DIACEUTICS
PHARMA READINESS FOR PERSONALIZED MEDICINE
SUMMARY REPORT
2016

Prepared using the Diaceutics Method ®

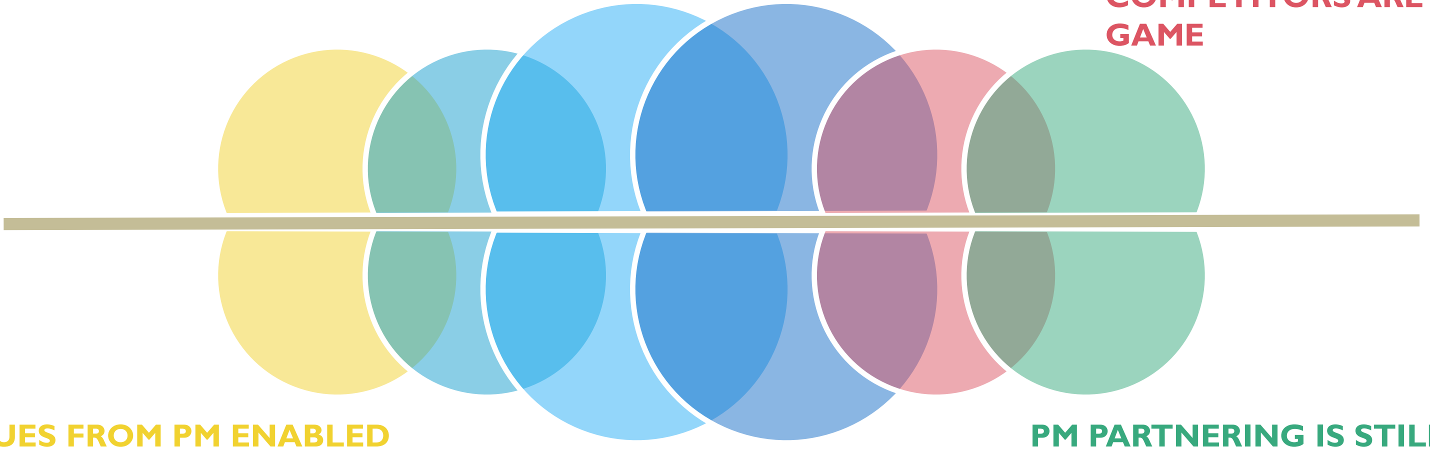
KEY TAKEAWAYS FROM THIS YEAR'S REPORT

Diaceutics Pharma Readiness for Personalized Medicine (PM) Benchmark Report is a quantitative and qualitative assessment of Pharma Readiness to operate in a personalized medicine marketplace. The report relies on data and information in the public domain.

