

Welcome to AstraZeneca

Gagan Singh

39th Annual General meeting

10th September 2018



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A global, science-led biopharmaceutical company

Productive R&D

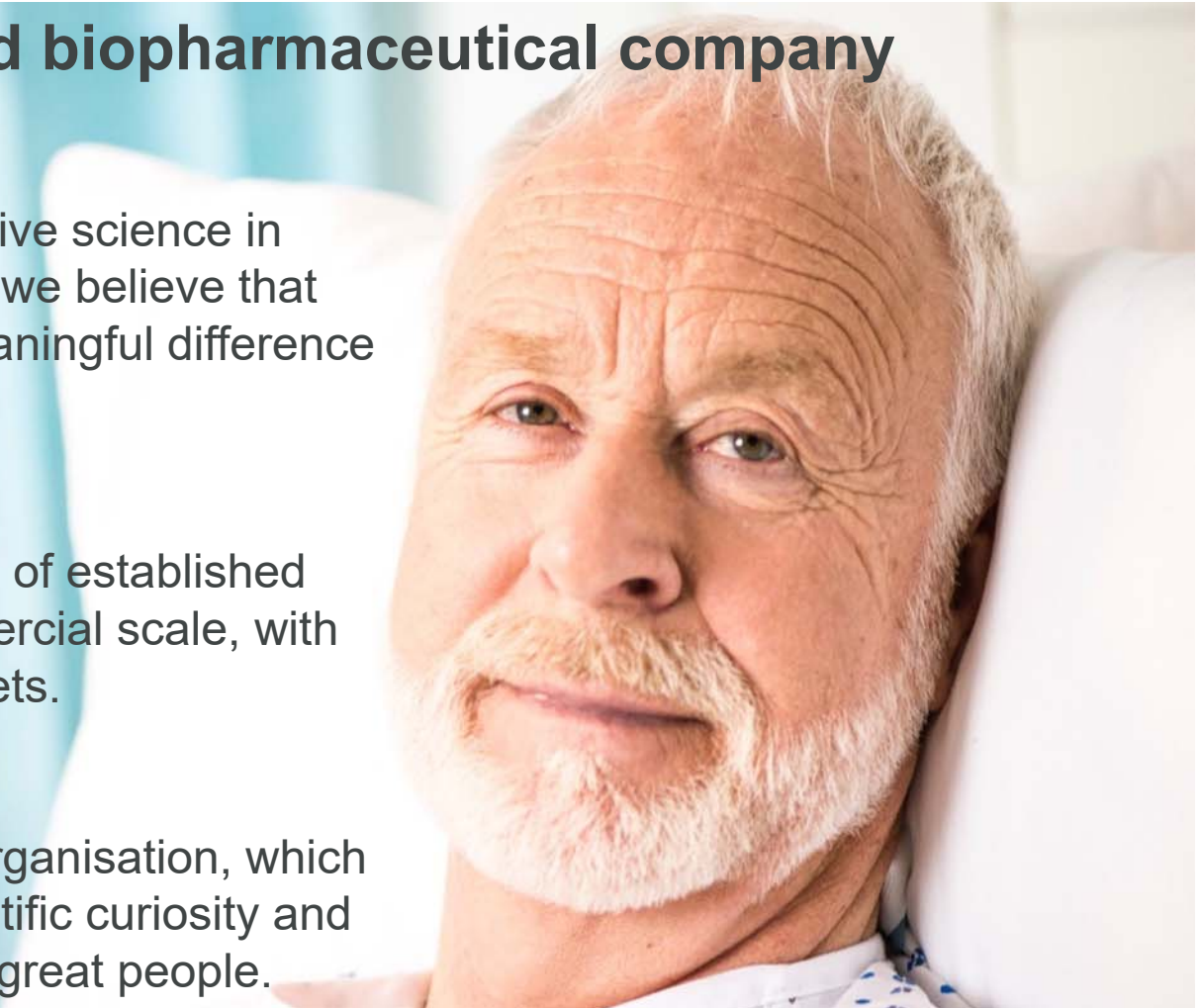
- We are focused on innovative science in three therapy areas where we believe that we can make the most meaningful difference to patients.

Strong business

- We have a stable business of established products and global commercial scale, with strength in emerging markets.

