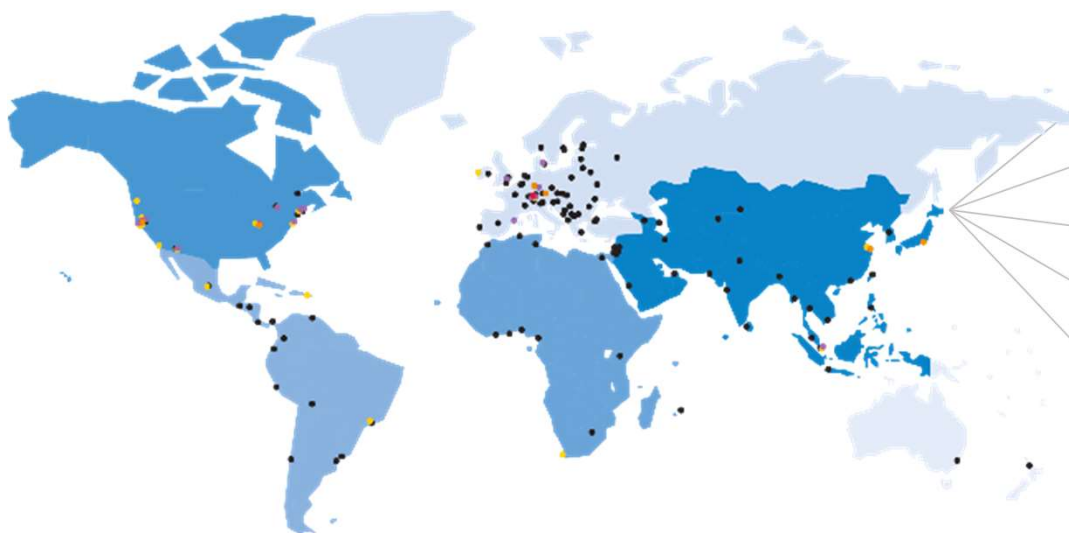

Roche Perspective on Global Access to Cancer Therapies, including Immuno-Oncology

Philip Anderson & Frank Loeffler



Roche is a global pioneer in personalised healthcare

Innovation: it's in our DNA



CHF 11.7 billion R&D core investment

29 R&D sites worldwide *

CHF 61.5 billion sales

23 manufacturing sites worldwide*

97,735 employees worldwide

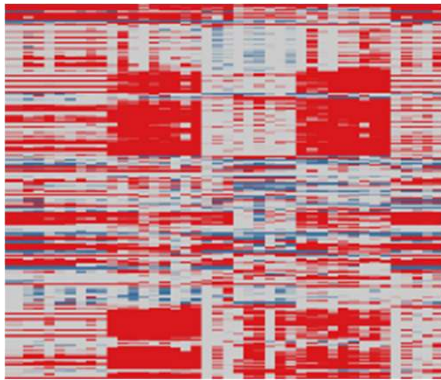
#1 R&D investor in healthcare**

Among **top 10** R&D investors across industries

*Pharmaceuticals and Diagnostics **R&D ranking of the world top 2500 companies, 2019 edition

Roche Group: what makes us different

Evolving the practice of medicine and patient care worldwide

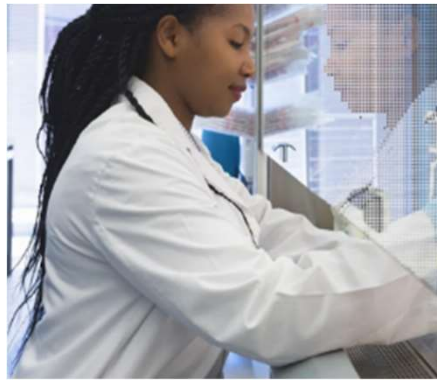


Excellence in science

31+7

31 FDA breakthrough **therapy** designations

7 FDA breakthrough **device** designations



Personalised healthcare

#1

in **biotechnology**
market leader in **in-vitro**
diagnostics with a full
range of solutions



A culture of collaboration

60+

countries **worldwide** have
developed health impact
plans



Delivering sustainable value

120+

years of combining business
and science to **improve**
lives

Roche Group: Development Pipeline Phase I + II

Phase I (45 NMEs + 17 AIs)