PM IS NOW THE PREDOMINANT R&D BUSINESS MODEL

PM LEADERSHIP BECOMES INCREASINGLY HARDER WITH ONLY A SMALL NUMBER OF COMPANIES IN CONTENTION

EXTERNAL COMMUNICATION ON PM CONTINUES TO RISE BUT IT IS CLEAR SOME COMPETITORS ARE NOT IN THE GAME



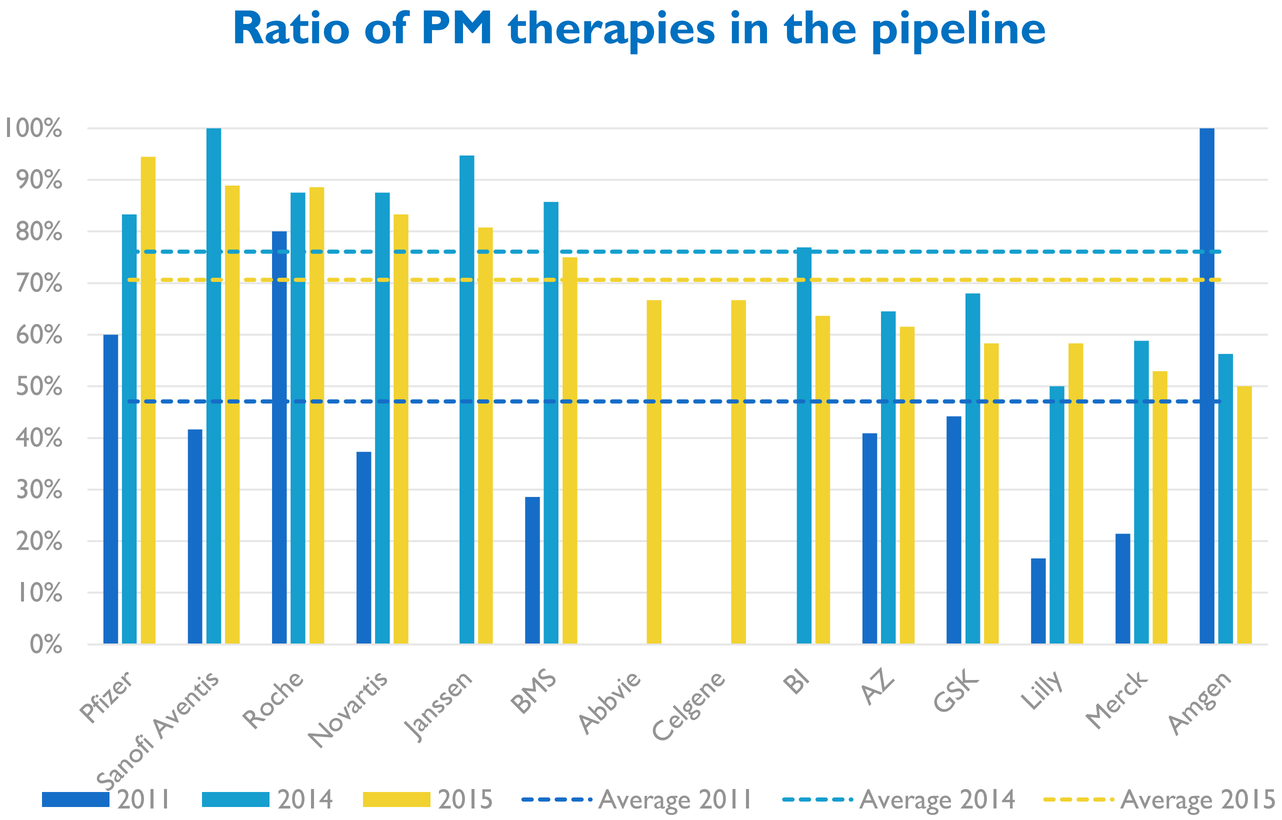
REVENUES FROM PM ENABLED DRUGS CONTINUE TO RISE DRAMATICALLY DISPROVING THE PERCEPTION THAT PM IS SMALL BUSINESS

GREATEST PM COMPETITION IS IN ONCOLOGY BUT COMPETITORS ARE DEPLOYING PM IN OTHER INDICATIONS

PM PARTNERING IS STILL THE PREFERRED TECHNOLOGY APPROACH BUT ONLY ROCHE HAS CRITICAL MASS IN SOME KEY AREAS

Pharma pipeline analysis suggests PM is now the predominant business model

Almost ¾ of the late stage pipeline is either associated with a known biomarker, a biomarker/Dx strategy is already in place or the therapy could benefit from a Dx strategy.



