

Insulet \$PODD

Inhalt

Insulet \$PODD	1
Was macht PODD?	2
Wachstumszahlen.....	2
INSULET IN 1 MINUTE	3
Ausführlicher Report:.....	3
One in a Thousand.....	4
Risks and When We'd Sell	6
The Foolish Bottom Line.....	6
SmartMoney.....	7
.....	7
Charttechnik.....	8
Trade-Setup.....	8

All	New Buy	Increased	Unchanged	Decreased	Sold Out	High Conviction
13	6	2	0	5	4	1
1,674,535 SH	1,002,535 SH	331,181 SH	0 SH	340,819 SH	238,387 SH	178,600 SH

Einleitung

Diese Aktie wird zur Zeit von Fool.com zum Kauf empfohlen. Fool.com ist eines der zahlreichen Abos, die ich unterhalte. Das spart mir eine Menge Zeit. Ich werte die Empfehlungen für mich aus und time meine Käufe. Denn Fool.com hat oft ein hundsmiserables timing.

Wer gleich zum Trade-Setup gehen möchte, scrollt zum Ende des Dokuments.

Was macht PODD?

Insulet (PODD) stellt Insulinpumpen für Diabetiker her. Dieser Markt ist gigantisch. Daher tummeln sich etliche Firmen darin. PODD sticht allerdings heraus, da PODD eine Art Apple für Diabetiker darstellt. Besseres Design und mehr Komfort. Und Ihr wisst, je einfacher etwas ist, desto eher nimmt der Mensch es an.

Wachstumszahlen

Growth



PODD shows a strong growth in Earnings Per Share. In the last year, the EPS has been growing by **247.83%**, which is quite impressive.

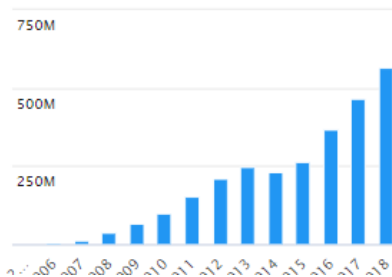
The **Revenue** has been growing by **24.56%** on average over the past 5 years. This is a very strong growth!

The **Earnings Per Share** is expected to grow by **271.48%** on average over the next 2 years. This is a very strong growth

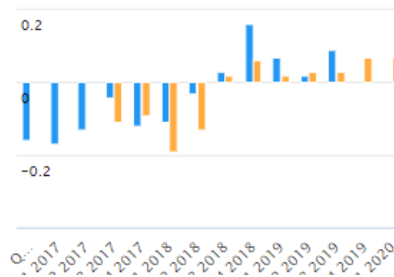
The EPS growth is stable: in the next 2 years the growth will be about the same than in the last 5 years.

PODD shows a strong growth in Revenue. In the last year, the Revenue has grown by **31.03%**.

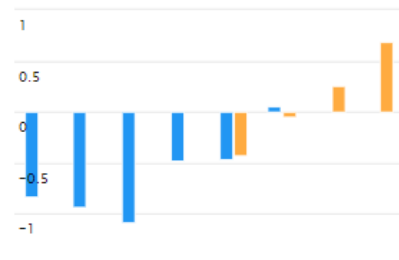
Yearly revenue



Quarterly EPS VS Estimates



Yearly EPS VS Estimates



INSULET IN 1 MINUTE

WHAT IT DOES

Insulet develops, manufactures, and sells the Omnipod, an insulin delivery system for people with diabetes.

WHY BUY

- Insulet's Omnipod has a unique design that makes it easier to use and less obtrusive than conventional insulin pumps.
- The company has an enormous untapped opportunity: The market is still dominated by conventional needles, while Insulet has made great strides in improving coverage and access.
- The Horizon closed-loop system, to be introduced next year, could make pumps far more appealing to patients with insulin-dependent diabetes.

Ausführlicher Report:

Hier der Artikel von Fool im Original. Ihr könnt den Text auch einfach durch den Google-Übersetzer jagen, wenn es Euch zu mühselig ist, ihn auf Englisch zu lesen.

