

Creating the leading European Specialty Pharma Platform

Company Presentation

August, 2024



**Every day > 60.000 people
are diagnosed with
life-threatening diseases¹**

**At Medios, we are dedicated to
timely providing high-quality
and efficient treatments to
patients with complex
diseases**

¹ Globally; Sources: <https://www.unaids.org/en/resources/fact-sheet>,
<https://www.who.int/campaigns/world-hepatitis-day/2021>,
<https://wfh.org/article/wbdr-2022-data-report-published/>,
<https://www.who.int/news/item/03-02-2022-world-cancer-day-closing-the-care-gap>;
Diseases: Cancer, hemophilia, HIV, hepatitis.

[Specialty Pharma]

**Complex and cost-intensive
treatment of life-threatening,
chronic or rare diseases**

e.g. Cancer, hemophilia, HIV, hepatitis

**“We are creating the leading
European Specialty Pharma
platform to treat diseases
optimally with
individualized medicine.”**

Matthias Gärtner, CEO Medios AG

MEDIOS





“I work for Medios because I can contribute to patient care that meets the highest quality standards.”

1 Medios at a Glance

2 Key Investment Highlights

3 Financials Q1 2024

4 Outlook

Appendix

The leading provider of Specialty Pharma in Germany

**#1 in Specialty
Pharma**

~€1.8bn
Revenue 2023

**Nationwide
coverage**

with **6** GMP Labs
& **2** Warehouses

**Comprehensive
expertise**

512 Employees¹

**Only Specialty
Pharma company
listed on FSE²**

since **2016**

**Partner
network**

~850
Partner
Pharmacies

**Highly
Diversified**

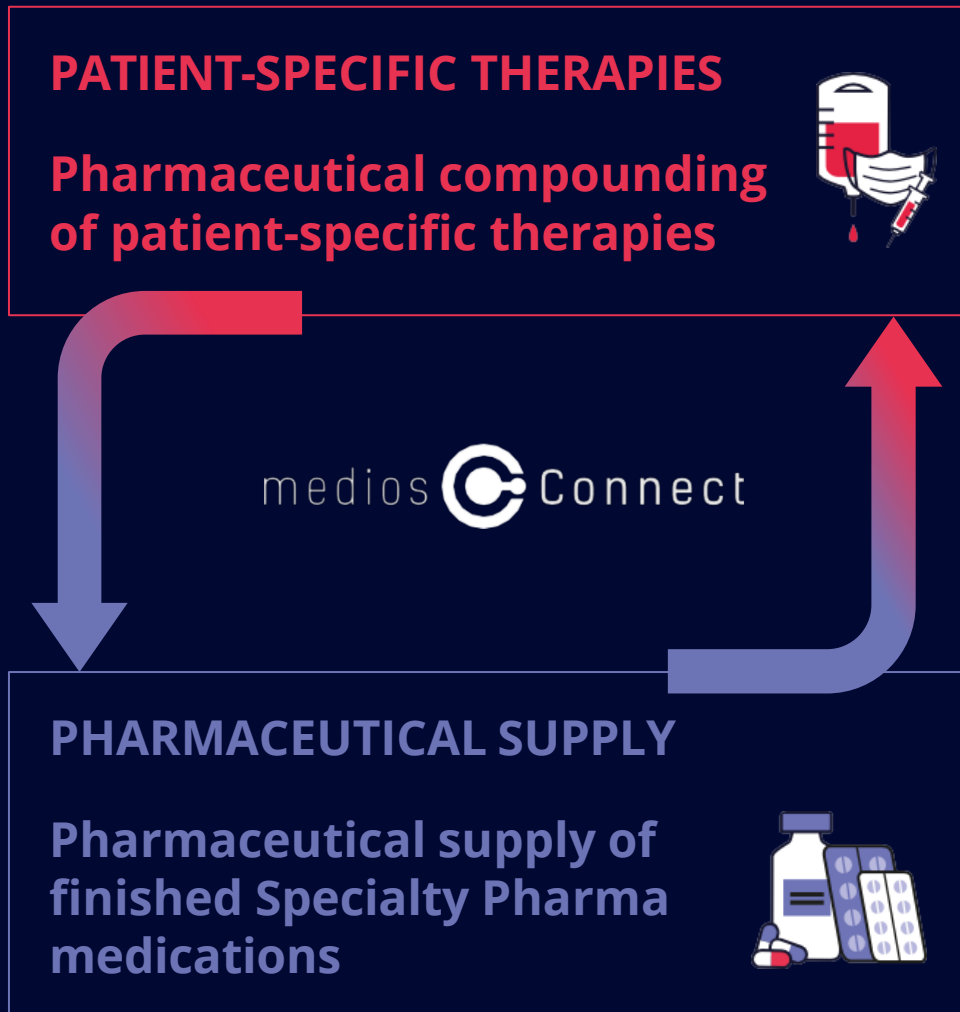
6
Indications for
complex diseases

Clear focus

1,000
Specialty
Pharmaceuticals

**Quality and
efficiency**

~400,000
Individual
Preparations 2023³



Integrated platform for Specialty Pharma

- Strategic **cross-selling** with **broad range** of indications
- Partner for changing **standard and individualized therapies**
- Ensuring **highest quality standards** through integrated nationwide **platform** of GMP¹ and GDP² facilities
- **Efficiency and accessibility** due to proven supply network

From a local player to the #1 in Specialty Pharma in Germany

7-fold

Growth of
revenue within
just 6 years

#1

In Specialty
Pharma via
organic growth
and M&A

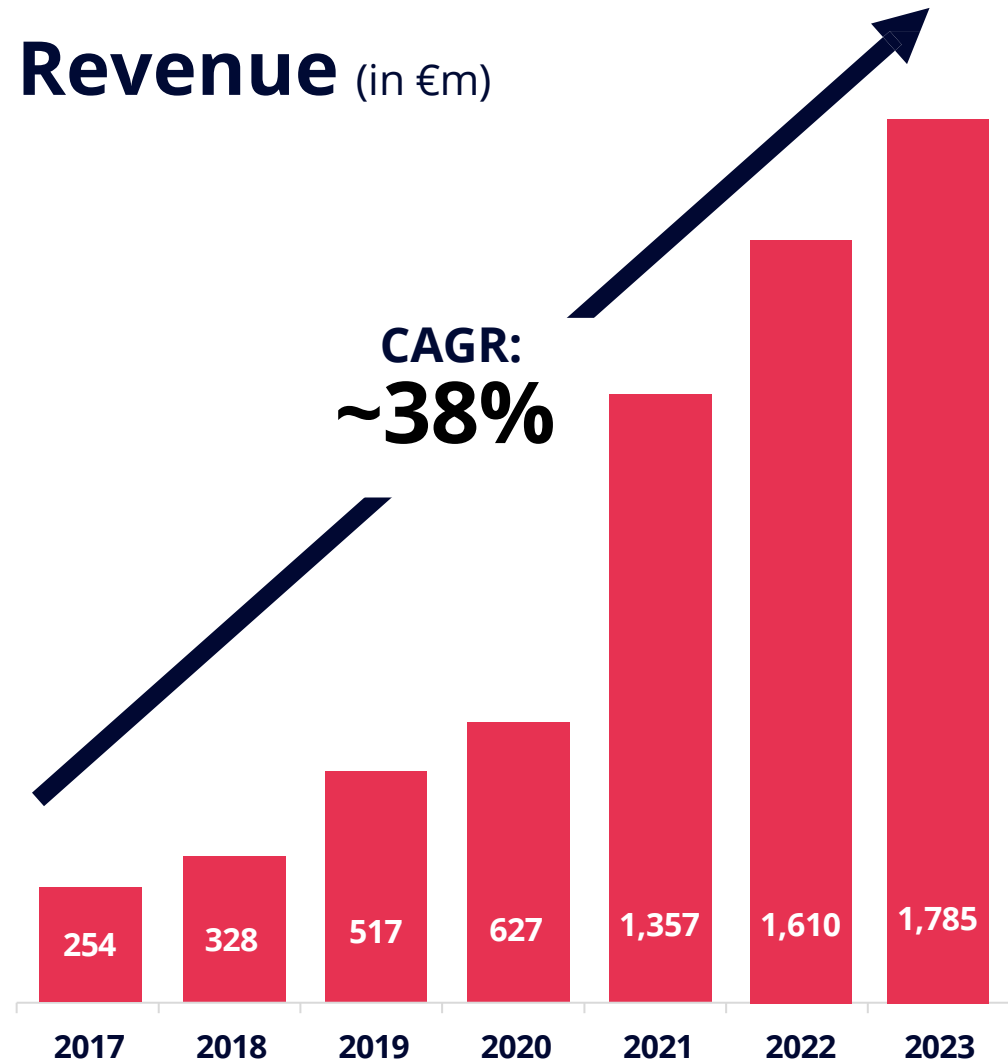
21.3% p.a.

