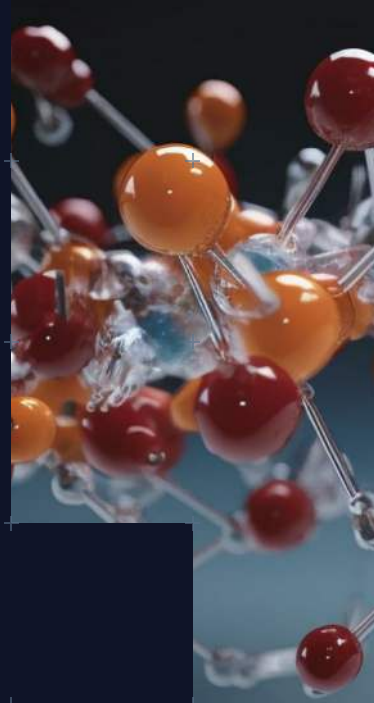


In the Weeks Since ADA 2023, We Asked Practicing Endocrinologists About the Data

by Sara Mallatt Stahl, Director of Stream Healthcare Research at AlphaSense



The American Diabetes Association (ADA) held its 83rd Scientific Sessions—the biggest diabetes conference of the year—in San Diego on June 23-26. In the weeks since, Stream by AlphaSense has gathered feedback from 12 U.S. physicians on key ADA presentations.

Notably, these are practicing physicians who did not participate in any of ADA studies, so this is a great boots-on-the-ground read of some of the most important data on diabetes and weight loss therapies this year. In addition, this note is an excellent supplement to the trove of ADA-related sell-side reports and company announcements available in the [AlphaSense platform](#).

Here's what Stream experts had to say about:

Eli Lilly's Tirzepatide and Retatrutide for Weight Loss

Tirzepatide: Two endocrinologists were enthusiastic about **Eli Lilly's** tirzepatide SURMOUNT-2 trial data for obese diabetic patients presented at the ADA Scientific Sessions. Both physicians said the study reinforced their view that the dual agonist GLP-1/GIP tirzepatide has greater weight loss benefit than **Novo Nordisk's** single agonist GLP-1 Ozempic (semaglutide). Nevertheless, these physicians had differing opinions about switching Ozempic patients to tirzepatide when tirzepatide supply and insurance coverage improve.

Retatrutide: Lilly also presented data on its Retatrutide triple agonist for weight loss, which elicited strongly favorable reactions from two other endocrinologists. Both expect Retatrutide

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to eventually take market share from other weight loss drugs, including tirzepatide and semaglutide, citing Retatrutide's superior weight loss data and a side effect profile that appears to be no worse for Retatrutide than for other drugs in the GLP-1 category.

[Endocrinologist Believes LLY's Tirzepatide is Superior for Weight Loss](#)

Primary Ticker: Eli Lilly & Co (LLY)

Other Companies Mentioned: Novo Nordisk A/S (NVO)

“

As soon as [tirzepatide] is available in a very easy way, a lot of my [Ozempic] patients are going to want to switch to this... Patients are clamoring for it... If you're already injecting [a weight loss drug], you might as well inject the best.

”

—[Endocrinologist in private practice](#)

[Endocrinologist Is Excited but Unsurprised About Weight Loss Benefits of LLY's Tirzepatide in the SURMOUNT-2 Trial](#)

Primary Ticker: LLY

Other Companies Mentioned: NVO

“

If I have a patient who needs more weight loss and more A1c reduction... and insurance will pay for it, [tirzepatide] is the first drug I will prescribe. If I have a patient who is doing very well on Ozempic... I'm not going to switch them to tirzepatide.

”

—[Endocrinologist at Columbia University Irving Medical Center](#)

[Endocrinologist Is Highly Impressed with ADA 2023 Presentation on LLY's Retatrutide for Obesity](#)

Primary Ticker: LLY

Other Companies Mentioned: NVO

“

We're all very excited knowing [Retatrutide] is possibly coming down the pipe. It seems that the side effect profile is very similar to [the single agonist] GLP and [dual agonist] GLP/GIP, but it seems like the weight loss is much more.