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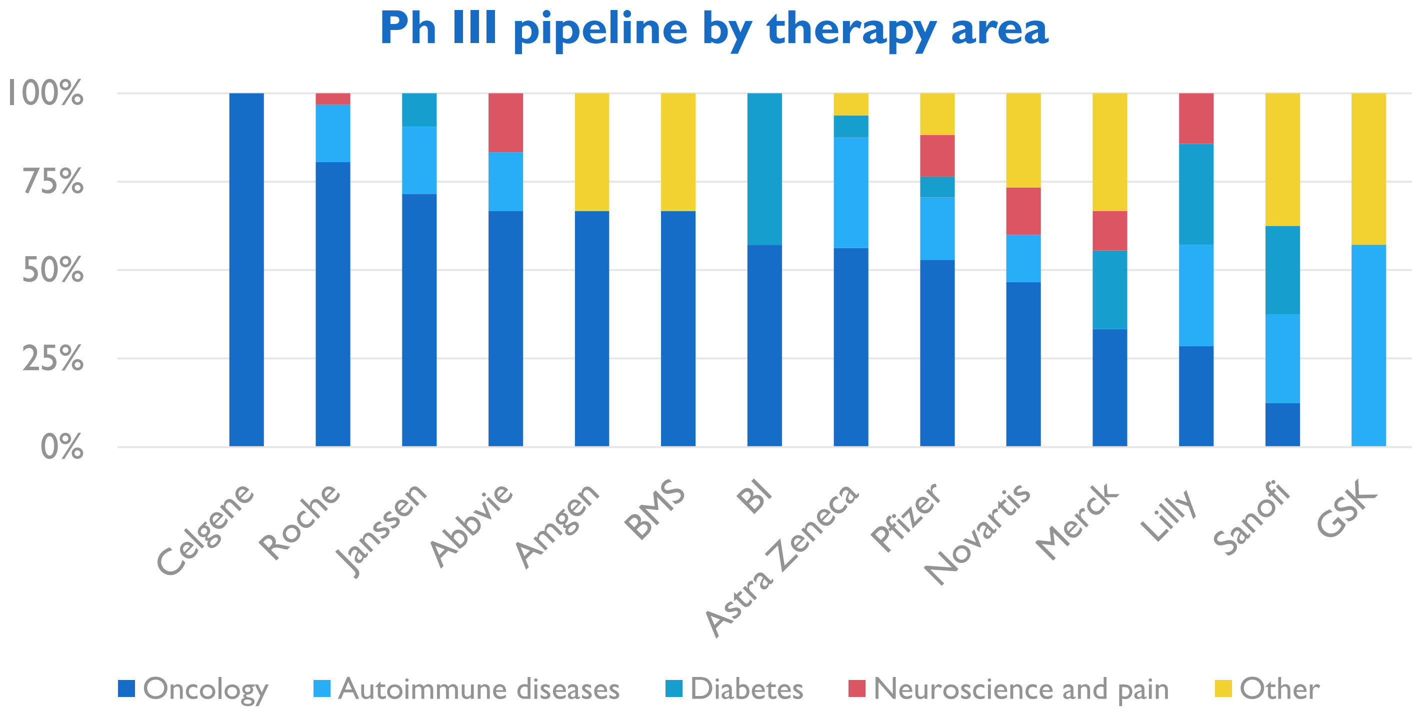
A focus on oncology by some competitors makes them obvious PM players but others are diversifying their PM approach



