Media and analysts’ conference
9 March 2021
Welcome!
A difficult year managed with success & important course-setting for the future
Marc Werner, CEO

Annual financial statements 2020
Felix Burkhard, CFO

Q&A
All
A difficult year managed with success &
important course-setting for the future

Marc Werner, CEO

Media and analysts’ conference, 9 March 2021
### COVID-19 Facts & figures 2020

**Higher volumes at Galenica**

<table>
<thead>
<tr>
<th>+60% Logistics volumes in spring</th>
<th>+200% Online Sales</th>
<th>+550%¹ Septoclean®</th>
<th>+3,000% Masks</th>
<th>&gt; 10,000 Rapid tests</th>
</tr>
</thead>
</table>

¹ Figures Copyright © 2021 IQVIA – Switzerland year-end data 2020
COVID-19 Facts & figures 2020
Market declines also affected our business

-30%¹)
Anti-Brumm®

-20%¹)
Rhinitis & cold products

-8%
Algifor®

-30%
Customers in Galenica high-traffic locations

¹) Figures Copyright © 2021 IQVIA – Switzerland year-end data 2020
Yet we still successfully further developed the operational business!

- +17 new pharmacies
- Generic substitution rate increased
- Mail-order pharmacies
- Comeback of Vita-Merfen®
- Expansion: new partner products, Hedoga acquisition
- New partnerships
- New ERP software
- Modernisation of distribution centre in Lausanne

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Definition of strategic programmes

Strategic programmes

- Omni-Channel
- Care
- Professionals
- Efficiency

“IMPLEMENT STRATEGY IN A FOCUSED, TARGETED AND SWIFT MANNER.”
Strategic programmes

**Targets**

### Omni-Channel
- Best customer experience, anytime and anywhere
- Online and offline channels
- Product range

### Care
- First point of contact
- Health services
- Preferred cooperation partner

### Professionals
- Partner of first choice
- Leader in e-health

### Efficiency
- Simple and efficient
- Process and cost optimisation

### Transformation
- Employees fit for the future
- Competent, agile teams
Since 1 January 2021

Management structure of Galenica Group

1) Joint venture with Coop

Status: January 2021
Management team

Executive Committee

Marc Werner
CEO
Felix Burkhard
CFO
Virginie Pache Jeschka
Chief Pharmacies Officer
Daniele Madonna
Chief Healthcare Officer
Thomas Szuran
Chief Products & Marketing Officer
Andreas Koch
Head of Wholesale & Logistics

Extended Executive Committee

Lukas Ackermann
Chief IT & Digital Services Officer
Marianne Ellenberger
Head of Human Resources
Christina Hertig
Head of Corporate Communications
Jürg Pauli
Chief Transformation Officer
Barbara Wälchli
General Counsel & Secretary of the Board of Directors
Strategic programmes
FOCUS 2021

Omni-Channel
- Range, product portfolio, pharmacy network, online offering
- Interlinking of online and offline worlds

Care
- E-prescription → Mail-order pharmacies
- Healthcare offers & partnerships

Professionals
- Growth of care homes and doctors
- Digital networking
- Specialist retail offering

Efficiency
- ERP & distribution centre in Lausanne

Transformation
- Implementation of new organisation
Our customer promise

We support people at every stage of life on their journey towards health and wellbeing. With personal and expert advice and a unique range of products and services. Anytime and anywhere in Switzerland.
Vision
Health and wellbeing are at the heart of what we do. They are the reason we give our best every day.

Values
- WE BUILD TRUST
- WE SHOW RESPECT
- TOGETHER, WE ARE STRONGER
- WE ACT AS ENTREPRENEURS
- WE PARTICIPATE WITH PASSION

Customer promise
We support people at every stage of life on their journey towards health and wellbeing. With personal and expert advice and a unique range of products and services. Anytime and anywhere in Switzerland.