”

—[Endocrinologist in private practice](#)

[Endocrinologist Believes Additional Weight Loss With LLY's Retatrutide Is an Important Advantage Over Tirzepatide](#)

Primary Ticker: LLY

Other Companies Mentioned: NVO, Pfizer Inc. (PFE), Viking Therapeutics Inc. (VKTX), WW International Inc. (WW)

“

[Retatrutide] seems to be [much] more effective than the dual agonist drugs that have been coming out... What I find interesting is that... [compared with the] single agent and dual agent, the [gastrointestinal] side effects did not seem to be much worse [with Retatrutide].

”

—[Endocrinologist at Bronx Westchester Medical Group](#)

Editor's note: For more physician opinions about the SURMOUNT-2 tirzepatide study, visit the Stream expert transcript library for interviews with endocrinologists who discussed the early SURMOUNT-2 data Eli Lilly released in April, including [this one](#) and [this one](#) as well as [this one](#). As with the full SURMOUNT-2 data released at the ADA conference, the early results also generated positive physician reactions.

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Biomea Fusion's BMF-219 for Type 2 Diabetes

Two endocrinologists had positive reactions to the ADA conference presentation on **Biomea Fusion's** BMF-219 menin inhibitor, which aims to treat type 2 diabetes by increasing healthy insulin-producing beta cells. Both physicians commended the drug's glycemic control, duration of effect and novel mechanism of action, although the study's design limited the enthusiasm of one physician.

Endocrinologist Is Very Excited about Unique Approach of BMEA's BMF-219 to Type 2 Diabetes

Primary Ticker: Biomea Fusion Inc. (BMEA)

“

[BMF-219] would be a great addition to the armamentarium...of diabetes treatments.

”

—[Endocrinologist in private practice](#)

Endocrinologist Thinks BMEA's BMF-219 Data for Type 2 Diabetes at ADA 2023 Is Impressive but Leaves Questions

Primary Ticker: BMEA

Other Companies Mentioned: Abbott Laboratories (ABT), Dexcom Inc. (DXCM)

“

The data...showing not only improved hemoglobin A1C at the end of the treatment period, but sustained improvement to the 12-week period...is pretty impressive. The negative about [the study] is there's only two patients in each placebo group. It would have been nicer to have more in the placebo so you could see their changes relative to the treatment group.

”

—[Endocrinologist at The Ohio State University Medical Center](#)

Vertex's VX-880 for Type 1 Diabetes

Vertex's VX-880 presentation at the ADA conference left three endocrinologists with optimistic outlooks for the cell therapy's potential to reduce or eliminate insulin dependence, particularly among the estimated 5%-10% of type-1 diabetes patients with recurrent hypoglycemia. In addition, VX-880's use of stem-cell-derived islets for transplantation was considered an advantage over therapies using cadaver donor islets, which have supply issues.

Still, these physicians would like to see more study data and had questions about how patients may be affected by VX-880's requirement for immunosuppression. Also, two of the physicians in this group think closed-loop insulin pump systems under development could eventually compete for VX-880 patients.

Endocrinologist Is Impressed With VRTX's VX-880 for Type-1 Diabetes but Wonders About Immunosuppressive Regimen

Primary Ticker: Vertex Pharmaceuticals Inc. (VRTX)

“

Patients being off insulin therapy...they're going to feel a relief they have not [felt] for a long time... We need more data, but we are very excited for this [VX-880] technology.

”

—[Endocrinologist at Roper St. Francis Hospital](#)

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Endocrinologist Thinks VRTX's VX-880 Will Expand the Islet Transplantation Market for Type 1 Diabetes

Primary Ticker: VRTX

“

If you are thinking about how many people have type 1 diabetes or how many people would be a candidate for islet cell transplant... you certainly couldn't meet that demand with cadaveric islets. I'm much more optimistic on the use of stem cell islets.