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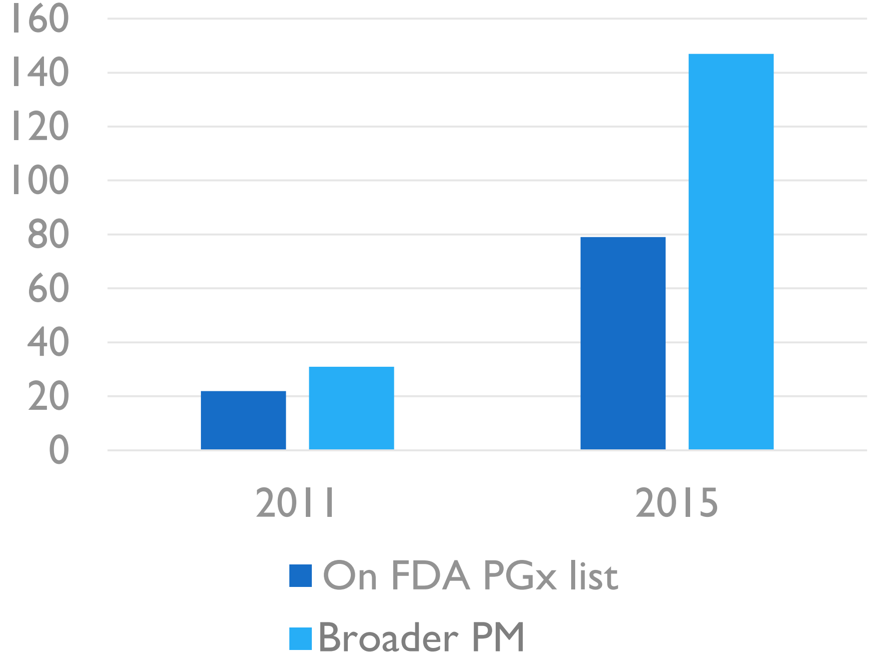
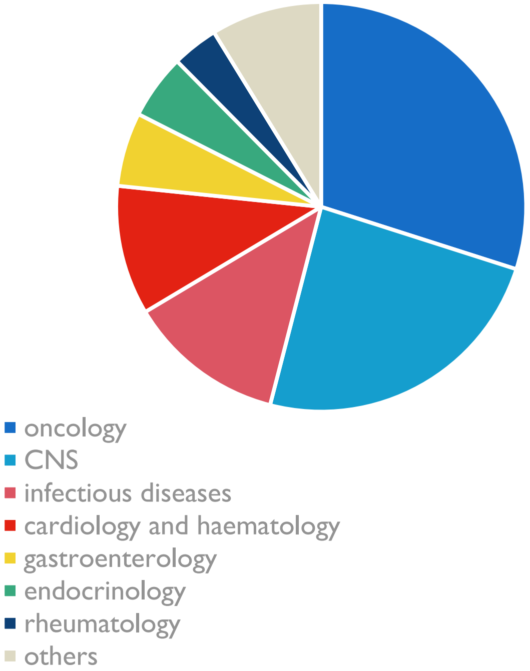
Oncology still dominates marketed PM therapies but other areas are growing quickly

