AstraZeneca

40TH ANNUAL GENERAL MEETING

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1 Overview

2 India Market Overview

3 Sustainability

4 Innovation

5 Great Place to Work

What we set out to do

Strategic priorities

1

Achieve Scientific Leadership

2

Return to Growth

3

Be a great place to work

Continued Pipeline Progress

Highlights from the late-stage development

Pipeline News		
Oncology	Imfinzi	SCLC[1]
	Lynparza	ovarian cancer (1st line, BRCAm[2]) pancreatic cancer (BRCAm)
	Trastuzumab Deruxtecan	breast cancer (3rd line, HER2+[3])
	Calquence	CLL[4](relapsed/refractory) CLL (treatment-naïve)
BioPharmaceuticals	Forxiga	T2D[5] CVOT[6]
	Farxiga	T1D[7]
	QternmetXR	T2D
	Lokelma	Hyperkalaemia
	Roxadustat	anaemia of CKD[8]
	BevespiAerosphere	COPD[9]
	BreztriAerosphere	COPD
	Fasenra	Severe asthma (self-administration and auto-injector)

1. Small cell lung cancer 2. Breast cancer susceptibility genes 1/2 mutation 3. Human epidermal receptor 2-positive 4. Chronic lymphocytic leukaemia 5. Type-2 diabetes 6. Cardiovascular (CV) outcomes trial 7. Type-1 diabetes 8. Chronic kidneydisease9. Chronic obstructive pulmonary disease. Status since the last results announcement on 26 April 2019.

Source: https://www.astrazeneca.com/content/dam/az/PDF/2019/h1-2019/20190724%20Prsn%20rdsh.pdf (as on 25th July 2019)

Our Purpose

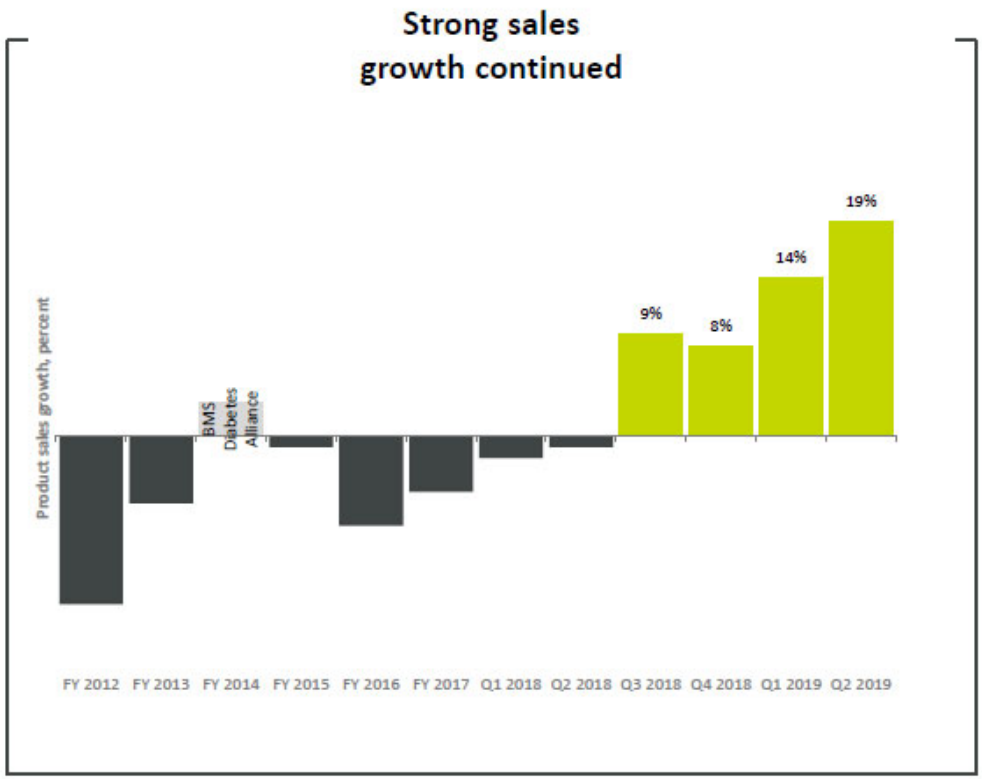
We push the boundaries of science to deliver life-changing medicines

As we enter the next phase in our journey, the fundamentals of our strategy and plans remain unchanged, with Product Sales growth driving improved profitability and the generation of increasing levels of cash.