”

—[Endocrinologist at UAMS Medical Center](#)

Endocrinologist Considers VRTX's VX-880 Data in Type 1 Diabetes Very Promising but Needs to See More Results

Primary Ticker: VRTX

Other Companies Mentioned: LLY, Sernova Corp (SVA.CA)

“

For patients who...[have] multiple severe hypoglycemic events per year...my enthusiasm [for VX0880] is very high because this is really an opportunity to get insulin independence. For all other [patients], my enthusiasm is much less...[because] the need for immunosuppression far outweighs the benefit conveyed by the [VX-880] therapy.

”

—[Endocrinologist at Columbia University Medical Center](#)

Medtronic's New Insulin Pump

Two endocrinologists had divergent opinions about how the adoption of **Medtronic's** new MiniMed 780G insulin pump is likely to be influenced by ADA conference presentations that focused on the 780G's glycemic control, time-in-range data, wear time requirements, and simplified meal management.

One endocrinologist, who is at a practice where Medtronic pumps are widely used by type 1 diabetes patients, believes the MiniMed 780G is likely to appeal to patients on previous-generation Medtronic pumps and could prevent some from switching to competing products. Conversely, the other endocrinologist reported few patients using Medtronic pumps because of bad past experiences with Medtronic technology and does not believe the new pump is differentiated enough to convince patients to adopt it.

Endocrinologist Thinks the Recent Upgrades to the MDT Minimed Insulin Pump Are a Game Changer

Primary Ticker: Medtronic PLC (MDT)

Other Companies Mentioned: ABT, Beta Bionics Inc., DXCM, Insulet Corp. (PODD), LLY, Tandem Diabetes Care Inc. (TNDM)

“

Medtronic is still the number one insulin pump used by my patients. They're all excited about 780G.

”

—[Endocrinologist with East Coast Medical Associates](#)

Endocrinologist Does Not Think Recent Insulin Pump Data From MDT Will Sway Patients or Physicians

Primary Ticker: MDT

Other Companies Mentioned: ABT, Beta Bionics Inc., DXCM, PODD, TNDM

“

[The MiniMed 780G] certainly does seem like a better device than previous versions, the 670G, 770G... That being said, many, many of my patients on a pump right now had been on a Medtronic previously. As a general rule, they did not have a good experience. I think it's very unlikely those patients will choose to go back to Medtronic.

”

—[Endocrinologist at Diabetes and Metabolism Specialists](#)

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Nevro's Spinal Cord Stimulator for A1C and Weight Reduction

An interventional pain physician responded to Nevro's ADA conference presentation with a "healthy dose" of skepticism and questioned the study's finding of a correlation between Nevro's high-frequency (10 kHz) spinal cord stimulation and reductions in patients' A1c and body weight. (Editor's Note: See Stream in AlphaSense's [June Healthcare Recap](#) for expert feedback on challenges Nevro faces in the marketplace.)

Pain Medicine Physician Is Skeptical About ADA 2023 Data on A1C and Weight Reductions From NVRO's SCS Implant

Primary Ticker: Nevro Corp. (NVRO)

Other Companies Mentioned: ABT, Boston Scientific Corp. (BSX), MDT

“

There are likely other factors [helping Nevro's results]. The biggest factor might just be this is a study population of patients who were... closely working with a lot of contacts in the healthcare community... I don't think the cause of their weight reduction is 10,000 [Hz of] stimulation in the spinal cord.

”

— [Interventional pain physician at Vanderbilt University Medical Center](#)

Check Out Stream's Previous 2023 Healthcare Conference Notes

[American Society of Clinical Oncology \(ASCO\) 2023 Annual Meeting](#)

[American College of Cardiology \(ACC\) 2023 Scientific Session](#)

[American Academy of Orthopaedic Surgeons \(AAOS\) 2023 Annual Meeting](#)

About AlphaSense

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Headquartered in New York City, AlphaSense employs over 1,000 people across offices in the U.S., U.K., Germany, Finland and India.

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