POLITICS & PEPTIDES

September 25, 2026

Gemini Notebook

97%

In a small, early-stage study, one group receiving Viking Therapeutics' experimental drug VK2735 every other week maintained 97% of its its initial weight loss.

That result covers just a 12-week maintenance phase. It is an encouraging signal, not proof of lasting weight control.

Source: Viking study announcement | Date: Sept 25, 2026

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TODAY'S BIG IDEA

The obesity-drug competition is shifting. The central question is no longer merely, "How much weight can a drug help people lose?" It is now: "Can people maintain that loss with treatment they can access and sustain?"

Simultaneously, Washington is actively debating the FDA leadership that will oversee this exact evidence and shape future approvals.

Source: Industry Analysis, FDA Public Records | Date: Oct 10, 2026

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THE FDA LEADERSHIP TEST

WHAT CHANGED

The Senate HELP Committee held a confirmation hearing yesterday for FDA commissioner nominee Dr. Heidi Overton. Chairman Bill Cassidy demanded a faster, more predictable review process that maintains rigorous scientific standards.

WHY NOW

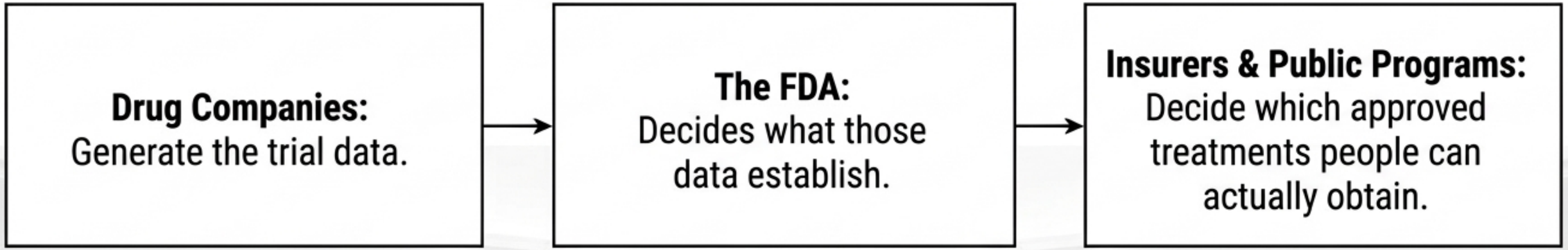
An expanding pipeline of obesity treatments is fast approaching the FDA. How the agency evaluates clinical evidence will directly dictate outcomes for developers, clinicians, and patients.

Source: Senate HELP Committee | Date: Sept 25, 2026

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THE HIDDEN POWER STRUCTURE

The Evidence-to-Access Pipeline



Who Wins / Who Loses

Developers and patients benefit from timely, credible decisions on strong studies. Patients bear the ultimate cost when weak claims gain traction or sound evidence stalls.

Source: Industry Analysis, FDA Public Records, Senate HELP Committee | Date: Oct 10, 2026

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THE CONTRARIAN VIEW

> **“Faster reviews are not automatically better.”** Predictable standards and public trust may carry more long-term market weight than speed alone.

WATCH THE NEXT 7–30 DAYS

- ✓ Monitor the nomination’s progress.
- ✓ Watch for specific **commitments** regarding agency capacity.
- ✓ Track statements on **clinical evidence** and review **standards**.

Source: Industry Analysis, FDA Public Records, Senate HELP Committee | Date: Oct 25, 2026

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Source: UN speech coverage | Date: Sept 25, 2026

A UN SPEECH WITH TWO AUDIENCES

WHAT CHANGED

Prime Minister Benjamin Netanyahu used his UN address to defend Israel's actions amid regional conflict, prompting dozens of delegates to walk out as he began speaking.