Organic growth
since 2017

> €2.15bn

Revenue ambition
(Outlook 2025)

Revenue (in €m)



Strong financial results in 2023

~€1.8bn

+10.8%

**Net
Revenue**

~€60.5m

+10.3%

**EBITDA
pre¹**

**Ongoing
positive
operating
cash flow**

2.5€

+10.1%

**EBITDA pre¹
per share**

**Low CAPEX
~€1.3m**

Clear strategy to build the leading European Specialty Pharma Platform



Executive Summary: Transformative and value enhancing acquisition

Internationalization	<ul style="list-style-type: none">• First step in Medios internationalization• Immediate market entry into three European countries: NL, BE, ES• A leading position in compounding in Northwestern Europe
European Platform	<ul style="list-style-type: none">• First building block to establish the leading European compounding platform• One-stop-shop on international scale• Improve healthcare and maintain accessibility for patients across Europe
Product diversification	<ul style="list-style-type: none">• Expanding the value chain through 23 own pharmacies in NL• Entry into high-margin segment of APIs• Also covering high-margin non-sterile business
Substantial synergies	<ul style="list-style-type: none">• Significant international cross-selling opportunities across borders for API• International sourcing expertise to fight drug shortages
Attractive purchase price	<ul style="list-style-type: none">• Purchase price comprises a cash component of €235.3m and 1.7m Medios shares (~€23.9m*):• Only small portion of equity-linked financing• Attractive multiple• Immediately accretive to EBITDA pre and EBITDA pre margin

Snapshot Ceban Pharmaceuticals

Ceban Pharmaceuticals



Founded
2004



Headquarters
Breda, Netherlands



Employees
~600

Financials 2023

~€160m
Revenue

~€29m
EBITDA adj.

~18%
EBITDA
margin adj.

Market position per country¹



Netherlands
Market leading



Belgium
#2



Spain
#5

- **Leading full-service compounding services platform**
- **Diversified business model** covering the full compounding value chain:
 - Compounding Services (non-sterile and sterile)
 - API Services
 - Chain of pharmacies (23 pharmacies operating under 'Medsen' brand)
- **Operating 4 well-invested GMP-compliant facilities**
 - 2 in the Netherlands: non-sterile and sterile compounding
 - 1 in Belgium: API repacking and (non)sterile compounding
 - 1 in Spain: API repacking
- Services **>200 hospitals & clinics**, and **>3,300 retail pharmacies**
- Realised an **organic revenue CAGR of ~10% (2021-2023)**
- **Highly committed management team** with strong track record

Status Debt- Financing

- **Revolving credit facility of up to €75m** available to finance growth; **restricting maximum net leverage**
- Fully drawn **bridge-loan over €200m**, term (including extension option) June 2025
- **Net debt** as of 30 June 2024 **appr. €150m**
- Bridge-loan **follow-up financing** under negotiation
- **Estimated** future annual **free cash flow after interest payments** (c. €30 - 40m) fully available for redemption of credit facility potentially starting from 2025



“Medios delivers the best quality – reliably, competently and fast. These are key criteria for the optimal care of our patients.”

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Compelling Investment Case

**#1 in
Specialty
Pharma
market** in
Germany



**Unique business
model** with
compounding and
supply networks
supported by
digital
platform



**Attractive and
rapidly growing
market** in
Germany and
Europe



Leveraging market
leadership in
Germany to **build
European
Specialty Pharma
platform**



**Culture,
leadership and
sustainability** as
key enablers



**Strong and
profitable
growth** with solid
balance sheet and
cash generation



#1 in Specialty Pharma market in Germany

Undisputed market leader in Germany with clear USPs

**High
economies
of scale**

**Highest
international
quality
standards
(GMP¹ and
GDP²)**

Critical size to
cope with and
**benefit from
regulation**

Largest network
of specialty partner
pharmacies (**~850
out of ~1,000**)

