Roche and Genentech Company Presentation

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The Roche Group: an innovation-led company

Why we make a good partner

What we are looking for from you
The Roche Group
A leading healthcare company dedicated to innovation in a sustainable way

1896
Founded in Basel
Family still holds majority stake

61.5 bn
Sales 2019 (CHF)

#1
R&D investor in healthcare

97’735
Employees worldwide

63,000,000
people treated worldwide with our medicines in 2019

Genentech1, first publicly-owned Biotech

Lasting…
>30 medicines on World Health Organization List of Essential Medicines

… and Sustainable
Among top companies in Dow Jones Sustainability Index (Life Sciences Sector) for 10 consecutive years

31
FDA Breakthrough Designations

1 Genentech became a full member of the Roche group in March 2009
The leader in personalized healthcare

Optimally positioning us for the future

Combining pharmaceuticals and diagnostics under one roof, together with deep know-how in molecular biology and data science, make Roche a unique partner to drive the next step in the evolution of healthcare.

Leader in Diagnostics

Leader in Pharma

Diagnosis  Decision Support  Therapy  Therapy monitoring
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Active partnerships across the globe

Over 220 partnerships across North America, Europe and Asia Pacific
Our approach to Partnering in the Pharma industry

We value external innovation and bring our best experts to the table

Our four-step partnering process

- Identify the areas of interest
- Search the latest developments
- Start the first conversations
- Maintain a lasting partnership
Because a great idea is a great idea…
…no matter where it comes from

∼ 50% of R&D pipeline involve a partnership

∼ 40% of total Pharma sales generated from partnered or in-licensed products
Roche launched 16 new molecules since 2011
11 out of the 16 are partnered medicines
We believe in flexibility of deal structures
Tailored for mutual value and partners’ wants and needs
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What we are looking for from you

Why we make a good partner
### What we are looking for in a partnering opportunity

*Innovative science with the potential to make a significant difference for patients*

#### What we are focusing on
- High disease burden
- Novel targets
- Potential for first- or best-in-class molecules
- Novel enabling modalities

#### What we don’t do
- Generics, biosimilars
- OTCs
- Animal Health

#### What we are looking for
- Clear connection between MoA and pathobiology
- Robust data linking MoA, PK and PD
- Biomarker strategy
Our focus areas

Seeking great science across multiple therapeutic areas

### Oncology & Cancer Immunotherapy
- Oncogenic drivers
- Synthetic lethality
- Adaptive and Innate immunity
- Neoantigens
- Stromal biology
- Cell therapies

### Immunology & Infectious Diseases
- GI, Respiratory, Rheumatology
  - Innate, Adaptive, Fibrosis, Tolerance and Tissue Regeneration Targets
- Hep B & Respiratory Viruses
- MDR Gram (-) Infections

### Neuroscience, Ophthalmology & Rare Diseases
- Neurodegeneration
- Neuroinflammation
- Neurodevelopmental
- Pain (non-opioid treatments for chronic pain)
- Retinal diseases and dry eye disease
- Monogenetic rare diseases

### Research Technologies
- Technologies & modalities enabling challenging targets
- Targeted delivery / intracellular delivery
- AI for drug discovery
- Genomic medicine approaches
- Ocular delivery

### Digital & Personalized Healthcare
- Robust data sets
- Advanced Analytics (AI incl. Machine learning and deep learning models)
- Digital and mobile technologies
Roche Pharma Partnering

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Doing now what patients need next