Daily insulin doses are a reality for millions of people. Diabetes is, unfortunately, one of the most common illnesses in the world, and it's on the rise. The disease affects over 9% of the U.S. population, and while it was once much less common elsewhere, that's no longer really the case. The global prevalence of diabetes in people over 18 was around 4.7% in 1980; by 2014, that had risen to 8.5%. It's a major cause of blindness, kidney failure, heart attack, stroke, and death.

Fortunately, we can do a lot more to treat it than we once could. Traditionally, that has meant multiple self-administered injections a day, with all the attendant inconvenience and discomfort. But for many patients, there is a better way: the insulin pump. Using a computer to deliver precise, steady doses of insulin means better control of blood glucose. And nobody does it quite like the company I'm recommending today: **Insulet** ([NASDAQ: PODD](#)).

Since we first recommended it in 2014, Insulet's stock has gone up fivefold. But we still see a huge opportunity ahead for a company that has barely pricked the surface of its potential market.

One in a Thousand

Insulet certainly isn't the only pump manufacturer, although it is a leader behind industry giant **Medtronic** ([NYSE: MDT](#)) and alongside other major players like **Roche** (otc: RHHBY), **Sanofi** ([NASDAQ: SNY](#)), and **Abbott Laboratories** ([NYSE: ABT](#)). What makes the company unique is its tubeless system.

Insulet's Omnipod devices are sometimes referred to as "patches," because the small, low-profile pump adheres directly to the skin, delivering insulin through a flexible cannula that automatically inserts and stays in place for up to 72 hours. After that, it is disposed and replaced. Patients can wear the device while bathing, swimming, during physical activities, and so on. A conventional pump has tubing that can get caught on things and generally has to be removed around water, posing a risk to glucose control.

Think of Insulet as the **Apple** ([NASDAQ: AAPL](#)) of insulin delivery — leveraging better design and more convenience to carve out a significant niche in a competitive market. But the real competition here isn't other pump makers; it's needles. That's both a challenge and an enormous untapped opportunity.

Only about 1 in 1,000 people with diabetes use a pump. And that's because, despite the advantages of pumps, they also come with some drawbacks. They run a heightened risk of infection around the insertion site. And inadvertent interruptions of supply lead to heightened risk of diabetic ketoacidosis, a dangerous complication. But the major challenges are twofold: Higher expense and the need for better insurance coverage, and the complication of use. Insulet's Omnipod automatically takes care of most steps, like priming and insertion, but there's still room for improvement around optimizing delivery and minimizing the patient's role in measuring and monitoring.

The real holy grail of insulin pumps is a truly closed-loop system, sometimes referred to as an "artificial pancreas." The idea is a system that continuously monitors blood glucose and doses insulin to maintain precise blood glucose levels based on measurements and algorithms, without any input from the user. This is harder to do than it might seem, because it requires algorithms that either anticipate blood glucose levels

(which can be hard to do if patients have unexpected meals or physical activity) or react to it based purely on measurement (which can also be troublesome because of the lag between the need for insulin and the body's reaction to it).

Nevertheless, this is yet another area where improved machine learning is making greater strides. The company plans to launch its Horizon hybrid closed-loop Omnipod in the second half of 2020. For the considerable computational power needed to optimize dosing, the system will rely on patients' smartphones, but the system will also work when a phone is out of reach. Other companies are also working on closed-loop systems, but Insulet is hoping to keep an edge both through its unique tubeless design and its superior algorithms.

Insulet's revenue has roughly tripled since we first recommended it, and it has swung from losses to profits. Investors have certainly taken notice, but don't focus on that so much as the fact that this is a company with a much more proven path forward than it had five years ago.

The stock has been particularly strong this year — it has more than doubled year to date — as the company has crushed its own revenue guidance and repeatedly raised its targets, while producing more on the bottom line than Wall Street anticipated. Insulet just reported its fifth consecutive quarter of revenue growth above 20%, meaning it is growing faster now than it was when we first recommended it — despite its larger size.

The company already has a strong presence among the approximately 1.7 million U.S. patients with type 1 or "insulin-dependent" diabetes. But it is seeing fast growth among the 2.5 million to 3 million patients with type 2 (adult onset) diabetes who also rely on daily insulin. Add to this addressable market of 4 million to 5 million people a similar-sized population in its international markets.