RG6026	glofitamab combos	heme tumors	RG7769	PD1 x TIM3	solid tumors
RG6058	tiragolumab combos	heme & solid tumors	RG7802	cibisatamab ± T	solid tumors
RG6076	CD19-4-1BBL	heme tumors	RG7827	FAP-4-1BBL + T	solid tumors
RG6115	TLR7 agonist (4)	HCC	RG7828	mosunetuzumab combos	heme tumors
RG6139	PD1 x LAG3	solid tumors	RG7876	selicrelumab combos	solid tumors
RG6160	FcRH5 x CD3	r/r MM	CHU	FIXa x FX	hemophilia
RG6171	SERD (3)	ER+/HER2- mBC 1L	CHU	glypican-3 x CD3	solid tumors
RG6180	iNeST*± T	solid tumors	CHU	codrituzumab	HCC
RG6185	belvarafenib (pan-RAF inh)+Cotellic	solid tumors	CHU	CD137 switch antibody	solid tumors
RG6194	HER2 x CD3	BC	CHU	-	solid tumors & endometriosis
RG6279	PD1-IL2v	solid tumors	SQZ	PBMC vaccine	solid tumors
RG6286	NME	colorectal cancer	RG6151	-	asthma
RG6290	MAGE-A4 ImmTAC	solid tumors	RG6244	-	asthma
RG6292	CD25 MAb	solid tumors	RG6287	-	IBD
RG6296	BCMA x CD16a	r/r MM	RG6418	NLRP3 inh	inflammation
RG6323	IL15/IL15Ra-Fc	solid tumors	RG6315	NME	systemic sclerosis
RG6330	KRAS G12C	solid tumors	RG7835	IgG-IL2	autoimmune diseases
RG7440	ipatasertib + Taxane + T	TNBC	RG6084	-	HBV
	ipatasertib + rucaparib	mCRPC, solid tumors	RG6346	HBV siRNA	HBV
RG7446	ipatasertib	prostate cancer, pretreated	RG6091	UBE3A LNA	Angelman syndrome
	Morpheus platform	solid tumors	RG6102	brain shuttle gantenerumab	Alzheimer's
	T + Avastin + Cotellic	2/3L CRC	RG6237	-	neuromuscular disorders
	T ± Avastin ± chemo	HCC, GC, PaC	RG7637	-	neurodevelopmental disorders
	T + anti-CD20 combos	heme tumors	RG7816	GABA Aα5 PAM	autism
	T + K/HP	HER2+ BC	RG6179	-	DME
	T + rucaparib	ovarian cancer	RG6247	4D-R110	choroideremia
	T + CD47 MAb	r/r AML	RG7921	-	nAMD
RG7461	T + Venclexta	maintenance 1L ES-SCLC	4D-MT	4D-R125	X-linked retinitis pigmentosa
	simlukafusp alfa combos	solid tumors	CHU	PTH1 recep. ago	hypoparathyroidism
RG7601	Venclexta + AMG176	AML	CHU	-	hyperphosphatemia
	Venclexta ± azacitidine	r/r MDS			
	Venclexta + gilteritinib	r/r AML			

*Individualized Neoantigen Specific Immunotherapy; T=Tecentriq

Status as of October 15, 2020

	New Molecular Entity (NME)	CardioMetabolism
	Additional Indication (AI)	Neuroscience
	Oncology / Hematology	Ophthalmology
	Immunology	Other
	Infectious Diseases	

Phase II (21 NMEs + 14 AIs)

RG6171	SERD (3)	neoadjuvant HR+ BC
RG6180	iNeST* + pembrolizumab	malignant melanoma
RG6357	SPK-8011	hemophilia A
RG6358	SPK-8016	hemophilia A with inhibitors to factor VIII
RG6058	tiragolumab + T	NSCLC
	tiragolumab + T	cervical cancer
RG7446	Tecentriq	SC NSCLC
RG7601	Venclexta + fulvestrant	2L HR+BC
	Venclexta + carfilzomib	r/r MM t(11:14)
CHU	Oncolytic Type 5 adenovirus	esophageal cancer
RG6149	ST2 MAb	asthma
RG6173	anti-tryptase	asthma
RG6354	rhPTX-2 (PRM-151)	myelofibrosis
	rhPTX-2 (PRM-151)	idiopathic pulmonary fibrosis
RG7845	fenebrutinib	RA
RG7880	IL22-Fc	inflammatory diseases
RG6149/RG7880	ST2 MAb or IL22-Fc	COVID-19 pneumonia
NOV	TLR4 MAb	autoimmune diseases
RG7854+RG7907	TLR7 ago(3) + CpAM (2)	HBV
RG6413+	REGN-COV2 nAbs	COVID-19+ adult-ambulatory
RG6412	REGN-COV2 nAbs	COVID-19+ adult-hospitalised
RG7992	FGFR1 x KLB MAb	NASH
IONIS	ASO factor B	IgA nephropathy
RG6100	semorinemab	Alzheimer's
RG6356	microdystrophin (SRP-9001)	DMD
RG7412	crenezumab	familial Alzheimer's healthy pts
RG7906	ralmitaront	schizophrenia
RG7935	prasinezumab	Parkinson's
RG6147	-	geographic atrophy
RG6367	SPK-7001	choroideremia
RG7774	-	retinal disease
IONIS	ASO factor B	geographic atrophy