Compounding
capacities of
**> 600k
preparations p.a.**



3.8%

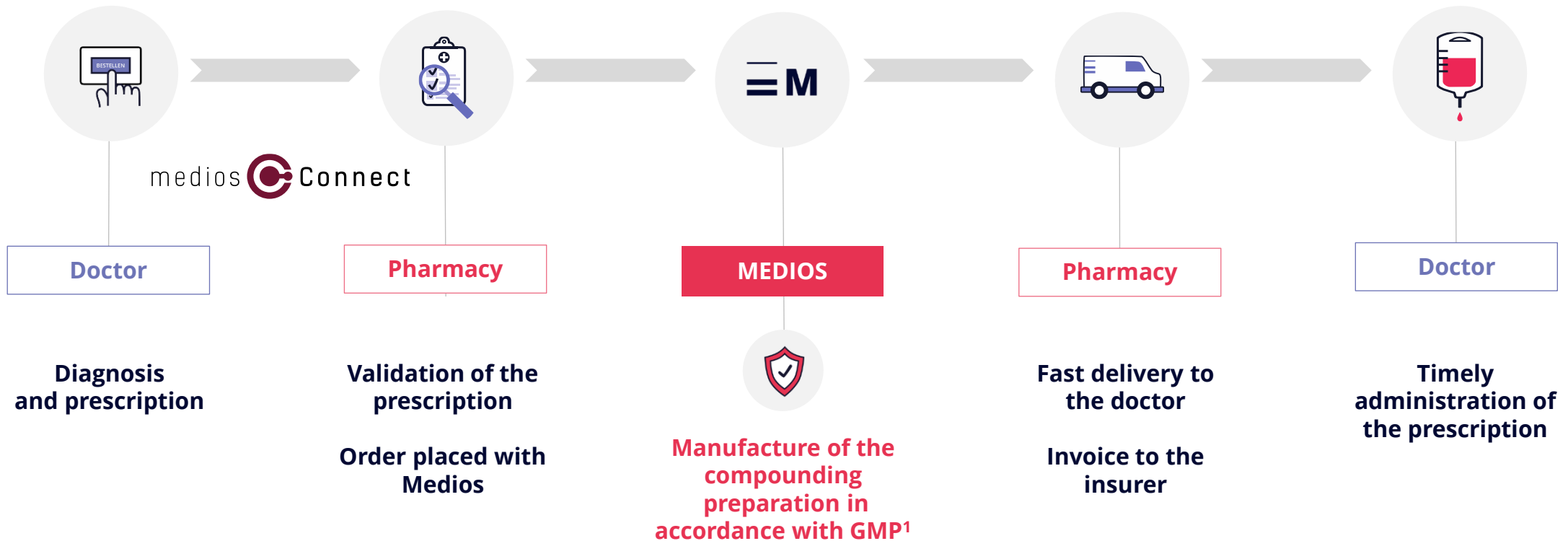
Market share in
Specialty Pharma
Compounding in
Germany



14%

Market share in
Specialty Pharma
Supply in
Germany

Patient-specific Therapies: Role of Medios in the supply chain



Decentralized manufacturing of **patient-specific preparations** enables timely administration to patients

Strong position among market players

Wholesale Companies

- Full-line wholesalers (~100,000 products)
- Primarily a logistics partner not a consulting partner
- Mandatory legal inventory range of 14 days
- Intransparent discount structures

Specialized Merchants

- Limited range
- Focus on niche segments and special processes

Manufacturing Companies

- Mainly regional focus
- Primarily manufacturers, not consulting partners
- Limited range

Pharmacies

- ... more than 200 pharmacies with clean room
- No GMP¹ certification
 - Less cost-effective manufacturing