Driving adoption is better coverage (one of the chief challenges for pump adoption is its higher cost), particularly among the many type 2 patients on Medicare. It is increasingly reaching patients through a pharmacy benefit rather than a medical benefit, making it easier to access the device. We see revenue passing \$1 billion in 2021 and continuing to grow at 20% beyond that point. Profits should grow far faster as the company

continues to leverage its scale. For long-term thinkers, that makes the company's current market cap of around \$11 billion look pretty appealing. Insulet is, after all, addressing a huge market of customers that represent regularly recurring revenue.

Risks and When We'd Sell

The closed-loop Horizon system may not have the impact we're hoping for. The first hybrid closed-loop system, Medtronic's MiniMed 670G, was approved by FDA in 2016. It has been successful, but one study found that nearly 40% of patients stopped using it within nine months because it required a lot of calibrations and had glitches stopping it from operating ideally (it frequently dropped out of automatic mode and required patient control).

That's an opportunity for Insulet to do better, but Medtronic is certainly a competent competitor, and the technology may still have kinks to iron out. Insulet is taking a different approach by putting more of the algorithm into the pod itself, rather than a wireless connected device, which is one problem with the 670G. But we will have to wait and see what the real-world results look like.

Meanwhile, there are some aspects of insulin pumps that are hard to improve on. It is ultimately a device that needs to be worn at all times. For patients used to self-administering injections, that may just not be a compelling prospect unless the company can produce a system that results in significantly better disease management. Attrition rate among patients who choose to stop using pumps, including the Omnipod, is a significant factor, although the company doesn't share detailed data about this. We'd like to hear management at least anecdotally report improvements in this, however, because it's an earlier sign that the Omnipod has the potential to reach a much broader audience.

The Foolish Bottom Line

We live an age of machine learning and artificial intelligence, where smart algorithms can improve the performance of existing devices and lead to better ones. That holds particular promise in healthcare, where smart care

can extend life. Insulet is already a leader in diabetes care, but its investments in better products, coverage, and marketing are just now coming to fruition. We're looking for this \$11.3 billion company to grab a much larger share of the insulin delivery market — one still dominated by old-school needles — even as it gains a further edge over its competitors. Considering that diabetes remains one of the most widespread illnesses in the world, there's little limit to what the company can do.

SmartMoney

Es gibt fünf neue Käufe und vier Komplettverkäufe. Alles in allem halt es sich die Waage. Aber das vierte Quartal fehlt noch. In ein paar Tagen kommen die neuen SEC-Filings (Meldungen über Transaktion)

All	New Buy	Increased	Unchanged	Decreased	Sold Out	High Conviction
13	6	2	0	5	4	1
1,674,535 SH	1,002,535 SH	331,181 SH	0 SH	340,819 SH	238,387 SH	178,600 SH

Charttechnik

PODD mit Backtest des Breakoutniveaus bei 170\$. Sie befindet sich in einem intakten Aufwärtstrendkanal. Innerhalb dessen hat sie in den 4-5 Wochen korrigiert und ist an der Unterstützung bei 170\$ Halt angekommen. Knapp darunter verläuft die weitbeachtete 50er Tageslinie. Die ebenso als Unterstützung dient. Sie könnte aber noch bis zum 50% Retracement fallen, wo auch die UTL (uptrendline) verläuft, was für die Aktie ein typisches Verhalten wäre. Sie könnte aber auch hier noch eine Weile konsolidieren bis sie die UTL irgendwann berührt. Auf jeden Fall ist sie in einem Bereich, wo sie mein Interesse hat, weil ich hier den Einstieg sehr häufig perfekt timen kann. Und damit ein hervorragendes CRV erhalte.

Mein Plan ist also geduldig zu beobachten, ob die Unterstützung hält und bei einem Umkehrsignal würde ich dann kaufen. Diese Location gefällt mir gut, da man einen sehr engen Stop Loss setzen kann. Wir müssen nur vor einem Fakeout auf der Hut sein. Deswegen kaufe ich nicht gleich.



Trade-Setup

Wir warten geduldig auf ein Umkehrsignal an der Unterstützung