RG-No - Roche/Genentech
CHU - Chugai managed
IONIS - IONIS managed

SQZ - SQZ Biotechnology managed
NOV - Novimmune managed
4D-MT - 4D-MT managed

Roche Group: Development Pipeline Phase III



Phase III (12 NMEs + 34 AIs)

RG6013	Hemlibra	mild to moderate hemophilia A	RG7446/ RG6268	Tecentriq bTMB-high or entrectinib ROS1+	1L NSCLC
RG6058	tiragolumab + T + chemo	1L SCLC	RG7601	Venclexta	r/r MM t(11:14)
	tiragolumab + T	1L PD-L1+ NSCLC	RG7853	Venclexta + azacitidine	1L MDS
	tiragolumab + T	locally advanced esophageal cancer		Alecensa	ALK+ NSCLC adj
RG6107	tiragolumab + T	stage III unresectable 1L NSCLC	RG1569	Actemra	COVID-19 pneumonia
	crovalimab	PNH	RG1569	Actemra + remdesivir	COVID-19 pneumonia
RG6114	mPI3K alpha inh	1L HR+ mBC	RG3648	Xolair	food allergy
RG6171	SERD (3)	ER+/HER2- mBC	RG7159	Gazyva	lupus nephritis
RG7440	ipatasertib + abiraterone	1L CRPC	RG7413	etrolizumab	Crohn's
	ipatasertib + chemo	1L TNBC/HR+ BC	RG6152	Xofluza	influenza, hospitalized pts
	ipatasertib + fulvestrant + palbociclib	1L HR+ mBC		Xofluza	influenza, pediatric (0-1 year)
	ipatasertib + Tecentriq + taxane	1L TNBC		Xofluza	influenza direct transmission
RG7596	Polivy	1L DLBCL	RG6413+ RG6412	REGN-COV2 nABs	SARS-CoV2 prophylaxis
RG7446	Tecentriq	NSCLC adj	RG1450	gantenerumab	Alzheimer's
	Tecentriq	NMIBC, high risk	RG6042	tominersen	Huntington's
	Tecentriq	RCC adj	RG6321	port delivery system with ranibizumab	wAMD
	Tecentriq + cabozantinib	advanced RCC		port delivery system with ranibizumab	DME
	Tecentriq + cabozantinib	2L NSCLC		port delivery system with ranibizumab	DR
	T ± chemo	SCCHN adj	RG7716	faricimab	DME
	Tecentriq	HER2+ BC neoadj		faricimab	wAMD
	T + capecitabine or carbo/gem	1L TNBC			
	T + paclitaxel	TNBC adj			
	T + nab-paclitaxel	TNBC neoadj			
	T + Avastin	HCC adj			
	T ± chemo	1L mUC			

T=Tecentriq

Registration (5 NMEs + 11 AIs)

RG6264	Phesgo ¹ Perjeta + Herceptin FDC SC	HER2+ BC
RG6396	Gavreto (pralsetinib) ¹	RET+ NSCLC
	Gavreto (pralsetinib) ²	RET+ MTC
RG7446	Tecentriq Dx+ ¹	1L sq + non-sq NSCLC
	Tecentriq+ Avastin ¹	1L HCC
RG7601	Venclexta + azacitidine	1L AML
RG7853	Alecensa	1L NSCLC Dx+
RG3648	Xolair ³	nasal polyps
	Xolair ²	asthma home use
RG6152	Xofluza ¹	influenza
	Xofluza ¹	influenza, high risk
	Xofluza	influenza post exposure prophylaxis
	Xofluza ²	influenza, pediatric (1-12 yrs)
RG1594	Ocrevus ³	short infusion RMS & PPMS
RG6168	Enspryng (satralizumab) ¹	NMOSD
RG7916	Evrysdi (risdiplam) ¹	SMA