Number of PM therapies on the market



Broader PM = Therapies which are enabled by a PM strategy

2015 List of therapy areas for PM Therapies on the market



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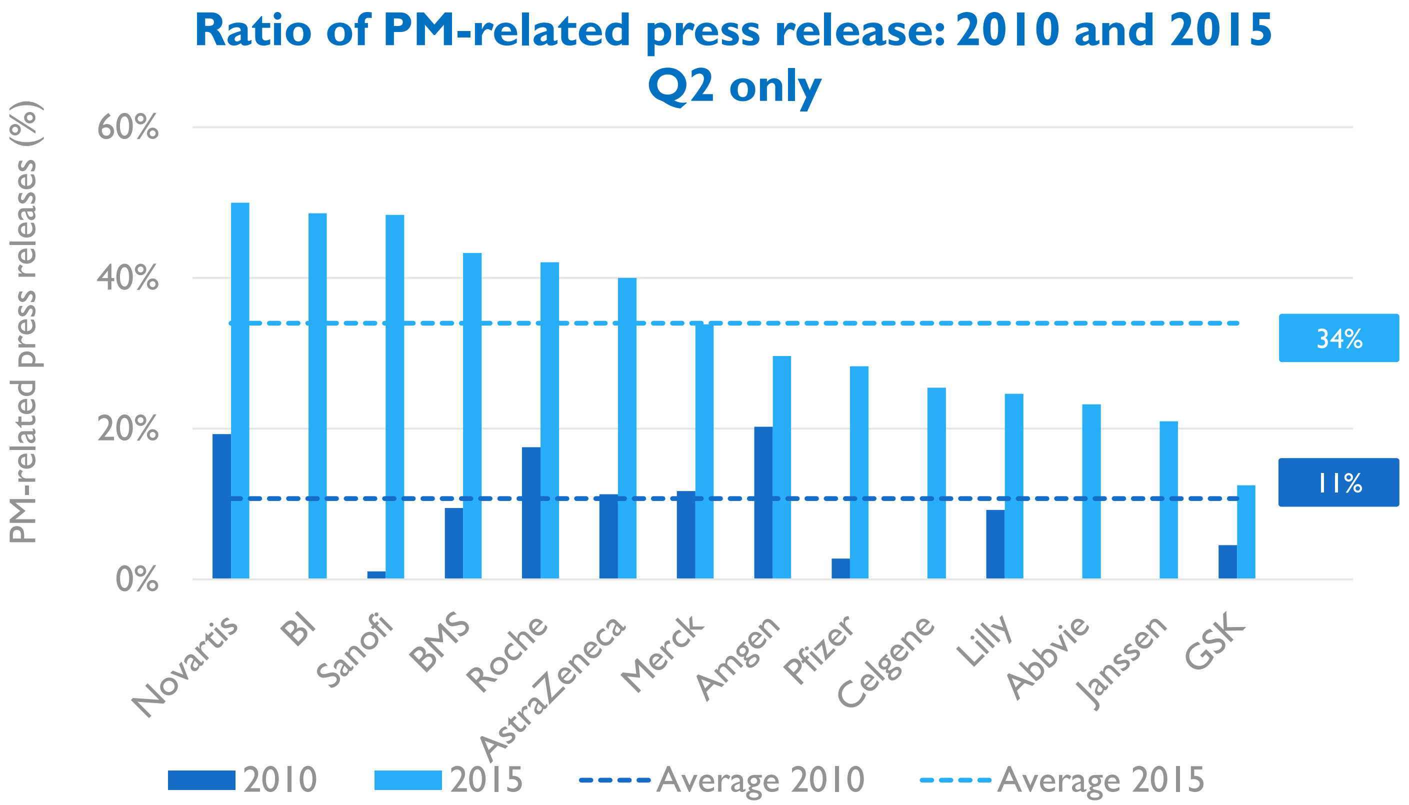
External Pharma communication about PM continues to rise although some competitors are still less vocal

1/3 of all press releases in 2015 are related to specific PM therapies or PM in general