Pharmaceutical Supply

NOWEDA

PHOENIX group

Alliance Healthcare

Sanacorp

omnicare

virion serion



≡ M

zyto manufaktur

zyto service



Reinraumlabor Neus

MEDIPOLIS

Niemeyer Apotheke

APOTHEKE am Salzberg

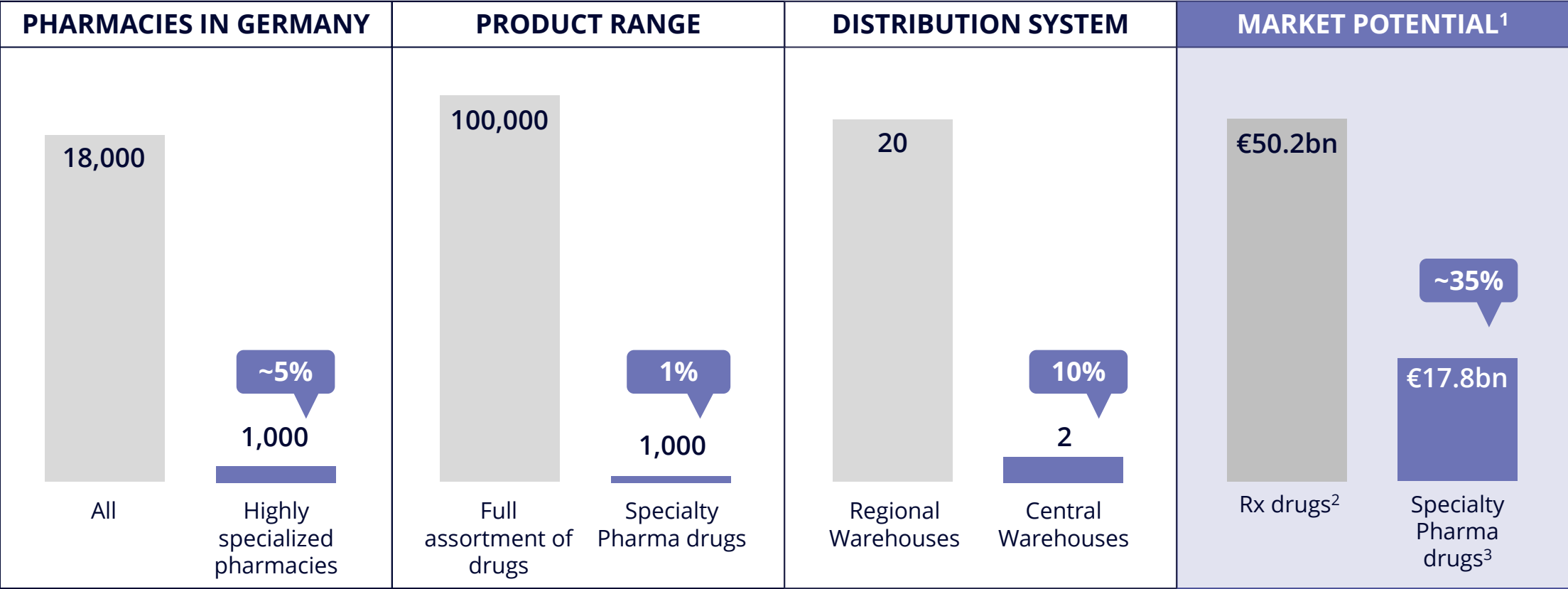
sanitätshaus edenwald-apotheke

Hirsch Apotheke

WAAGE APOTHEKE

alte rats APOTHEKE

Pharmaceutical Supply: Unique Selling Propositions – Highly focused and highly efficient

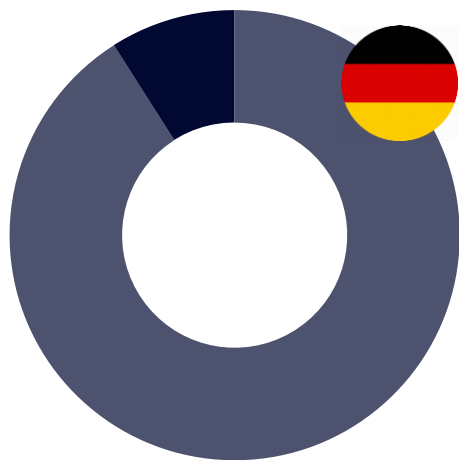


Full Range Wholesaler Medios

#1 in Specialty Pharma market in Germany

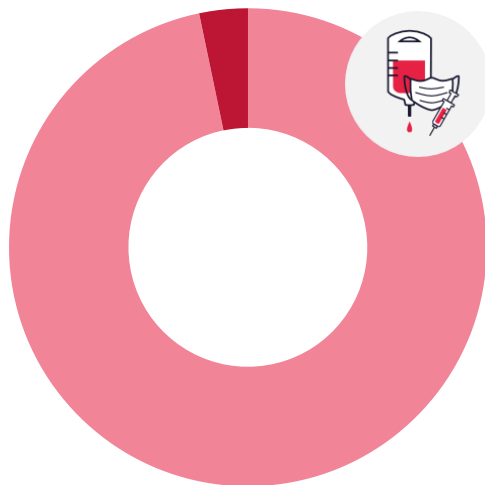
Undisputed market leader

Total revenue
German Specialty Pharma Market: €17.8bn²
Medios market share: ~ 10%¹