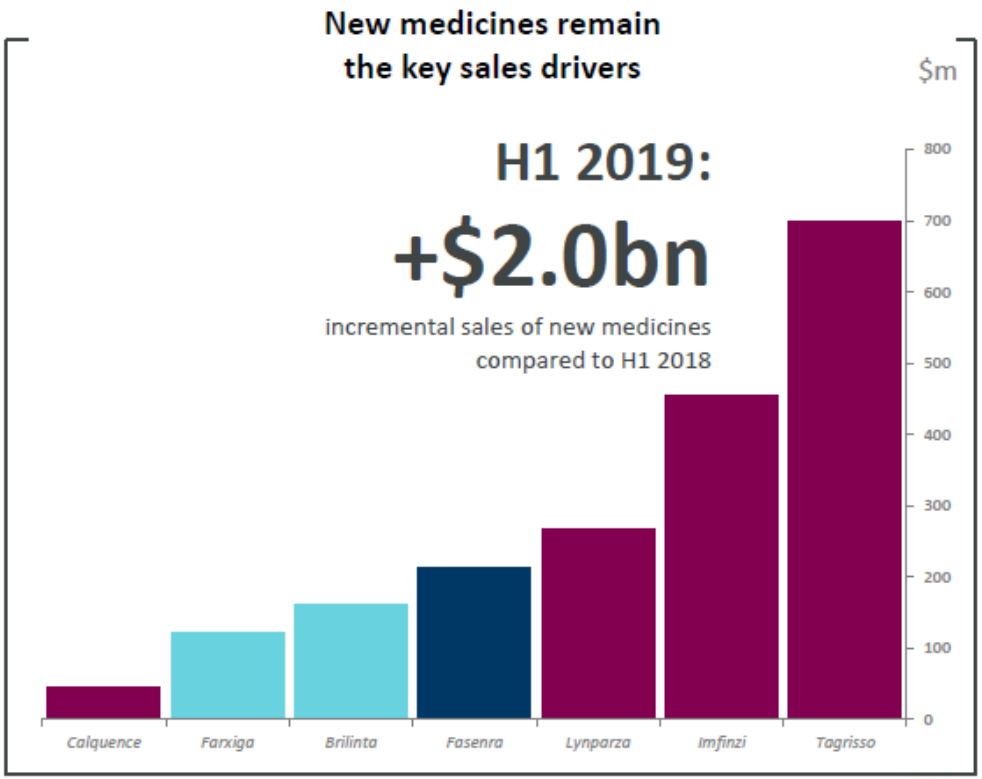
Pascal Soriot, Chief Executive Officer AstraZeneca PLC

Source: CEO Review Annual Report 2018 , Pg 5

AZ Global registers strong sales growth…



Changes (product sales growth) at CER.



Oncology New CVRM Respiratory
Absolute values at CER.

Launches in India are subject to market potential. Regulatory approval and commercial viability.

Source : FY 2018 Presentation, conference call and webcast for investors and analysts

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Positive outlook for the industry fuelled by macro economic factors and strength of domestic demand

Macro-environment[1]

- GDP growth rate projected as ~7.4% for 2019 and ~7.7% for 2020
- Indian economy set to double by 2025 to 5 trillion USD
- Stricter regulatory control with IP laws moving in the right direction and has gained speed.
- Government prioritizing patient access through various measures including price control and retail margin capping

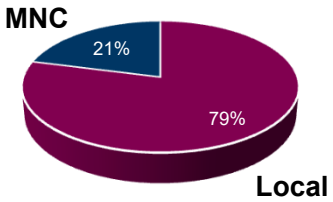
Healthcare (HC) spend[2,3]

- HC spend as % of GDP : 4.1%
- Increase in Government HC spend from ~1.2% to ~2.5% of GDP by 2025
- Ayushman Bharat to cover 100 mn families with health insurance of ~$6K per family per year.
- Source of HC spend by payer

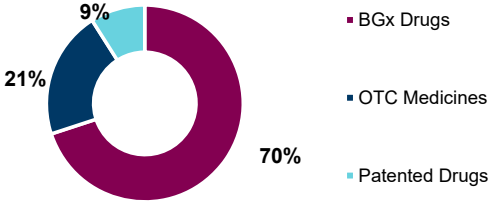
Indian Pharmaceutical Market (IPM)

- IPM expected to grow at ~10% with sales of USD ~28 Bn by 2022[3]