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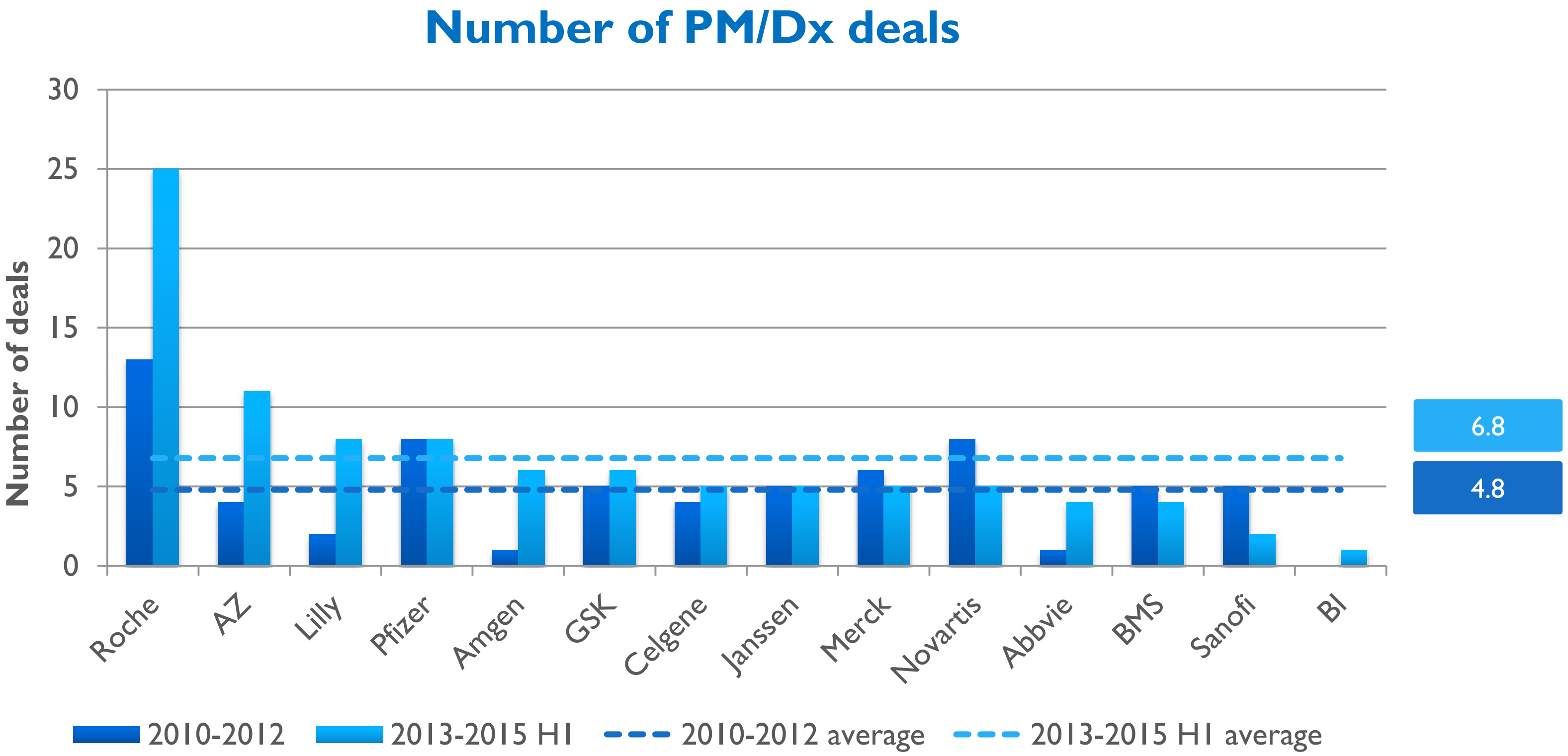
Roche far outstrips other competitors with its recent partnering strategy



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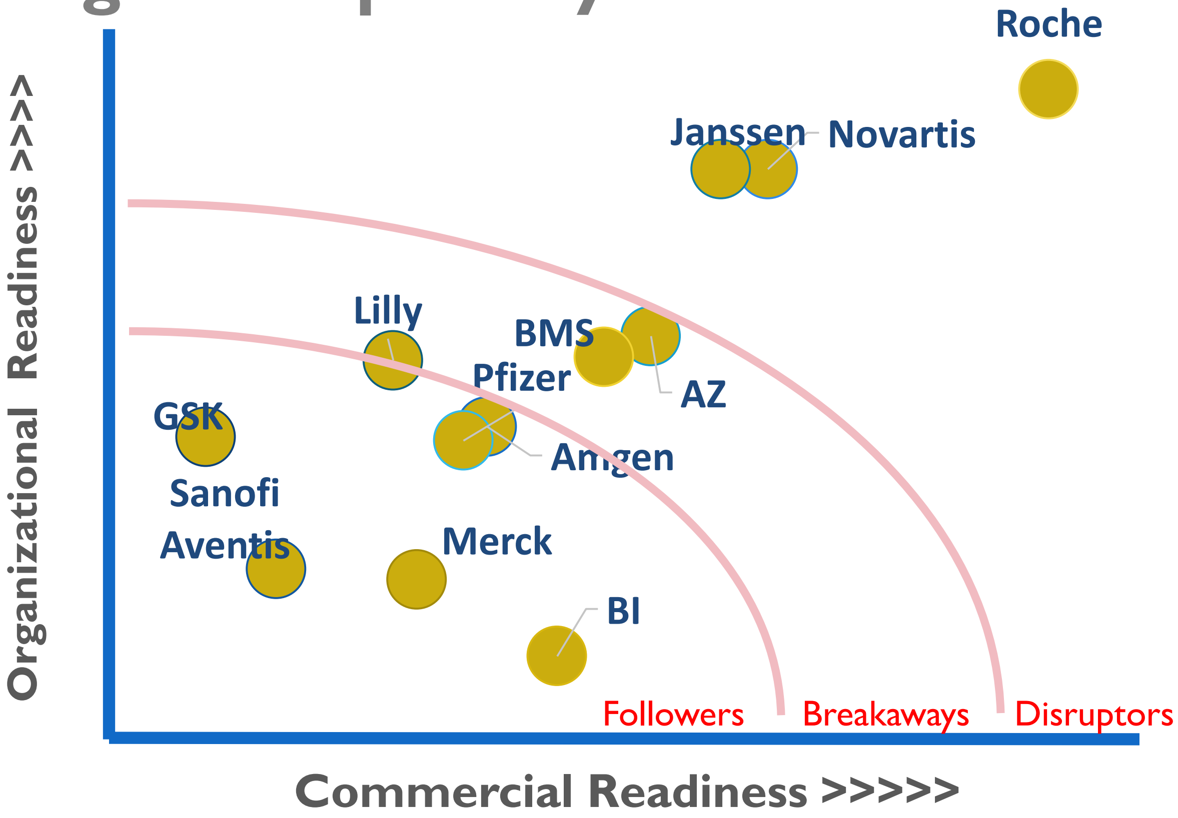
When we analyze all the key factors in our relative competitive index only a small number of companies are building the capability to lead