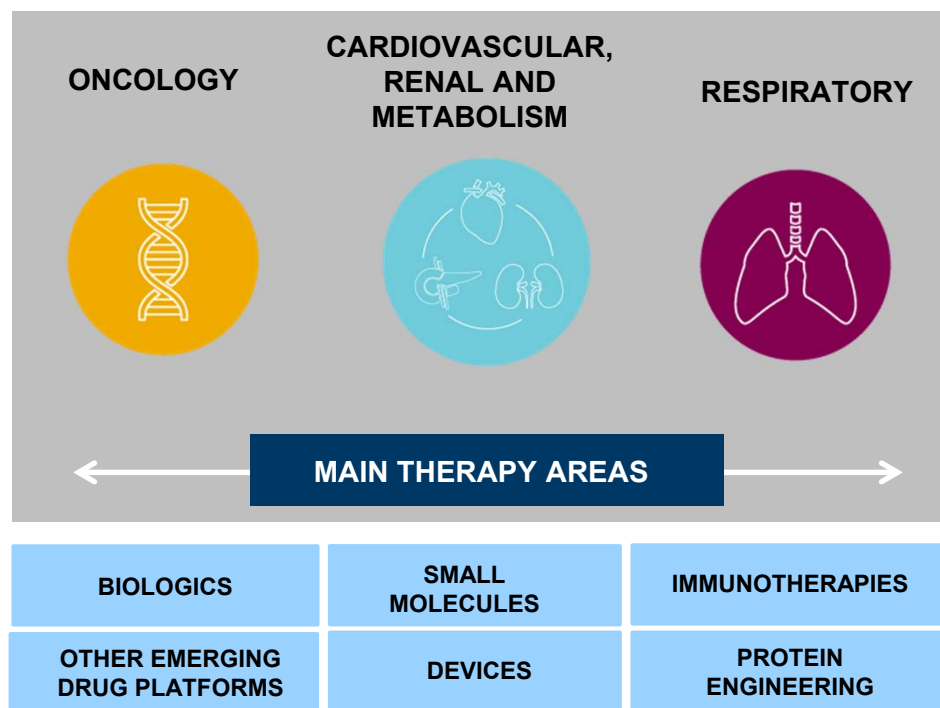
Sustainable organisation

- We are building a leaner organisation, which continues to promote scientific curiosity and attract, develop and retain great people.

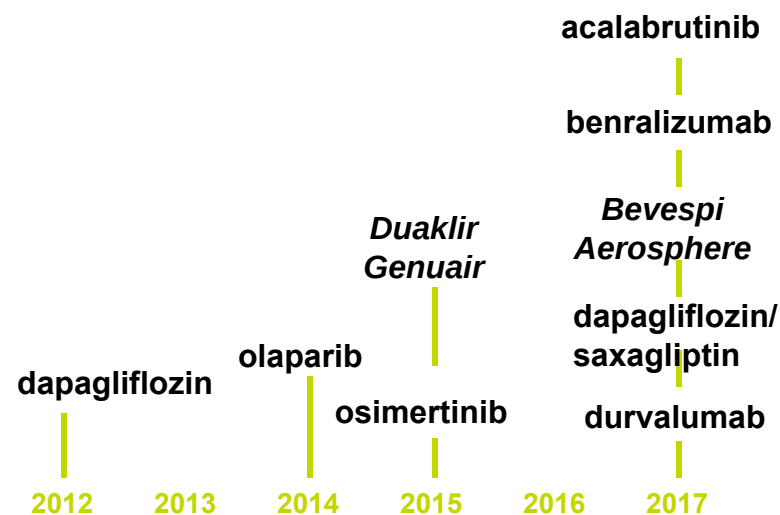


The global pipeline forms a robust portfolio of investigational therapies in varied stages of clinical development.