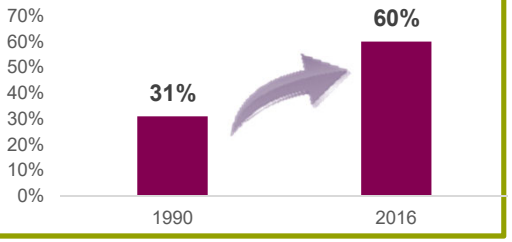
Pharma company revenue share[4]



Revenue share of IPM sub-segments[5]



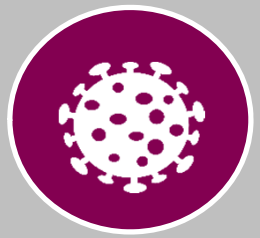
Share of NCDs in total disease burden, India[6]



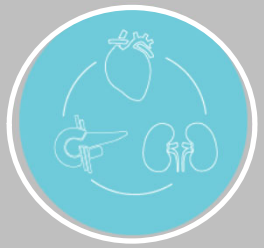
1. IMF's World Economic Outlook report Apr 2018. 2. Healthcare spend – EIU 3. IQVIA Prognosis, March 2019 4. IQVIA Health Database Dec 2018
5. IBEF Pharmaceuticals presentation January 2019, 2015 sub-segment analysis of IPM 6. Institute of Health Metrics and Evaluation-Comprehensive health study in India finds rise of non-communicable diseases

Committed to impacting patient lives over next few years with upcoming launches and pipeline*

ONCOLOGY



CARDIOVASCULAR RENAL AND METABOLIC DISEASE



RESPIRATORY

Late stage pipeline and key lifecycle medicines

Oncology
Lynparza[1], multiple cancers
Imfinzi[1], multiple cancers
Calquence[1] blood cancers
Imfinzi + **treme** multiple cancers

Cardiovascular and Metabolic Diseases
Lokelma hyperkalemia
roxadustat anaemia
Qtern diabetes
Dapa HF diabetes
Dapa CKD Diabetes and Non Diabetes

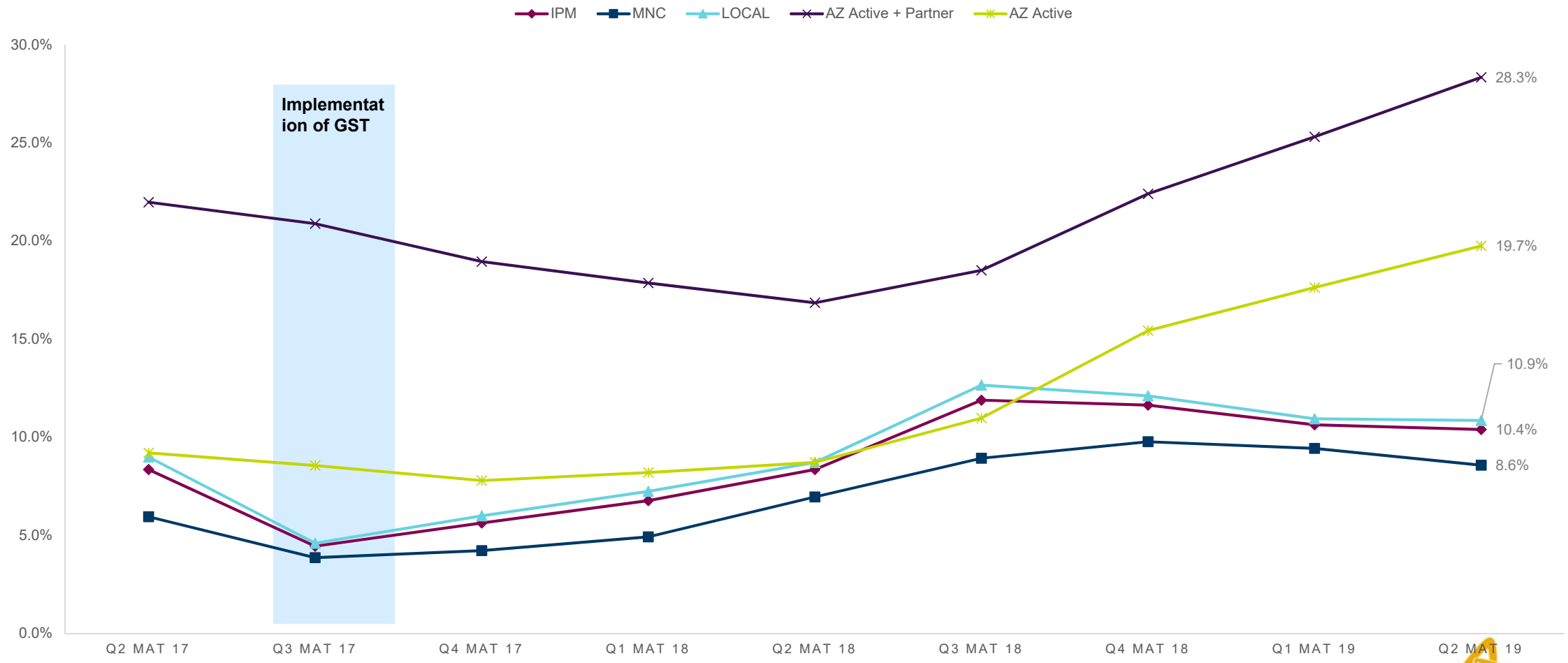
Respiratory
Fasenra severe, uncontrolled asthma / COPD
PT010 COPD / asthma
Bevespi *COPD*