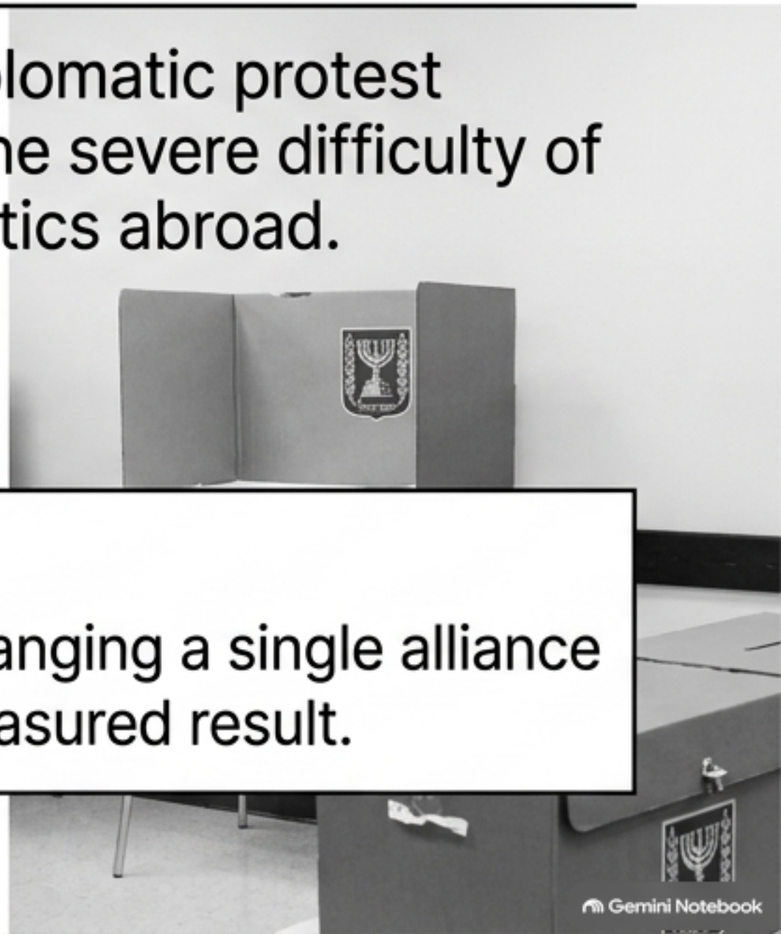
WHY NOW

The address intersects two critical timelines: the UN General Assembly and a domestic Israeli election campaign.

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THE ELECTORAL INTERPRETATION

Side A (Domestic Voter)	Side B (International Critic)
A forceful speech may reinforce Netanyahu’s support among some voters at home.	The visible diplomatic protest underscores the severe difficulty of persuading critics abroad.



THE CONTRARIAN VIEW

A memorable speech can dominate a news cycle without changing a single alliance or policy. Electoral effects remain an interpretation, not a measured result.

Source: Election data analysis, diplomatic reports | Date: Oct 25, 2026

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WATCH THE NEXT 7–30 DAYS

- Confirmed diplomatic meetings.

- Material government actions.

- Israeli polling conducted strictly *after* the speech.

Do not treat commentary about the speech's political effect as measurable election data.

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FOLLOW THE COALITIONS IN CD 25

WHAT CHANGED

The National Federation of Independent Business and the Florida Police Benevolent Association have formally backed Republican Scott Singer in Florida's 25th Congressional District race.

WHY NOW

Endorsements are surfacing as critical campaign signals as November approaches.



Source: Campaign finance reports, candidate announcements | Date: Oct 25, 2026

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THE ENDORSEMENT FUNNEL

The Endorsement Headline
(Organizational Validators for Singer)

Persuadable Voters
(Does the endorsement reach beyond existing supporters?)

Turnout Mechanics
(Money, Volunteers, Member Communication)

THE CONTRARIAN VIEW

An endorsement headline is not a turnout operation. The true value lies only in what these organizations **actually do** after the announcement.



Source: Florida CD 25 endorsements | Date: Sept 25, 2026

WATCH THE NEXT 7–30 DAYS

1.

Independent spending.



2.

Field activity.



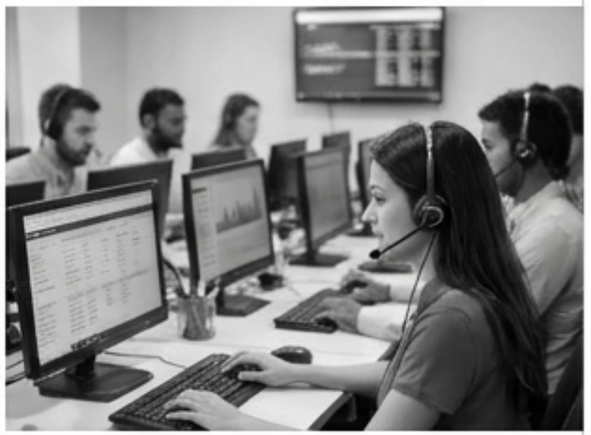
3.