143 Projects in pipeline **9** new molecular entities in late-stage pipeline



New product approvals in 2017 exceed previous 5 years



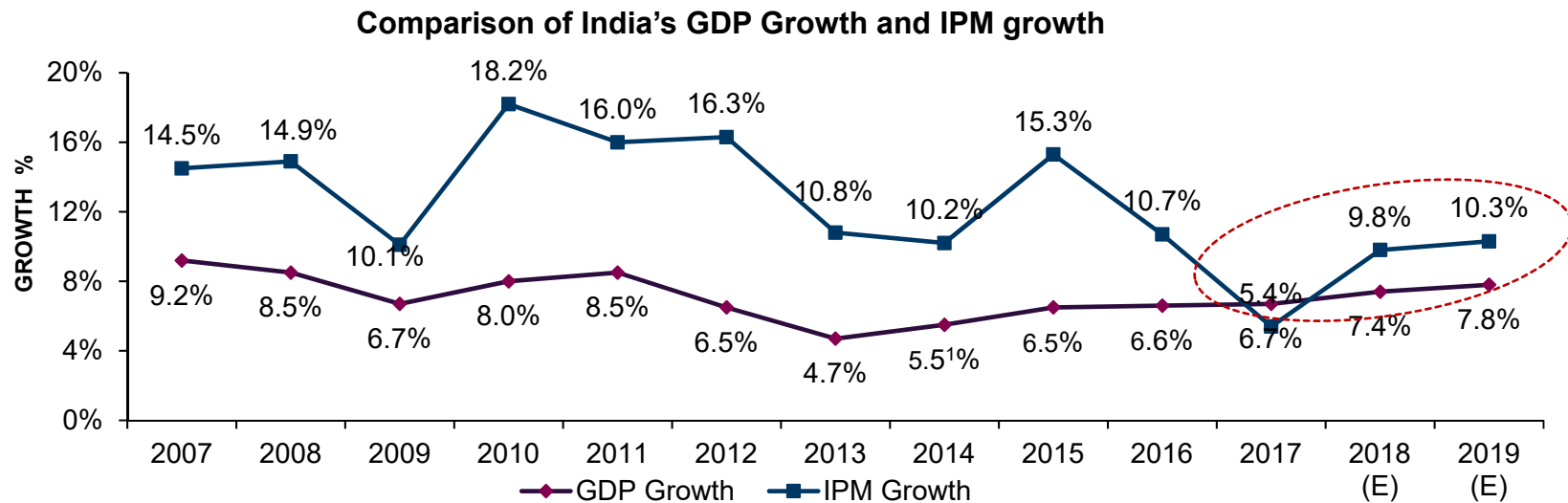
Source: <https://www.astrazeneca.com/our-science/pipeline.html> (as on 26 July 2018)

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

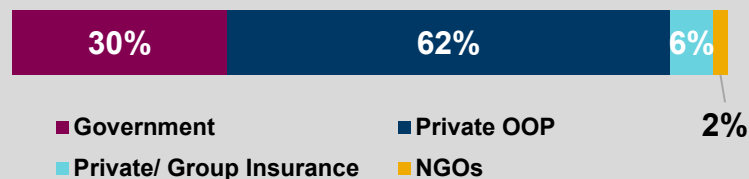


Market Overview

Backed by strong demand and macroeconomic factors the ₹ 127,253 Cr IPM is poised to grow at ~10% over next four years



Sources of Healthcare funding in India , by Payer



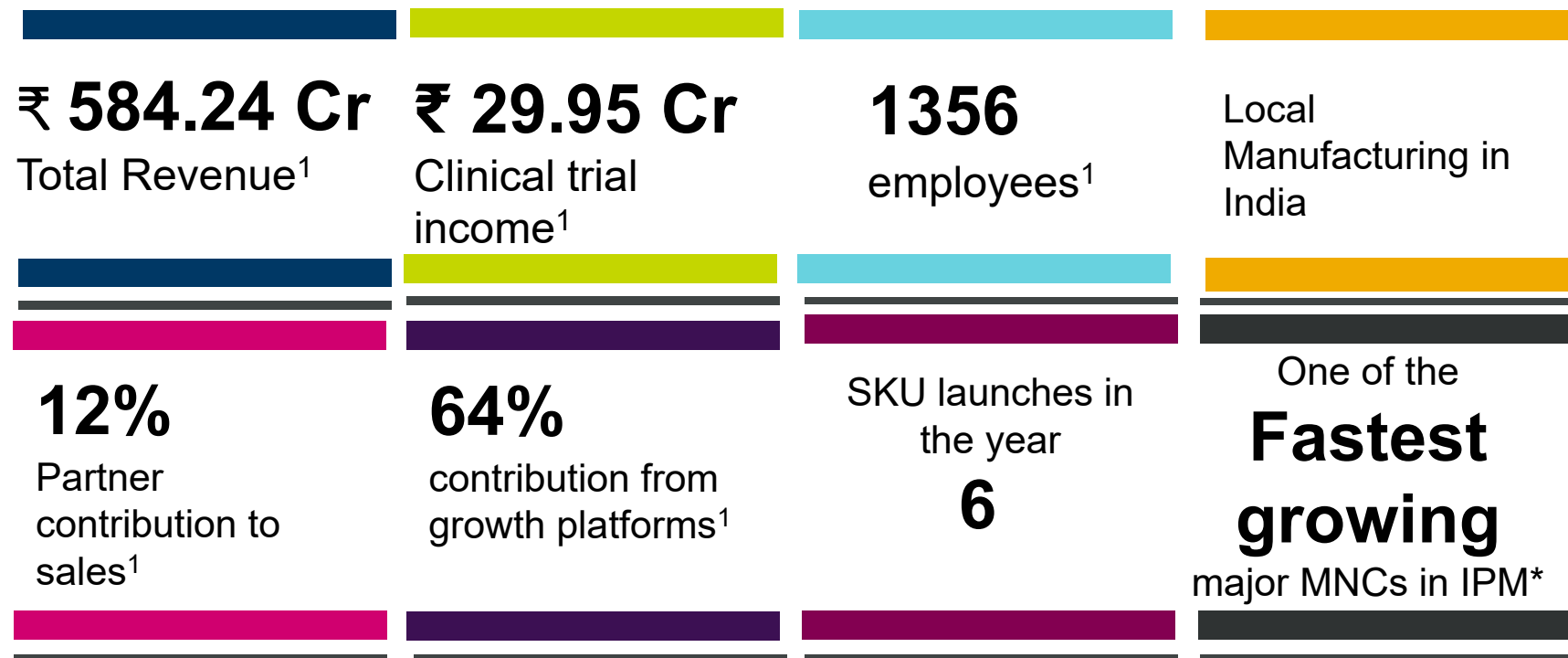
Ayushman Bharat (NHPS & NHP 2017)