Organizational Readiness Factors
- *PM Ph3 Pipeline*
- *Internal PM/Dx Division*
- *Rx/Dx Partnerships*

Commercial Readiness Factors
- *PM Revenues*
- *Channel Control*
- *# PM Integrated Brands*

Diaceutics Pharma Readiness Report integrates six key externally observed factors which are weighted. The Report illustrates the competitive position relative to peers.



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INCLUSIVE IN THE FULL PM READINESS REPORT

TABLES – CHARTS

1. Post-2010 therapy launches with pharmacogenomic biomarkers and with companion diagnostics from the 14 'Companies in Focus'
2. Therapies on the FDA PGx list in 2015 – by therapy area
3. Therapies 'retrofitted' with biomarkers post-2010 – by biomarker type
4. Size and composition of late stage pharmaceutical pipeline from the 14 'Companies in Focus'
5. Ratio and number of PM therapies in the late stage pipeline – by company
6. Late stage pipeline of the 14 'Companies in focus' – by therapy area
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10. Total sales of PM therapies from the 14 'Companies in Focus'
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16. Number of PM/Dx-related deals – by company
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21. Pharma readiness for personalized medicine 2015 – ranking

DIACEUTICS FULL PM READINESS REPORT INCLUDES A COMPREHENSIVE QUANTITATIVE BENCHMARKING OF PHARMA PIPELINES, DEAL FLOW & CORPORATE PM ACTIVITIES.

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What We Do

Diaceutics is a global group of experts from the laboratory, diagnostic and pharmaceutical industries. Our goal is to help pharmaceutical companies to integrate diagnostic testing into their treatment pathways. We are empowered through a real-time flow of testing data from our global laboratory network, which we use to help our pharma clients to understand and leverage the diagnostic landscape.

Our Clients

Diaceutics Solutions

01

Understand Dx Market

Data driven **insight** to help you identify specific risks and opportunities for your test with comprehensive recommendations.

02

Build Dx Plan

Build the Dx plan that will ensure the diagnostic is serving needs of prescribing decisions and not viewed as a barrier

03

Implement Dx Plan

Leverage on the ground experience to **implement Dx tactical plan** in key markets

04

Dx Tracking

Quarterly Lab Testing Data, Physician Mapping, Dx landscape