District-specific polling.



4.

Measurable voter contact.



Source: Campaign finance reports, candidate announcements, polling data | Date: Oct 25, 2026

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A LOCAL FUNDING TEST

WHAT'S IN PLAY

Miami-Dade voters will decide whether to renew a school property tax supporting teacher pay and school safety, pushed by school leaders amid mounting budget pressure.

WHY IT MATTERS

The referendum tests a critical assumption: whether theoretical support for teachers actually translates into support for a dedicated tax.

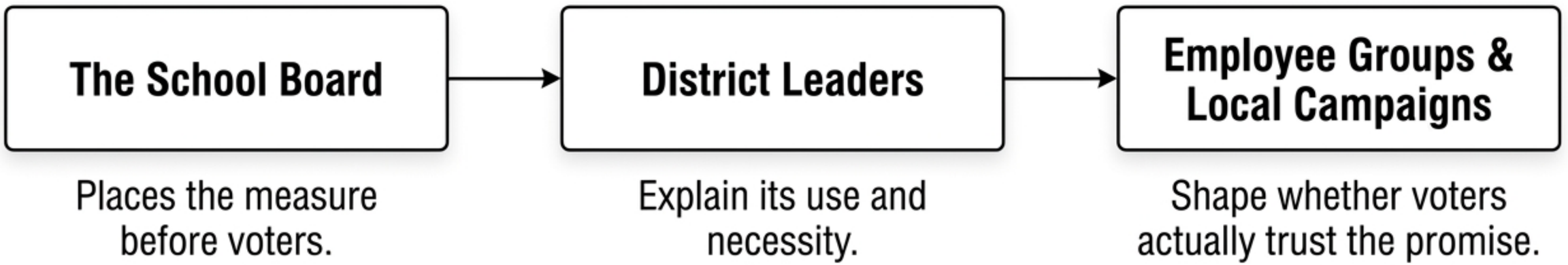
THE TENSION

These are related questions, but they are not identical.

Source: Local election data and reports | Date: Oct 26, 2026

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THE HIDDEN POWER STRUCTURE



WATCH THE NEXT 7–30 DAYS

Monitor town halls, ballot messaging, and credible local polling.

Warning: Separate the Miami-Dade measure from Orange County's referendum.

Source: Miami-Dade school referendum | Date: Sept 25, 2026

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MAINTENANCE IS THE NEXT BATTLEGROUND

WHAT CHANGED

Viking reported results from a roughly 180-person VK2735 study detailing outcomes from a maintenance period following initial weekly treatment.

WHY NOW

The defining question for patients, clinicians, and payers increasingly extends beyond initial weight loss to the long-term burden of staying on treatment.



WHO WINS

If less frequent treatment works in larger, longer studies, patients gain options.

Competing developers face new pressure to demonstrate durable results, convenience, and tolerability.

Source: Clinical trial data and reports | Date: [Date, e.g., Nov 15, 2026]

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THE TEMPORAL LIMITS OF THE STUDY

21 WEEKS
(Initial Weekly Treatment Phase)

12 WEEKS
(The Maintenance Window)



CHRONOLOGICAL ACTIVATION BAR

The results strictly reflect this short 12-week maintenance window. They are company-reported early signals, not verified long-term clinical truths.