1. Lifecycle development programme

**Launches in India are subject to market potential. Regulatory approval and commercial viability*

AZ Growth vs Market

AZ's active portfolio growing at 2X MAT IPM growth of 10.4%.



Quarters in the above table refer to the Calendar year Quarter

Source: IQVIA TSA MAT June 2019

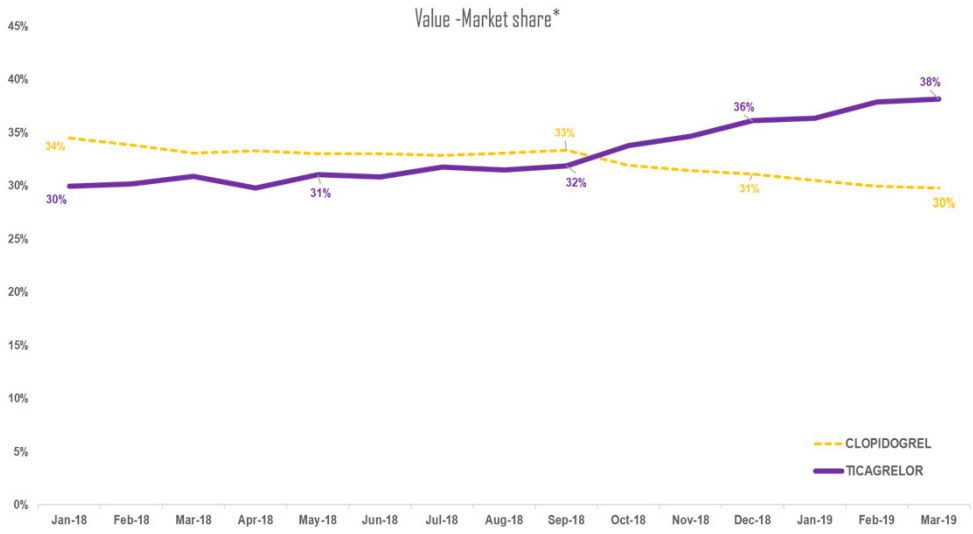
AstraZeneca India: Fastest growing company amongst top-10 MNCs (MAT Jun'19)

Rank	Company	Total revenue $m				Val Market share (MNC Only)			
		MAT Jun'19	GR%	QTR 2'19	GR%	MAT Jun'19	GR%	QTR 2'19	GR%
1	ABBOTT	1186.6	11%	311.4	9%	32.2%	2.3%	32.4%	1.3%
2	GLAXOSMITHKLINE	554.2	10%	137.4	7%	15.0%	1.0%	14.3%	-1.1%
3	PFIZER	398.9	5%	102.2	5%	10.8%	-3.1%	10.6%	-2.4%
4	SANOFI	372.9	7%	96.1	5%	10.1%	-1.5%	10.0%	-2.3%
5	MSD PHARMACEUTICAL	154.2	3%	40.5	6%	4.2%	-5.0%	4.2%	-1.6%
6	NOVARTIS INTL.	148.4	-2%	38.6	-2%	4.0%	-9.7%	4.0%	-9.6%
7	MERCK & Co.	121.0	5%	32.2	5%	3.3%	-3.5%	3.4%	-2.6%
8	BOEHRINGER INGELH.	78.4	18%	21.3	23%	2.1%	8.9%	2.2%	14.4%
9	ASTRAZENECA	69.3	19%	18.7	19%	1.9%	10.0%	1.9%	10.7%
10	JANSSEN	68.9	9%	18.7	17%	1.9%	0.4%	1.9%	8.1%
	TOTAL MNC	**3687.0**	**9%**	**959.8**	**8%**				