Strategic programmes
- Omni-Channel
- Care
- Professionals
- Efficiency
- Transformation
If we correctly and consistently implement vision and customer promise, the fruits of our labour will drive the success of Galenica.
Step by step upwards
2020: Break due to COVID-19
Galenica Group
Stable result despite COVID-19

**Net sales** (in million CHF)

- **2019**: 3’301
- **2020**: 3’480
  - Increase: +5.4%

**EBIT adjusted\(^1\)** (in million CHF)

- **2019**: 166.9
- **2020**: 168.6
  - Increase: +1.0%

---

\(^1\) Details of the adjustments of IAS19 and IFRS16 effects, in the Annual Report 2020, pages 89 and 90
Retail

Strong expansion of the pharmacy network

**Net sales** (in million CHF)

<table>
<thead>
<tr>
<th>Year</th>
<th>Expansion</th>
<th>Organic</th>
<th>thereof one-time effect of process optimisation</th>
<th>thereof impact of price cuts</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>+5.6%</td>
<td>+0.4%</td>
<td></td>
<td>-1.8%</td>
</tr>
<tr>
<td>2020</td>
<td>+3.2%</td>
<td>-0.5%</td>
<td></td>
<td>-1.6%</td>
</tr>
</tbody>
</table>

**Expansion of the pharmacy network**

<table>
<thead>
<tr>
<th></th>
<th>2019</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pharmacies added</td>
<td>+19</td>
<td>+17</td>
</tr>
<tr>
<td>Pharmacies restructured</td>
<td>-8</td>
<td>-7</td>
</tr>
<tr>
<td>Net pharmacies added</td>
<td>+11</td>
<td>+10</td>
</tr>
</tbody>
</table>

**Net sales**

2019: 1’516

2020: 1’556

**Expansion**

2019: +2.7%

2020: +3.2%

**Elements of growth:**

- **Expansion** (1) +2.7%
- **Organic** (2) +0.4% (3) -0.5% (4) +3.2%

1) Calculated only including point of sales without a full year period comparison, Annual Report 2020, page 88
2) Consolidated net sales less expansion effect, Annual Report 2020, page 88
3) As a part of a process optimisation, various intersegmental sales transactions were discontinued at the beginning of 2020.
4) Mandatory price reductions of medications reimbursed by health insurers of the specialties list (SL/LS) released by the Federal Office of Public Health (FOPH), calculated based on volumes of previous period, Annual Report 2020, page 88
Retail
COVID-19 related sales losses compensated by strong online growth

Pharmacies in high-frequency locations strongly affected:
- Average fall in sales -23%
- Impact on organic sales growth of Retail business sector -1.9%

Strong online growth:
- Sales of webshops tripled
- Mediservice sales > CHF 300 Mio. (+5.7%)

Absence of cough & colds:
Sales losses of cough & cold and travel-related products compensated by higher sales of nutrition, prevention, hygiene products
Products & Brands
Strong sales growth due to expansion of product portfolio

<table>
<thead>
<tr>
<th>Net sales (in million CHF)</th>
<th>2019</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expansion^1)</td>
<td>+9.2%</td>
<td>+17.3%</td>
</tr>
<tr>
<td>Organic^2)</td>
<td>+2.1%</td>
<td>-7.9%</td>
</tr>
<tr>
<td>thereof Swiss market</td>
<td>-0.1%</td>
<td>-7.2%</td>
</tr>
</tbody>
</table>

^1) Calculated only including business activities without a full year period comparison (acquisitions and new license agreements), Annual Report 2020, page 88
^2) Consolidated net sales less expansion effect, Annual Report 2020, page 88
Growth of OTC market driven by prevention products

Consumer Healthcare Market 2020

- Nutrition +4.0%
- Personal care -3.7%
- OTC +4.4%
- Patient care +12.3%

Total cough & cold products part of OTC segment:

<table>
<thead>
<tr>
<th>Top 10 markets in 01</th>
<th>Value streetprice 2020 in M CHF</th>
<th>Growth 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total cough &amp; cold, others</td>
<td>295.0</td>
<td>-4.5%</td>
</tr>
<tr>
<td>Immunostimulants</td>
<td>47.3</td>
<td>+135.3%</td>
</tr>
<tr>
<td>Nasal decongestants</td>
<td>43.8</td>
<td>-11.8%</td>
</tr>
<tr>
<td>Sore throat remedies</td>
<td>43.5</td>
<td>-16.3%</td>
</tr>
<tr>
<td>Cold remedies</td>
<td>40.5</td>
<td>-22.7%</td>
</tr>
<tr>
<td>Chesty Cough Products</td>
<td>29.5</td>
<td>-24.3%</td>
</tr>
<tr>
<td>Anti-allergics</td>
<td>22.9</td>
<td>+32.4%</td>
</tr>
<tr>
<td>Nasal saline solutions</td>
<td>21.2</td>
<td>-0.5%</td>
</tr>
<tr>
<td>Products for oth. resp. conditions</td>
<td>17.5</td>
<td>-12.6%</td>
</tr>
<tr>
<td>Dry cough products</td>
<td>15.6</td>
<td>-30.4%</td>
</tr>
<tr>
<td>Decongestant rubs&amp; inhalants</td>
<td>12.3</td>
<td>-9.5%</td>
</tr>
<tr>
<td>Rest</td>
<td>1.0</td>
<td>-14.6%</td>
</tr>
</tbody>
</table>