- ✓ Healthcare **insurance for 100 mio BPL** families with insurance ceiling of **INR 5 Lakh** per family (National Health Protection Scheme-NHPS) 25th Sep 2018 onward
- ✓ **High NCD focus:** CVD, Cancer, Respiratory illnesses
- ✓ **Supportive of PPP** to achieve health goals

Source: 1. IMS Prognosis, March 2018, World Economic Outlook April 18, McKinsey India Pharma 2020, IMS Health database MAT July 2018

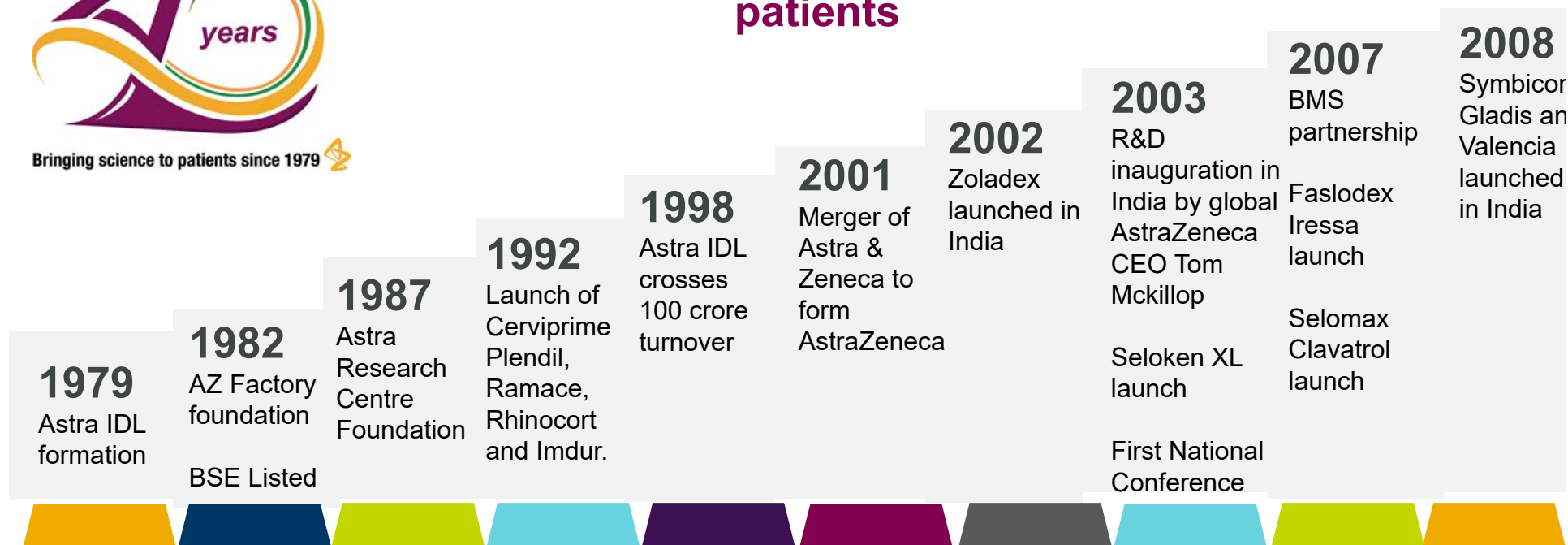
AZPIL

AstraZeneca Pharma India Ltd FY 2017-2018





4 decades of bringing science to patients



Clear daily
Imdur[®]
budesonide formoterol inhaler

Zoladex[®]
SafeSystem[™]

