoing for obesity indication (once monthly); weight -7.5% vs placebo at week 16 (Mar 2026); quarterly dosing paradigm possible due to drug concentration maintenance for 16 wks after last administration; weight loss effect inferior compared to Pfizer
Inno medicine	• Chinese company possesses ultra-long acting GLP-1 YN-001/Suba • Half-life 204 hours, developable as once or twice a month formulation; • P2b/P3 ongoing for obesity/diabetes indications (once weekly and once every two weeks)

Source: Each company, Samsung Securities

Competitive edge



Source: G2GBIO, Samsung Securities

Develops long-acting injectable therapeutics targeting obesity, dementia, and chronic pain by leveraging proprietary InnoLAMP platform

▶ **2026 catalyst update**

- Preparations for high-concentration formulations of peptide candidates (*eg*, cagrilintide, an Amylin analog) are now complete. Its use as a potential combination therapy with semaglutide could be discussed.
- GB-5001A (donepezil): Phase-I clinical data demonstrate: 1) a Tmax of 25-34 days (a 3-4x extended half-life compared to oral administration); and 2) linear AUC profiles (confirmed by actual human PK data). The multiple-dose clinical study report (CSR) is expected in Jul 2026, with results to be publicly disclosed shortly thereafter.
- Technology validation & out-licensing: Formulated drug substances are currently being delivered to Boehringer Ingelheim and a global pharmaceutical partner (Company B). Out-licensing negotiations may take place in earnest in 2H.
- In line with the planned competition of its second manufacturing facility in 2027, the company is actively expanding its portfolio of high-loading, high-bioavailability patents. This dual initiative strengthens both its intellectual property protection and negotiating leverage with potential partners.

G2GBio: Pipeline and collaboration status

Project	Pipeline	API/Original	Stage	Partner company	Contract type
Obesity/diabetes,	GB-7001/3 (1/3 months)	Semaglutide/Ozempic, Wegovy (1 week)	Efficacy/side effect study	Samsung Bioepis EpisNexLab	Technology transfer and joint research (global)
Metabolic disease	Undisclosed product		Formulation development (undisclosed)	Global company A	Under negotiation
Joint development	GB-70XX	Partner company material	Formulation development	Boehringer Ingelheim, Global company B	Co-development
Dementia	GB-5001A (1 month)	Donepezil/Aricept® (oral)	Phase 1	Humedix, Korea Pharma	Technology transfer and joint research (domestic)
Schizophrenia	GB-5021/3 (1/3 months)	Brexpiprazole efficacy/side effect study (oral)	Efficacy/side effect study	National project	
Immuno-suppressant	GB-5011 (1 month)	Oral formulation development	Formulation development	National project	
Animal medicine		Partner company material formulation development	Formulation development	Global company C	Contract development