¹ Approved in US, filed in EU

² Filed in US

³ Filed in US, approved in EU

New Molecular Entity (NME)
Additional Indication (AI)
Oncology / Hematology
Immunology
Infectious Diseases

CardioMetabolism
Neuroscience
Ophthalmology
Other

Oncology portfolio overview including immuno-oncology



BREAST



GYNECOLOGY



LUNG /
DISEASE AGNOSTIC



SKIN



GASTRO-
INTESTINAL



GENITO-
URINARY



HEMATOLOGY



Roche is a pioneer in Personalised Healthcare

Evolving synergies across Pharma and Diagnostics

Past

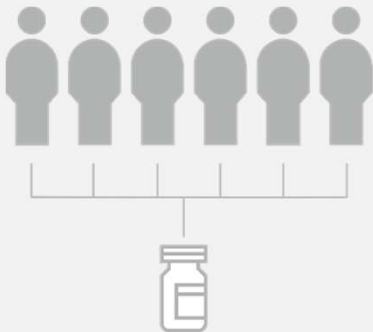
Companion diagnostics

Present

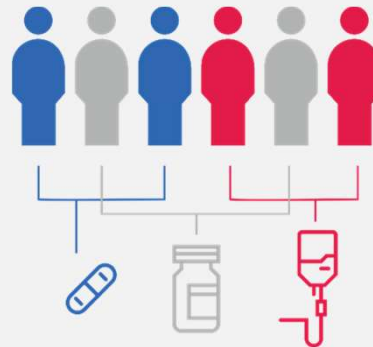
*Meaningful data and
advanced analytics*