ONCE-A-DAY
Seloken[®] XL
bupropion hydrochloride tablets 150/100mg

FASLODEX[®]
fulvestrant 250 mg tablets

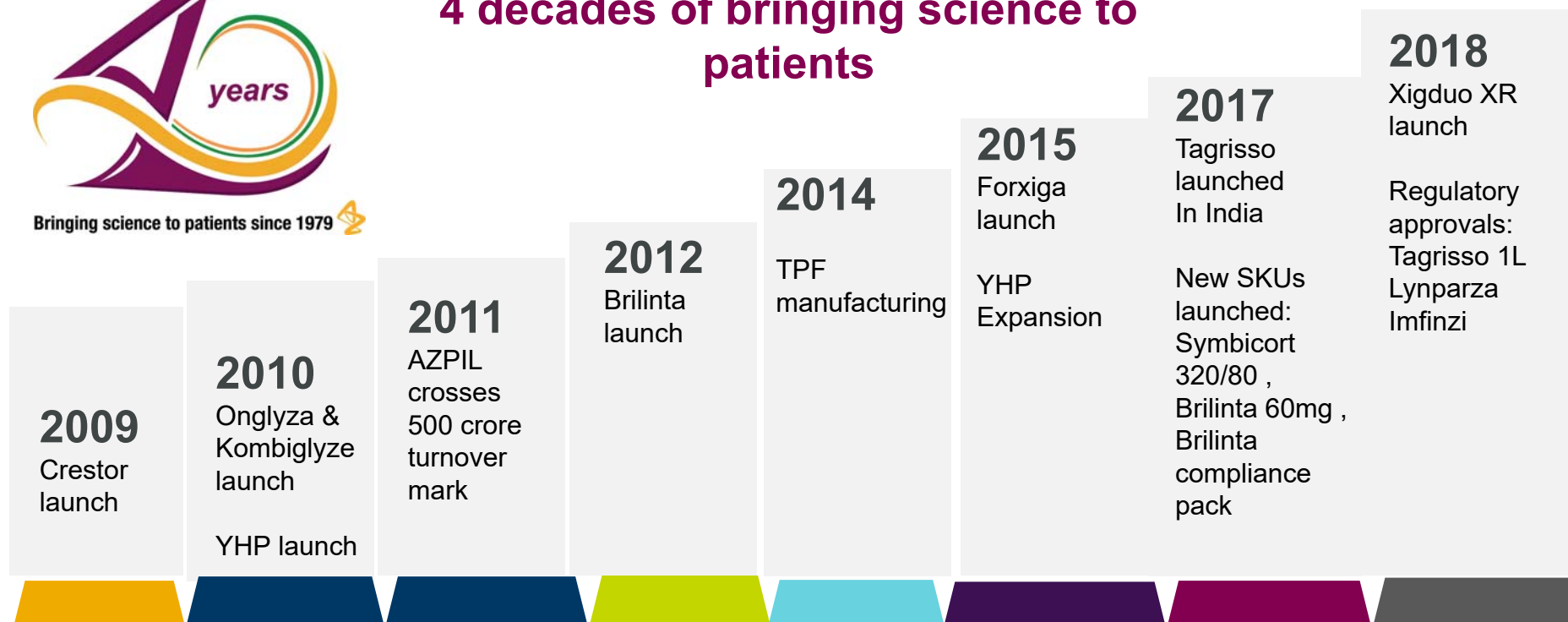
Symbicort[®]
budesonide/formoterol



Source: Internal data



4 decades of bringing science to patients



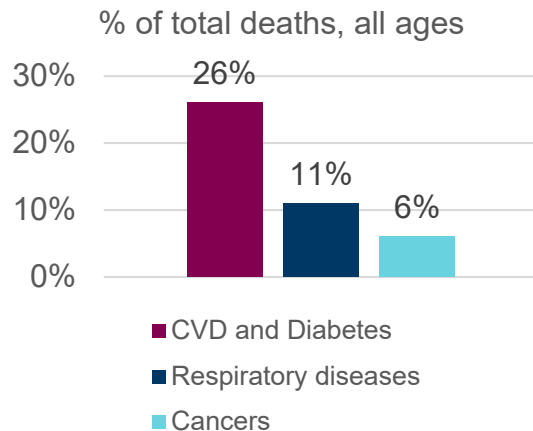
Source: Internal data

AZPIL is uniquely positioned to address the unmet need in India

43% of all deaths in India are due to Cardiovascular, Diabetes, Respiratory disease and Cancer

