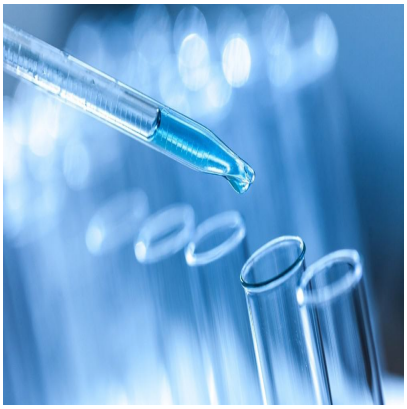

Value Investors: 1 Pharma Stock With Huge Potential and a Margin of Safety

Description

Trillium Therapeutics (TSX:TRIL)(NASDAQ:TRIL) is a clinical stage immuno-oncology company developing innovative therapies for the treatment of cancer.

Successful clinical development

Trillium's goal is to become a leading innovator in the field of oncology by targeting immune-regulatory pathways that tumour cells exploit to evade the host immune system. The company has a differentiated and comprehensive approach to targeting cancer cell treatment. The company is working on rapidly advancing the clinical development of Trillium's most advanced products: TTI-621 and TTI-622.

Currently, the company is in the process of identifying the maximum tolerated or recommended phase-two doses for both TTI-621 and TTI-622. Trillium plans to focus clinical programs on promising cancer indications.

CD47 is a form of immunoglobulin on the surface of many types of cancer cells that is highly expressed by multiple liquid and solid tumours. Generally, high expression is correlated with worse clinical outcomes, hence the company believes that Trillium's fusion proteins have the potential to be effective in a variety of cancers. Trillium has already identified several cancers where it saw positive responses to TTI-621 in patients, including B-cell and T-cell lymphomas.

Given that TTI-621 in certain indications shows promise, Trillium plans to evaluate the use of TTI621 and TTI-622 in combination with other anti-cancer drugs, including immunomodulatory agents.

Valuable intellectual property

Trillium's intellectual property is valuable. The company owns and controls patent rights covering Trillium's key products and therapeutic end uses. Several of the company's patents and patent applications are either granted or pending in major pharmaceutical markets. In all, Trillium's patent

treasure chest includes inventions in three different areas and modified new chemical entities.

Trillium controls two patent families. One family relates to the use of TTI-621 and TTI-622 to treat cancer. The other family relates to the company's drug as a composition of matter. Trillium has also filed for patent protection covering additional inventions relating to TTI-621 and TTI-622, including anti-cancer drug combination therapies that utilize biomarkers to identify responders. Further, the company protects intellectual property developed by it through the filing of patent applications within appropriate jurisdictions throughout the world.

Effective navigation of regulatory process

Government authorities in the United States, including federal, state, and local authorities, and in other countries, extensively regulate the manufacturing, research, and clinical development, distribution, post-approval monitoring and reporting, advertising and promotion, and export and import of biological products, such as those Trillium is developing. The process of obtaining regulatory approvals and the subsequent compliance with appropriate federal, state, local, and foreign statutes and regulations require the expenditure of substantial time and financial resources.

Trillium is particularly skilled at navigating this process to obtain required regulatory approvals. The company's global management has significant experience in securing final regulatory approval for the manufacture and sale of biological products in the U.S., Europe, Canada, and other commercial territories. This is a competitive advantage for Trillium, as the process is a long and costly and is controlled by that particular territory's regulatory agency.

Overall, Trillium's stock could be very valuable if the company is successful in developing innovative therapies for the treatment of cancer.

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