Source: IQVIA Phamatrend for pharmacies and drugstores in Switzerland, streetprices

09.03.2021 © Galenica Group
Health & Beauty Segment
Stable EBIT despite significant impact of COVID-19

Net sales (in million CHF)

<table>
<thead>
<tr>
<th>Year</th>
<th>Net Sales (in million CHF)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>1'621</td>
</tr>
<tr>
<td>2020</td>
<td>1'671</td>
</tr>
</tbody>
</table>

EBIT adjusted\(^1\) (in million CHF)

<table>
<thead>
<tr>
<th>Year</th>
<th>EBIT Adjusted (in million CHF)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>123.7</td>
</tr>
<tr>
<td>2020</td>
<td>123.9</td>
</tr>
</tbody>
</table>

Estimated impact of COVID-19:
- EBIT: negative impact of CHF -8 to -10 million

\(^1\) Details of the adjustments of IAS19 and IFRS16 effects, in the Annual Report, pages 89 and 90
Services
Strong sales development due to market share gains

Net sales (in million CHF)

<table>
<thead>
<tr>
<th>Year</th>
<th>Net sales</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>2,441</td>
</tr>
<tr>
<td>2020</td>
<td>2,632</td>
</tr>
</tbody>
</table>

EBIT adjusted\(^1\) (in million CHF)

<table>
<thead>
<tr>
<th>Year</th>
<th>EBIT adjusted</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>44.7</td>
</tr>
<tr>
<td>2020</td>
<td>45.4</td>
</tr>
</tbody>
</table>

One-time effect of adapted invoicing models\(^2\):

- +2.3%

Growth w/o one-time effect:

- +5.5%

Impact of price cuts\(^3\):

- -2.3%

- -1.8%

Estimated impact of COVID-19:
- Net sales: +1.4%
- Neutral impact on EBIT: additional sales compensated by additional costs

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\(^1\) Details of the adjustments of IAS19 and IFRS16 effects, in the Annual Report 20, pages 89 and 90

\(^2\) In the context of the new Ordinance on Integrity and Transparency in the Therapeutic Products Sector (OITTP), agreements with suppliers as well as invoicing models were adapted to the new transparency obligations, which influenced the sales development in the Services business sector.

\(^3\) Mandatory price reductions of medications reimbursed by health insurers of the specialities list (SL/LS) released by the Federal Office of Public Health (FOPH), calculated based on volumes of previous period, Annual Report 2020, page 88
Swiss pharmaceutical market by channel 2020

**Value (ex-factory): CHF 6,331.7 million**
CHF +176.9 million / +2.9%

- **Hospitals**: 1'633.9 million (+3.1%)
- **Drugstores**: 67.5 million (+13.1%)
- **Physicians**: 1'600.4 million (+3.1%)
- **Pharmacies**: 3'029.8 million (+2.4%)

**Volume (packs): 183.0 million**
-3.3 million / -1.8%

- **Hospitals**: 16.6 million (-3.2%)
- **Drugstores**: 6.6 million (+8.7%)
- **Physicians**: 41.2 million (-3.1%)
- **Pharmacies**: 118.6 million (-1.6%)

Source: APO/ID/DR/SD/PI Index, Swissmedic A, B, C, D
Medicines Swissmedic lists A, B, C, D, sold from suppliers and wholesalers to hospitals, physicians and drugstores

09.03.2021 © IQVIA Switzerland - Swiss pharmaceutical market 2020
# EBITDA and EBIT adjustments