Share of NCDs in mortality in India

%



169 m hypertensive patients

65 m diabetics patients (Will become ~ 109 m by 2035
(IDF* estimates)

80 m CKD patients

~3 m cardiac related deaths per year

>1 m new cancer cases diagnosed every year

45 m asthma / COPD patients

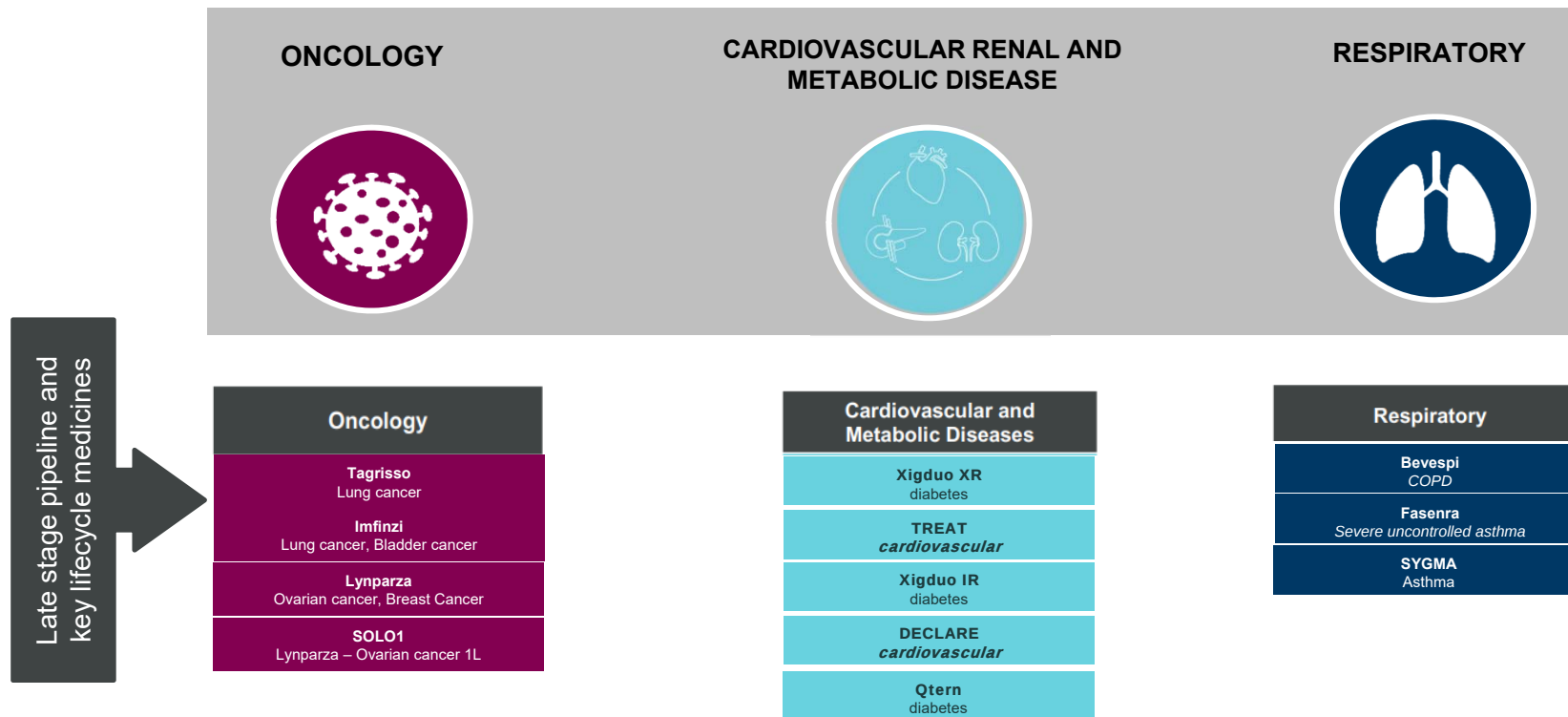
The probability of an Indian getting a heart attack is **4 times** greater than an American, **7 times** greater than a Chinese and **20 times** higher than a Japanese

Source: WHO, IDF, IMS Market Prognosis 2010-14, GLOBOCAN 2012
Derived from AK Singh 2013 prevalence of 17.3% extrapolated to 35yr age group above

