BUSINESS: Abbott Laboratories operates four segments: Pharmaceutical Products (56.5% of 10 sales) develops, manufactures, and sells a broad line of adult and pediatric pharmaceuticals, which are sold primarily on the prescription, or recommendation, of physicians; Diagnostic Products (10.8%) designs and manufactures diagnostic tests for blood banks, hospitals, labs, physicians' offices, etc.; Nutritional Products (15.7%) are a wide range of adult and pediatric nutritional products; and Vascular products (7.9%), including endovascular devices; Other (7.9%). ‘10 R&D: $3.7 billion. Of the overall company. The strong margins and cash flow of the new entity, coupled with relatively slower growth, make it more likely that it will deliver lower double-digit growth this year. We have raised our 2012 share-net estimate by $0.10 to $5.10. Our upward revision reflects the first-quarter result, which also included an increased assumption for future margins. Our call is at the top of management’s updated guidance range of $5.00-$5.10.

The company remains on track for the anticipated spinoff by year-end. Abbott Laboratories has been floating its ft 10-b, providing some insight regarding the split of its Proprietary Pharmaceuticals and Medical Capital Products businesses. However, no information was given regarding the pricing of the two structural assets. Due to divestment plans, the company has been able to reduce its debt to $6.2 billion, representing 22.3% of 2011 sales, but the business should still derive lower double-digit growth this year. We have raised our 2012 share-net estimate by $0.10 to $5.10. Our upward revision reflects the first-quarter result, which also included an increased assumption for future margins. Our call is at the top of management’s updated guidance range of $5.00-$5.10.

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