Future

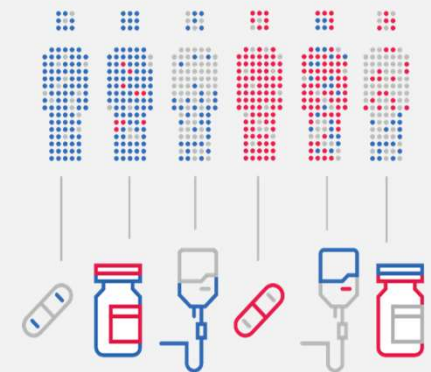
Blockbuster drugs



Targeted medicines



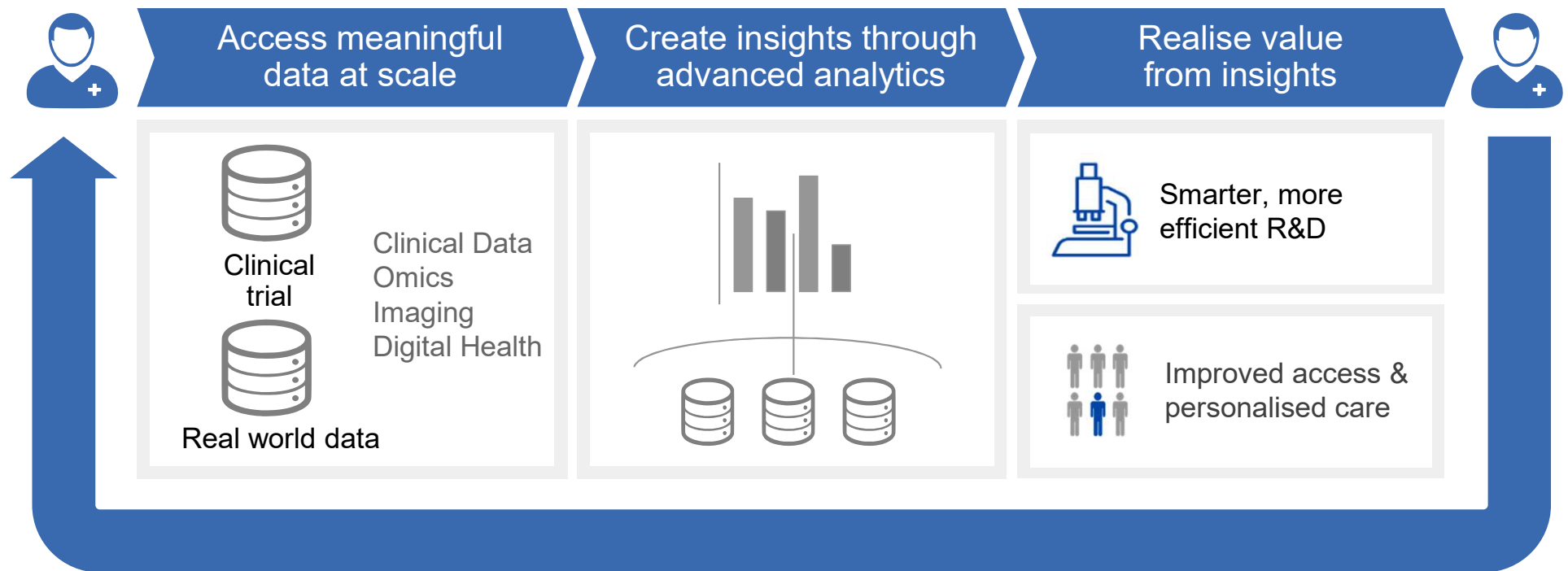
Individualised treatments



- Smarter, more efficient R&D
- Improved access and truly personalised care







Our personalised healthcare vision

Transform R&D and personalised patient care



Our business in Africa is focused on meaningful outcomes

Doing now what improves the future for African patients

	Key Topic		How do we do it
	Organizational set-up		Work as OneRoche – flexible and agile use of resources (Pharma/Dia, Affiliates/Distributors).
	Improve Standard of Care. Personalised Healthcare (PHC) is our vision		Shape and improve the standard of care in Africa in collaboration with stakeholders and policy makers. Future PHC is the vision.
	Funding		Co-create sustainable reimbursement.
	Innovation		Launches of new medicines, strengthen R&D capabilities and clinical trial infrastructure.
	Digital Transformation & Policy		Shape the healthcare ecosystem - harness the potential of digital, internally and externally.

International Cancer Institute (ICI) Kenya partners with Roche

Creating an important pilot for the PHC vision in Africa

1

- **Sub-Saharan Africa (SSA) Vision:** better outcomes for more patients in SSA through **access to precise diagnostics and innovative care** without financial burden

2

- **Capacity Building:** 15 oncology training courses reaching about **500 HCPs in oncology care from various African countries**

3

- **Point-of-Care Screening programs:** breast and cervical cancer
- **Screenings** in hospitals with **large patient reach**

4

- **Policy engagement:** facilitate approvals of diagnostics and medicines, reimbursements of tests and medicines
- **Healthcare Infrastructure:** R&D and clinical trial readiness



Doing now what patients need next

Abstract



Roche is a global pioneer in pharmaceuticals and diagnostics focused on advancing science to improve people's lives.

For more than 50 years, Roche has been developing medicines with the goal to redefine treatment in oncology. Today, Roche is investing more than ever in our effort to bring innovative treatment options that help a person's own immune system fight cancer.

The aim of personalised cancer immunotherapy (PCI) is to provide patients and physicians with treatment options tailored to the specific immune biology associated with a person's individual tumour. The purpose is to inform treatment strategies that provide the greatest number of people with a chance for transformative benefit. PCI encompasses the search for reliable biomarkers that correlates with clinical benefit either as a monotherapy or in combination, and across a broad range of tumour types. The Roche PCI research and development programme comprises more than 20 investigational candidates, ten of which are in clinical trials.

Roche is the world's largest biotech company, with truly differentiated medicines in oncology, immunology, infectious diseases, ophthalmology and diseases of the central nervous system. Roche is also the world leader in in vitro diagnostics and tissue-based cancer diagnostics, and a frontrunner in diabetes management. The combined strengths of pharmaceuticals and diagnostics under one roof have made Roche the leader in personalised healthcare – a strategy that aims to fit the right treatment to each patient in the best way possible.

Founded in 1896, Roche continues to search for better ways to prevent, diagnose and treat diseases and make a sustainable contribution to society. Twenty-nine medicines developed by Roche are included in the World Health Organization Model Lists of Essential Medicines, among them life-saving antibiotics, antimalarials and cancer medicines. Roche has been recognised as the Group Leader in sustainability within the Pharmaceuticals, Biotechnology & Life Sciences Industry eight years in a row by the Dow Jones Sustainability Indices.

The Roche Group, headquartered in Basel, Switzerland, is active in over 100 countries and in 2015 employed more than 91,700 people worldwide. In 2015, Roche invested CHF 9.3 billion in R&D and posted sales of CHF 48.1 billion. Genentech, in the United States, is a wholly owned member of the Roche Group. Roche is the majority shareholder in Chugai Pharmaceutical, Japan. For more information, please visit www.roche.com.