ABBR: IDF – International Diabetes Federation ;
COPD – Chronic Obstructive Pulmonary Disease ; HIV – Human Immunodeficiency Virus CKD: Chronic Kidney Disease



Committed to impacting patient lives with upcoming launches*



1. Lifecycle development programme.
2. Under regulatory review in major jurisdiction.

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



AstraZeneca ranks 8th and is amongst the fastest growing MNCs in IPM¹

Rank	Company	In market Val (Cr)	MS%	GR%
	IPM	123762	100	7.8
1	Abbott	7791	6.30	11.1
2	Glaxo	3666	2.96	8.0
3	Pfizer	2948	2.38	-1.8
4	Sanofi India	2736	2.21	6.4
5	Novartis	1371	1.11	5.4
6	MSD	997	0.81	6.0
7	Merck	699	0.56	4.0
8	AstraZeneca	646	0.52	35.7
9	Janssen	500	0.40	8.4
10	Allergan	477	0.39	18.9
11	Boehringer Ingelheim	459	0.37	17.3

Brilinta in Top 100 Products of IPM²

Forxiga in Top 200 Products of IPM²

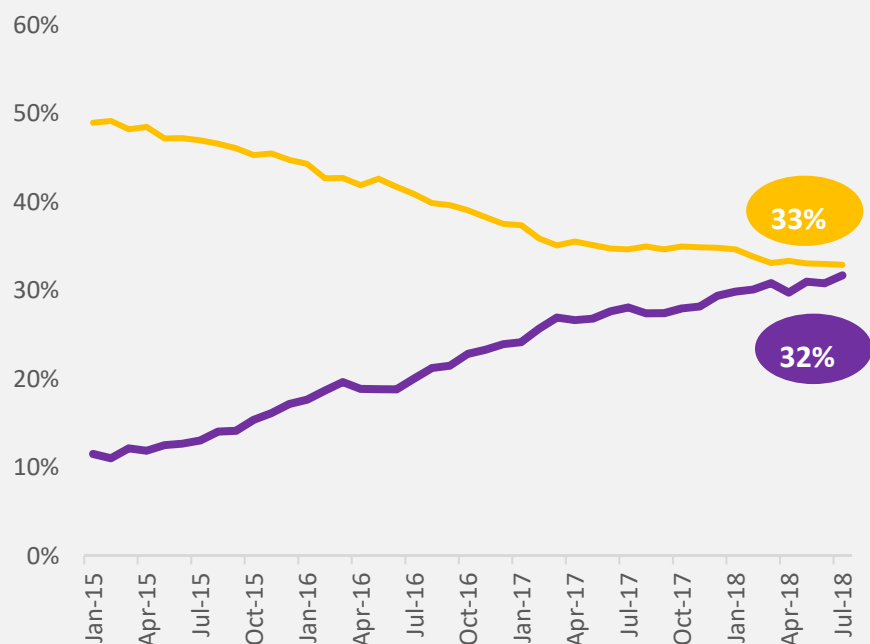
Symbicort is one of the fastest growing brands in ICS/LABA market²





Reaching out to more patients in Oral Antiplatelet market

*TICAGRELOR is the fastest growing OAP, molecule reaching 32% MS***



Innovative Initiatives helping us to achieve key internal Milestones

> **Compliance Pack**
helping to address adherence, Accessibility & affordability to activate
Duration (+15 Days)



> An Innovative **Red-DoT** campaign launched to improve Adherence ; gaining wide acceptance amongst HCPs/Hospitals



- > **60%(~85%#)** STEMI Penetration
- > **# No 3** in Volume Globally
- > **# No 9** in Value Globally

Dapagliflozin franchise on a high growth trajectory



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**

2017

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

Celebrating

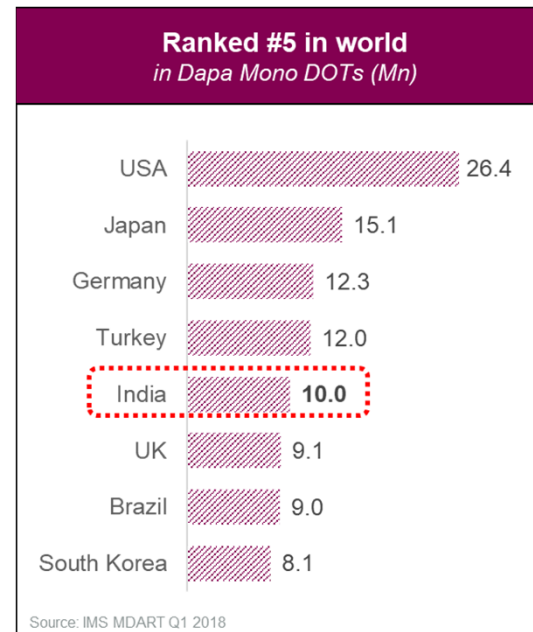
3 years

of improved T2D patient treatment outcomes

in India

2018

- Gaining ranks with current standing of **Rank #158** (Source -IQVIA MAT Apr '18 Rank)