<table>
<thead>
<tr>
<th></th>
<th>2019</th>
<th>2020</th>
<th>in %</th>
<th>2019</th>
<th>2020</th>
<th>in %</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>EBITDA (in million CHF)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EBITDA adjusted</td>
<td>210.4</td>
<td>213.6</td>
<td>+1.5%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Adjustment IAS 19</td>
<td>-0.1</td>
<td>43.0</td>
<td></td>
<td>-0.1</td>
<td>43.0</td>
<td></td>
</tr>
<tr>
<td>Adjustment IFRS 16</td>
<td>50.0</td>
<td>52.9</td>
<td></td>
<td>2.7</td>
<td>1.8</td>
<td></td>
</tr>
<tr>
<td><strong>EBITDA</strong></td>
<td>260.3</td>
<td>309.5</td>
<td>+18.9%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td><strong>EBIT (in million CHF)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EBIT adjusted</td>
<td>166.9</td>
<td>168.6</td>
<td>+1.0%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Adjustment IAS 19</td>
<td>-0.1</td>
<td>43.0</td>
<td></td>
<td>-0.1</td>
<td>43.0</td>
<td></td>
</tr>
<tr>
<td>Adjustment IFRS 16</td>
<td>2.7</td>
<td>1.8</td>
<td></td>
<td>2.7</td>
<td>1.8</td>
<td></td>
</tr>
<tr>
<td><strong>EBIT</strong></td>
<td>169.5</td>
<td>213.3</td>
<td>+25.9%</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Financial result (in million CHF)

<table>
<thead>
<tr>
<th></th>
<th>2019</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>financial result adjusted</td>
<td>-3.2</td>
<td>-2.4</td>
</tr>
<tr>
<td>Effects of IAS19 and IFRS16</td>
<td>-2.9</td>
<td>-2.4</td>
</tr>
<tr>
<td>Financial result</td>
<td>-6.1</td>
<td>-4.7</td>
</tr>
</tbody>
</table>

### Taxes (in million CHF)

<table>
<thead>
<tr>
<th></th>
<th>2019</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial result adjusted</td>
<td>-29.7</td>
<td>-35.9</td>
</tr>
<tr>
<td>Effects of IAS19 and IFRS16</td>
<td>-8.4</td>
<td>-8.4</td>
</tr>
<tr>
<td>Financial result</td>
<td>-38.1</td>
<td>-35.9</td>
</tr>
</tbody>
</table>

### Details

1) Details of the adjustments of IAS19 and IFRS16 effects, in the Annual Report 2020, pages 89 and 90
2) Details of one-time effects of deferred taxes, in the Annual Report 2020, pages 112
Galenica Group

Pleasing net profit growth

(in million CHF)

2019 2020

125.3 172.7 +37.8%
134.2 34.8
138.0

-8.4 +2.8%
-0.5

One-time effects of deferred taxes$^1$

Net profit comparable, adjusted$^2$ and excluding one-time effects of deferred taxes$^1$

Effects of IAS19 and IFRS16$^2$

---

$^1$ Details of one-time effects of deferred taxes, in the Annual Report 2020, pages 112

$^2$ Details of the adjustments of IAS19 and IFRS16 effects, in the Annual Report, pages 89 and 90
Galenica Group
Investments

(in million CHF)
% of net sales

<table>
<thead>
<tr>
<th>Year</th>
<th>Investments in tangible assets</th>
<th>Investments in intangible assets</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>34.2</td>
<td>18.9</td>
</tr>
<tr>
<td>2020</td>
<td>36.5</td>
<td>20.5</td>
</tr>
</tbody>
</table>

1.6% (in million CHF)