Source: Clinical trial data and reports | Date: [Date, e.g., Nov 15, 2026]

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THE 12-WEEK MAINTENANCE DATA

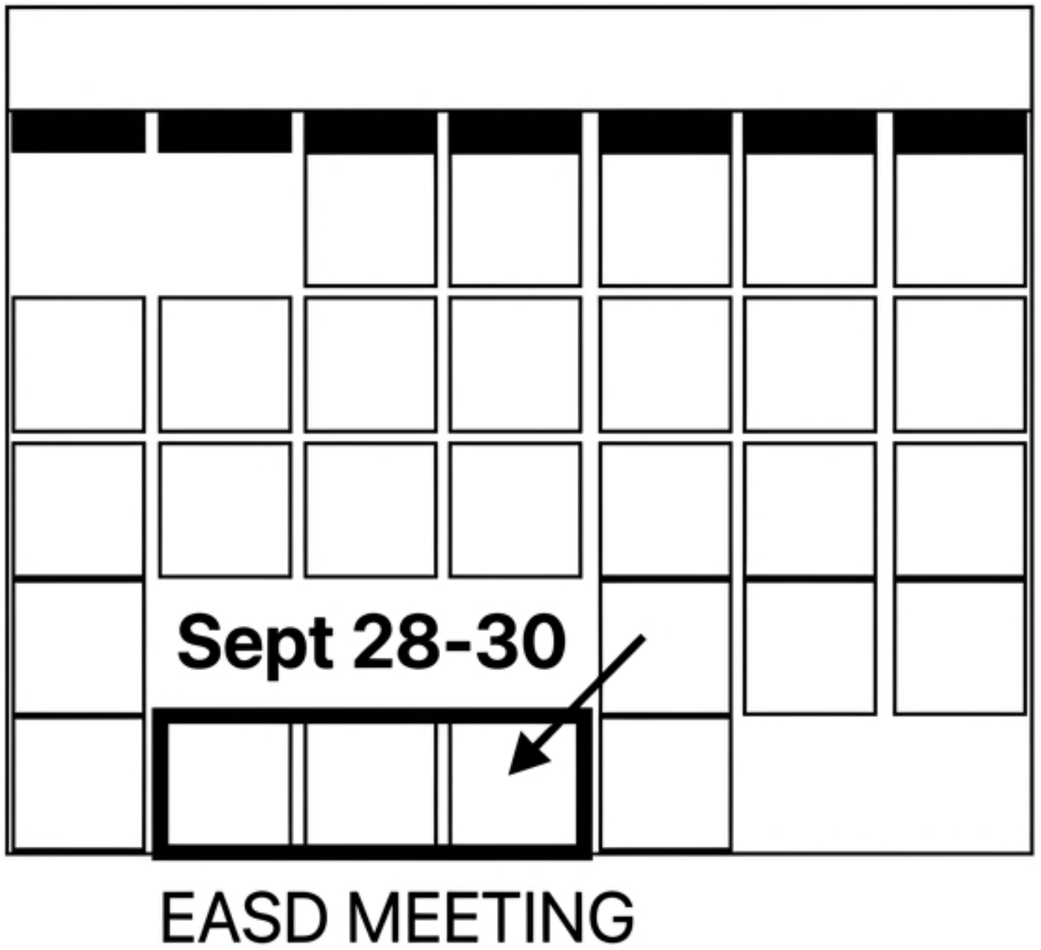
Every-Other-Week	Monthly	Placebo
97% of prior weight loss maintained (Select groups).	90% of prior weight loss maintained (Select groups).	61% of prior weight loss maintained.

Crucial Caveat: The phrasing “up to” highlights only the best-performing groups. Do not present these results as established long-term outcomes or compare them directly with other drugs’ trials as if they were head-to-head.

Source: Viking study announcement | Date: Sept 25, 2026

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THE NEXT CATALYST: EASD MEETING



Upcoming Event
Lilly plans to present additional Phase 3 retatrutide data at the EASD meeting beginning September 28, including a September 30 presentation on TRIUMPH-2.

Context
Lilly previously reported up to 20.8% average weight loss at 80 weeks in a trial involving adults with obesity/overweight and type 2 diabetes.

Analytical Rule
Retatrutide remains investigational. Treat the upcoming presentation as a chance to inspect fuller data, not as an approval event.

Source: Lilly EASD preview | Date: Sept 25, 2026

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THE CONVERGENCE THESIS

The decisive question is changing from, “Which medicine produces the biggest headline number?” to **“Which treatment has credible evidence, a workable long-term regimen, and a path to real patient access?”**

The Unifying Insight: Science dictates the headline number. Regulators, payers, and politics shape everything else.

Source: Viking study announcement | Date: Sept 25, 2026

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