More than 25k patients since launch

Exceeded previous benchmarks of Fixed dose combination launches in innovative OAD space



Tagrisso has touched >260 patient lives touched since launch ; Gearing up to benefit more patients with 1L indication

Levers that played a role



A strong pre-launch
with achievement
Of 100% of pre-
launch KPIs



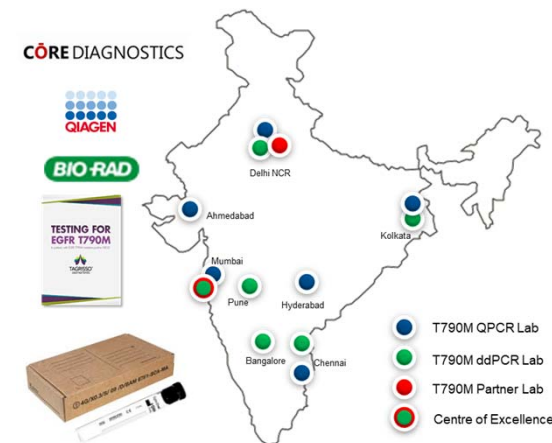
Focus on
reimbursed
channels



Scientific knowledge exchange
and laboratory capability
building drives up T790M
positivity



Strategic partnership to increase T790M testing
network



Addressing events impacting IPM

EVENTS

GST

**Uniform Code for
Pharmaceuticals
Marketing Practices**

Price controls

**Ban on Irrational Fixed
dose combinations (FDC)**

**Lack of infrastructure in
rural India**

AZPIL INITIATIVES

AZPIL was well prepared ahead of GST implementation

Company has already implemented the same and is well positioned for roll out of code

**AZPIL has a greater dependency on patented products.
Has been complying with all mandated price controls
within non-patented portfolio**

**The company discontinued Mits Linctus on notification of
the ban.
All existing FDCs are backed by clinical trials**

**AZPIL is working on partnering with the government to
improve NCD diagnosis and treatment**

Committed to fighting NCDs

AZ to be the *Trusted Partner* of *Gol* in the fight against NCDs

Young Health Programme

Program which focuses on primary prevention common NCDs, targeting risk behaviours, and providing youth with a voice.
Programme in its 8th year- has reached out to >255k adolescents and >140k members of the wider community

Healthy Lung

Diabetes in Action Policy Initiative

60% is the burden of Non-communicable diseases in India, as per MOHFW

Nov'17:
Meeting with Maharashtra CM at
Make in India, Sweden



Dec' 17
Meeting with CEO, Niti Aayog



Jan'18:
Meeting with Assam Chief Minister



Apr'18:
joint declaration on innovation partnerships for
a sustainable future between Sweden and India.



AZ as a trusted partner in providing innovative healthcare delivery solutions

EARLY ACTION IN DIABETES

MoU with the Department of Health & Family Welfare Kerala to set up a 360° Centre of Excellence for Management of Diabetes and associated metabolic diseases at Government General Hospital, Ernakulam

HEALTHY LUNG

- Letter of intent with ESIC Ranchi Model hospital for setting up an Uncontrolled Asthma Service.
- Partnership with Bangalore Traffic Department during World Asthma Day May 2018



Community service

Making a meaningful difference to the community



COMMUNITY DAY - MARCH 2018

- Over **10,000** people reached in 4 urban slum communities
- **923** screened for diabetes, hypertension and respiratory diseases



One AstraZeneca Week - August 2018



National Community Service Program

- Focus on prevention of **NCDs** and **young people**
- Impact **3,000+ young people** in a nation-wide NCD Sensitation in schools and community outreach programme



Summary

1. Growing healthcare and pharma market is fueling the company's growth

2. AstraZeneca's portfolio is well-positioned to address India's growing disease burden in NCDs

3. We expect to impact ~3 million patients in India through our life-changing medicines

4. AstraZeneca continues to outperform the market on the back of strong innovative product launches such as Brilinta , Forxiga & Tagrisso



**Making a difference by
touching lives of patients**