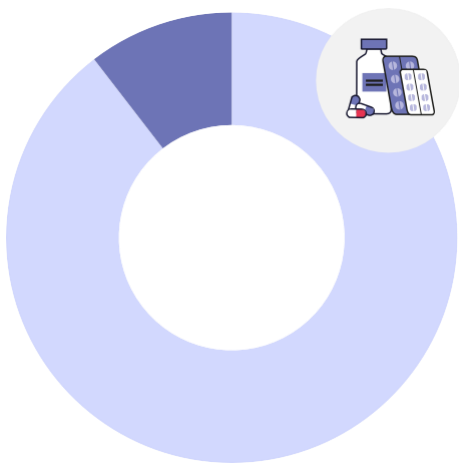
- Specialty Pharma Germany
- Medios market share

Total revenue Germany
Patient-Specific Therapies: €5.9bn²
Medios market share: ~ 3.8%¹



- Patient-Specific Therapies
- Medios Patient-Specific Therapies

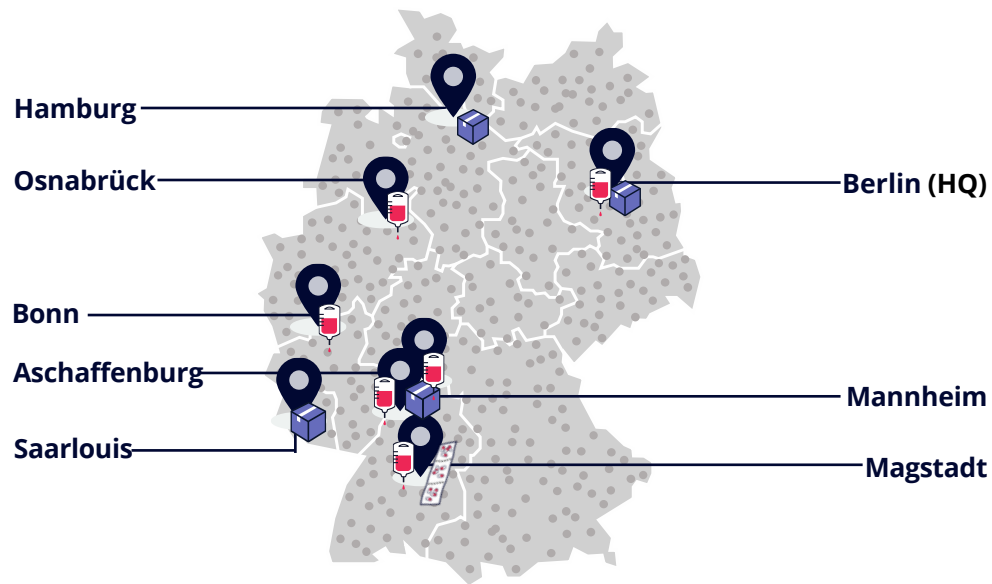
Total revenue Germany
Pharmaceutical Supply: €11bn²
Medios market share: ~ 14%¹



- Pharmaceutical Supply
- Medios Pharmaceutical Supply

¹ Based on FY 2023 | Source: Bundesbericht GAmSi Jan-Dec 2021 | IQVIA, Global Use of Medicines 2022: Outlook to 2026; Medios calculations
² Segment revenues do not sum up to total revenue as revenues generated with tools are only included in the total numbers.

Excellent geographic coverage through a market leading German and strong European network



Germany

- **6 GMP labs**/ 1 blistering lab; 2 central / 2 regional warehouses
- Around 850 specialized partner pharmacies
- FY 2023: Around 400,000 individualized preparations

With the acquisition of Ceban, Medios will have a **leading position** in **Specialty Pharma compounding** in Europe



Europe: Germany, Netherlands, Belgium, Spain

- **10 GMP-(compliant) labs**
- Around 850 specialized partner pharmacies in DE, 23 **own** pharmacies in NL and additional 3,300 partner pharmacies, >200 hospitals across Europe
- > 1 million individualized preparations