SOURCE: IMS June 2019 TSA ; Without Partner

Track record of successful launches in CV-Met TA

TICAGRELOR becomes #1 OAP replacing CLOPI in Value MS



2015
- 19 May 2015 - **Forxiga launch** in India

2016
- **Best launch** in IPM
- **AWACS Marketing excellence award** – New introduction category
- **AA Brand of the Year**

Celebrating
3 years
of improved T2D patient treatment outcomes
in India

2017
- **AWACS Marketing excellence** award – Chronic and Sub-chronic category
- Entry in **Top 200 brands** in IMS

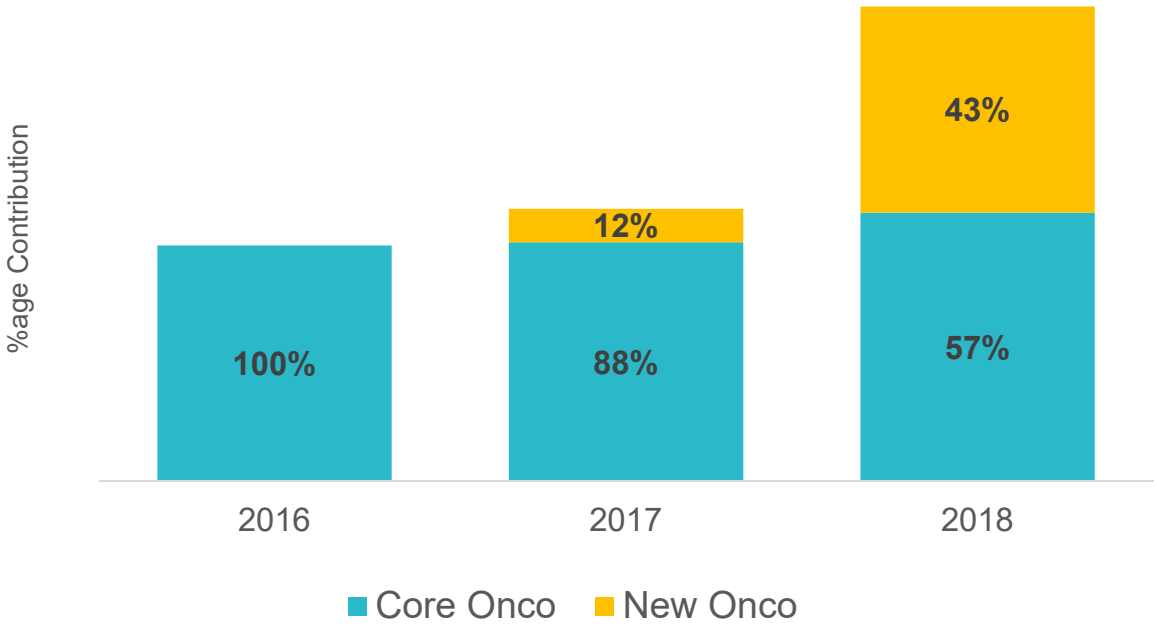
2018
- **Ranks #142** of Top 200 brands in IMS
- Improves 21 ranks from MAT Mar '18

Source- IQVIA MAT Dec '18

Source: IQVIA database MAT March 2018

AZ Oncology ranked No. 6 among MNCs in India

Launch of new innovative portfolio driving growth



Ranked no. 6 * among MNCs; up 4 ranks in 1 yr

* AZ Oncology (MAT Dec'18)

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Sustainability Journey

Spotlight on Access to Healthcare

Our commitment towards issue of NCDs

What we're doing…

60%

Non-communicable diseases account for 60% of deaths In India .