Source: G2GBIO, Samsung Securities

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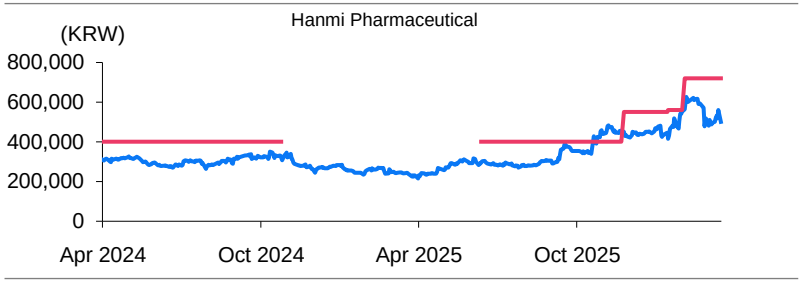
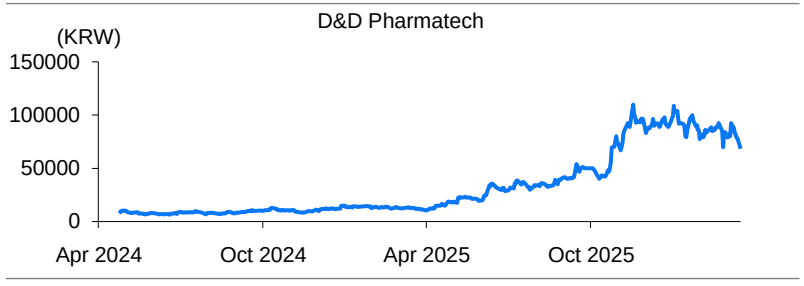
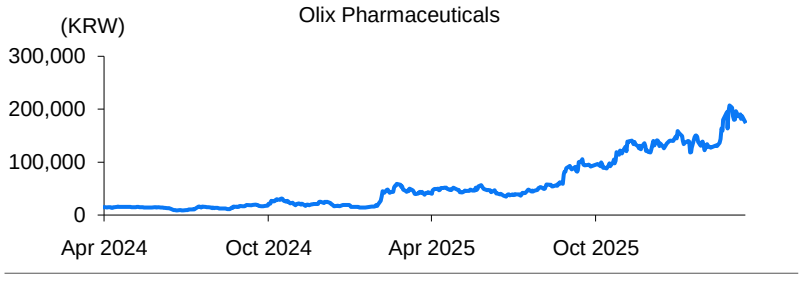
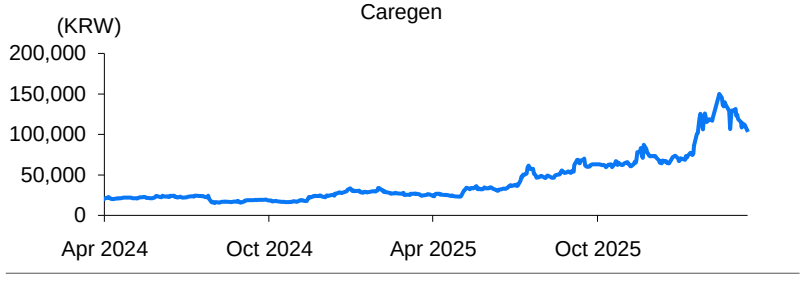
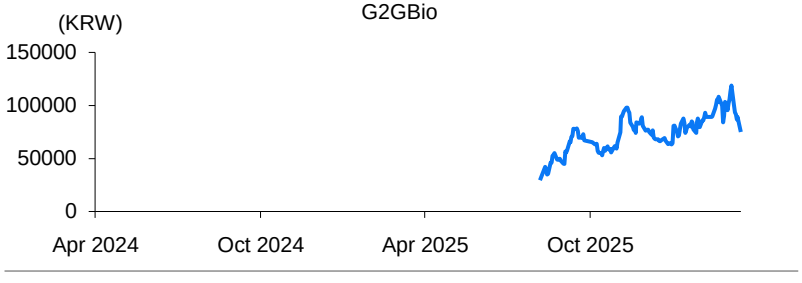
Target price/Rating changes in past two years (as of Mar 23)











Target price/Rating changes in past two years

Hanmi Pharmaceutical				
Date	2024/1/11	2025/12/1	2026/1/21	2/9
Recommendation	BUY	BUY	BUY	BUY
Target price (KRW)	400,000	550,000	560,000	720,000
Gap* (average)	-21.89	-19.38	-11.26	
(max or min)**	-11.75	-12.45	-1.43	

D&D Pharmatech	
Date	2026/3/24
Recommendation	Not Rated
Target price (KRW)	n/a
Gap* (average)	
(max or min)**	

Olix Pharmaceuticals	
Date	2026/3/24
Recommendation	Not Rated
Target price (KRW)	n/a
Gap* (average)	
(max or min)**	

Caregen	
Date	2026/3/24
Recommendation	Not Rated
Target price (KRW)	n/a
Gap* (average)	
(max or min)**	

G2GBio	
Date	2026/3/24
Recommendation	Not Rated
Target price (KRW)	n/a
Gap* (average)	
(max or min)**	

Target price/Rating changes in past two years

Samsung Securities uses the following investment ratings*

Company

BUY	Expected to increase in value by 15% or more within 12 months and is highly attractive within sector
HOLD	Expected to increase/decrease in value by less than 15% within 12 months
SELL	Expected to decrease in value by 15% or more within 12 months

Industry

OVERWEIGHT	Expected to outperform market by 5% or more within 12 months
NEUTRAL	Expected to outperform/underperform market by less than 5% within 12 months
UNDERWEIGHT	Expected to underperform market by 5% or more within 12 months

* Note: Effective Jul 27, 2023, BUY, HOLD, and SELL criteria are based on expectations of share-price moves of 15% or more within 12 months

Percentage of ratings in 12 months prior to 2026.03.31

BUY(85.2%)·HOLD(14.8%)·SELL(0%)

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