Ongoing investments in strategic efficiency projects:
- Replacement of the ERP system in Wholesale and pre-wholesale as well as renovation of distribution center Lausanne-Ecublens to be completed by 2023
- Remaining investments of ~CHF 44-48 million (investments in 2020: CHF 15.2 million)
<table>
<thead>
<tr>
<th>in million CHF</th>
<th>2019</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Cash flow from operating activities before working capital changes</strong></td>
<td>237.4</td>
<td>238.8</td>
</tr>
<tr>
<td>Payment of lease liabilities</td>
<td>-47.6</td>
<td>-49.1</td>
</tr>
<tr>
<td><strong>Cash flow from operating activities before working capital changes adjusted</strong></td>
<td>189.8</td>
<td>189.7</td>
</tr>
<tr>
<td>Working capital changes</td>
<td>13.0</td>
<td>-14.4</td>
</tr>
<tr>
<td><strong>Cash flow from operating activities adjusted</strong></td>
<td>202.8</td>
<td>175.3</td>
</tr>
<tr>
<td>Cash flow from investing activities without M&amp;A</td>
<td>-57.8</td>
<td>-57.3</td>
</tr>
<tr>
<td><strong>Free cash flow before M&amp;A</strong></td>
<td>145.0</td>
<td>118.0</td>
</tr>
<tr>
<td>Cash flow from M&amp;A</td>
<td>-77.1</td>
<td>-58.4</td>
</tr>
<tr>
<td><strong>Free cash flow</strong></td>
<td>67.9</td>
<td>59.6</td>
</tr>
</tbody>
</table>
Galenica Group
Solid balance sheet

(in million CHF)

Debt coverage\(^1\) 2.1x

Debt coverage adjusted\(^2\) 1.5x

<table>
<thead>
<tr>
<th>Year</th>
<th>Net debt adjusted</th>
<th>Equity adjusted</th>
<th>Effect of IFRS16</th>
<th>Net debt / EBITDA</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>1'000</td>
<td>1'053</td>
<td>-53</td>
<td>1.5x</td>
</tr>
<tr>
<td>2020</td>
<td>1'053</td>
<td>1'110</td>
<td>-57</td>
<td>1.7x</td>
</tr>
</tbody>
</table>

1) Net debt / EBITDA, Annual Report 2020, page 93
2) Net debt adjusted / EBITDA adjusted excluding effects of IAS19 and IFRS16, Annual Report 2020, page 93
3) Detail of the adjustments in the Annual Report 2020, page 92

© Galenica Group
**Dividend 2020**
**Proposal to the Annual General Meeting**

<table>
<thead>
<tr>
<th>(in CHF)</th>
<th>2019</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Gross dividend per share</strong></td>
<td>1.80</td>
<td>1.80</td>
</tr>
<tr>
<td>of which paid out from retained earnings</td>
<td>0.90</td>
<td>0.90</td>
</tr>
<tr>
<td>of which paid out from capital contribution reserves</td>
<td>0.90</td>
<td>0.90</td>
</tr>
</tbody>
</table>
Outlook regulation

<table>
<thead>
<tr>
<th>Category</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
<th>2022</th>
<th>……</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reduction in drug prices</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Generics prices</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>„Reference price system“</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Political discussion ongoing</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Distribution margin</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SBR IV (\rightarrow) SBR V</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>SBR IV extended until the end of 2021, new proposal under discussion</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>OTC products(^1): category changes, online trade</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>2019</td>
<td></td>
</tr>
<tr>
<td>Political discussion about mail-order ongoing</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

\(^1\) Swissmedic categories C, D
New Segment structure as of 1st January 2021

- No major changes within the segments
- As in the past, additional details on net sales within the segments will be provided
Assumptions:

- Persistent negative impact of COVID-19 in the first months of 2021.
- Lack of colds, absence of a seasonal flu epidemic and continued low mobility will continue to have a particularly strong impact on pharmacy sales in high-frequency locations and at Verfora.
- Significant improvement and normalisation of the situation from Q2 and especially in H2 of 2021.

Guidance 2021:

- Galenica Group net sales +1% to +3%
- EBIT (excluding the effects of IAS 19 & IFRS 16) +2% to +5%
- Dividend for 2021 at least at prior-year level.
Mid-term Guidance

- Expected market growth in the next few years: +1% to +2%
- Galenica plans to **grow faster than the market** thanks to
  - consistent implementation of the strategic programs,
  - further expansion and optimisation of the pharmacy network and the Verfora product portfolio.
- Galenica expects to increase its return on sales (ROS) in the medium term, i.e. in three to five years (2024 – 2026),
  - to **over 8%** in the **Products & Care** segment
  - and to **up to 2%** in the **Logistics & IT** segment.
- Galenica continues to pursue a policy of **at least stable dividends** that grow in line with results and continues to aim for **net debt** in the order of +/- 2 × EBITDA (adjusted for leasing in accordance with IFRS 16) in the medium term.
Step by step upwards
Determined despite persistent COVID-19 headwinds
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