Our strategy for **Access to Healthcare** focuses on three areas:

- Making our medicines **available and affordable**
- **Supporting sustainable** health systems infrastructure
- Promoting disease **awareness and prevention**

40 year celebrations with Community

Early Cancer Screening for Women

Healthy Lung

Early Action in Diabetes

Educating community on risk behaviours associated with NCDs

National Community Service Week in partnership with Plan India to celebrate 40 years in India

The objective was to raise awareness and understanding about the risk behaviours associated with common NCDs among young people from marginalised section of the society through:

- Counselling and training of young people on NCD risk factors
- Sports activities/ yoga sessions/ drawing competitions to embed the messages in a fun & engaging way
- Providing basic health check up for young people

Reached **3000+ young people**

Employee – led; 1000+ employees volunteered

Partnership with **30+ govt/ community schools across 11 states**

Ganga Godavari Early Cancer Screening Programme for Women

The programme was launched in partnership with Indian Cancer Society & CAF India on World Cancer Day (4th Feb 2019) with aim to:

- Conduct specialized check-up of cancer for females in defined population for **oral, cervical and breast cancer** in women
- Create awareness through **health education activities in the** community
- **Robust follow up process** to ensure logical conclusion of each case.

Mayor of Mumbai & Deputy British High Commissioner at the inauguration of the programme

3000+ beneficiaries in Phase 1

4 states identified; focus on high priority districts

Focus on women from underprivileged sections

CAF India Charities Aid Foundation

INDIAN CANCER SOCIETY

AstraZeneca

Collaborations with state governments to improve access and quality of care

EARLY ACTION IN DIABETES

Healthy Lung India

Kerala Health Minister inaugurating the Centre of Excellence in Kerala

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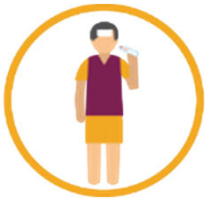
Use of emerging technologies across patient journey

Prevention to Early Diagnosis	Diagnosis & Treatment	Post-treatment
National helpline	Validation of diagnosis	Follow-up treatment
		
Smart diagnostics	Electronic records	Tracking recovery
Self-assessment	Access to specialists	Wearables
Technologies		
Virtual Assistant	Artificial Intelligence	Mobile Apps
Chatbots	Telemedicine	IoT
IoT	Big Data	Machine Learning
	Blockchain	

Early diagnosis → Improved standard of care → Enriched life

Unnati Healthcare 2.0 Innovation Challenge

- 90+ applications received
- 50+ unique screened applications
  - 19 from Bangalore, 9 Delhi NCR, 5 Hyderabad, 4 Chennai, 3 Mumbai, 3 Pune, +11 other cities
  - 1 to 10 employees: 32
  - 11 to 20 employees: 14
  - 20 to 50 employees: 8

Unnati Winner:

ten3T-Smart Patch real-time monitoring device which measures 6 Lead ECG, pulse, respiration, temperature

Predible Health-AI to augment cancer insights

Pathshodh-Point-of-care device capable of performing tests for multiple analytes on a single platform

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Our Great Place to Work Success Levers

AstraZeneca

Engaged & High Performance Workforce

Nurture High Performance : Goals & Deliverables Aligned to AZ Priorities : Rewarding Right KPIs and Levers

OWN YOUR TEAMS:
Empowering Line to Own Engagement –Development Performance for Teams

WELOCITY AWARDS
Recognize & Differentiate Performance

Nurturing our Talent for Future

EMPOWERMENT · EXPERIENCE · EXPLORATION · iDevelop

DEVELOPMENT FOR EVERYONE EVERYDAY

- *Business Acumen & Leadership Development Modules for CL D.E.F*
- *MINDTICKLE*

iDEVELOP CAMPAIGN

- *Speaker Series on Innovation & Growth*
- *iDevelop IDP for Everyone Campaign*

Careers @AZ

AZLA AZDA

Building Inclusive Culture

NURTURING DIVERSE TALENT

INDIA GENDER FOCSSSED CAMPAIGNS

- *Accelerate HER and Flying lessons - Women in leadership Programs*

INDIA CAMPUS HIRE PROGRAMS

NURTURING DIVERSITY OF THOUGHT

#WhatDoUThink:

- **Act Right Now Forums**
- **CLT Roundtables**
- **Skip With BU Leaders**

Simplifying to Scale

Simplifying HR Interface for Field

Enhanced HR Self Service Experience

Field HO Connect Forums : Drive Org Wide Simplification Agendas

Impact of our GPTW Strategy

AstraZeneca

Ahead of IPM in Gender-diversity

WORKING MOTHER & AVTAR
100 BEST COMPANIES FOR WOMEN

Ranked 35th in 100 Best Companies for Women 2018

AZ India Great Place to work certified by GPTW Institute

Great Place To Work.
Certified
OCT 2018–SEP 2019
INDIA

ASIA AREA Country of the year Award

ASIA AREA Cultural Transformation Award

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