Unique business model

Highly focused and efficient Specialty Pharma supply business

Supplying
**~850 out of
~1,000**
specialized
pharmacies in
Germany



Offering all
1,000 Specialty
Pharma drugs
out of **100,000**
available
products



Operating
**2 central
warehouses** vs.
20 for average
pharma wholesaler



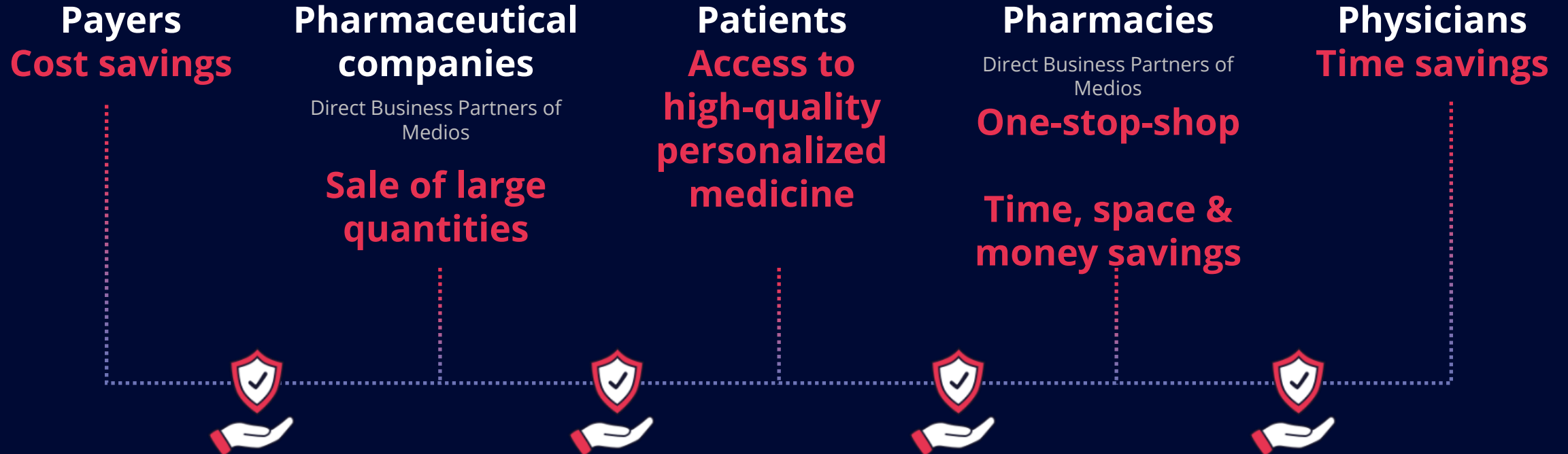
Targeting
around **36%** of
the **€50bn**
**German
Rx Pharma
market**



Unique business model

Our integrated Specialty Pharma platform offers substantial (added-)value for all stakeholders

MEDIOS – Integrated Specialty Pharma platform





Example Medios Innovation

Pre-filled syringes used to treat age-related macular degeneration (AMD)

Unique business model

Improved safety at lower costs for AMD treatment

- Sterile, single-use syringes (GMP¹)
- Ready-to-use packaging
- Efficient use of active ingredient
- Simplified ordering and billing processes (mediosconnect)
- Win-Win-Situation

**Improved
safety for
Patients**

**Time
savings for
Physicians**

**Cost
savings for
Payers**

¹ GMP = Good Manufacturing Practice

Unique business model

Low risk business profile

- ✓ **Largely independent** of economic cycles
 - ✓ **Sustainable annual cash flow generation**
 - ✓ **Low** capital intensity
Capex €5m p. a.
 - ✓ Market with **steady, long-term growth**
 - ✓ **Critical size with scale effects** to benefit from increasing need for quality and efficiency
 - ✓ **As market leader**, benefitting from regulatory changes in the mid to long term



Attractive and rapidly growing market in Germany and Europe

Benefitting from the megatrends

Ageing population

Rising prevalence of chronic disease

Individualization

New patient-tailored therapies

Focus on quality and efficiency

Increasing rate of outsourcing to GMP² facilities



Attractive and rapidly growing market in Germany and Europe

Specialty Pharma growing faster than the general pharmaceuticals market

Revenue of Pharmacies in Germany in 2021

59.93bn

+5.7% yoy

Total revenue¹

thereof

€50.20bn

+6.4% yoy

Rx drugs revenue¹

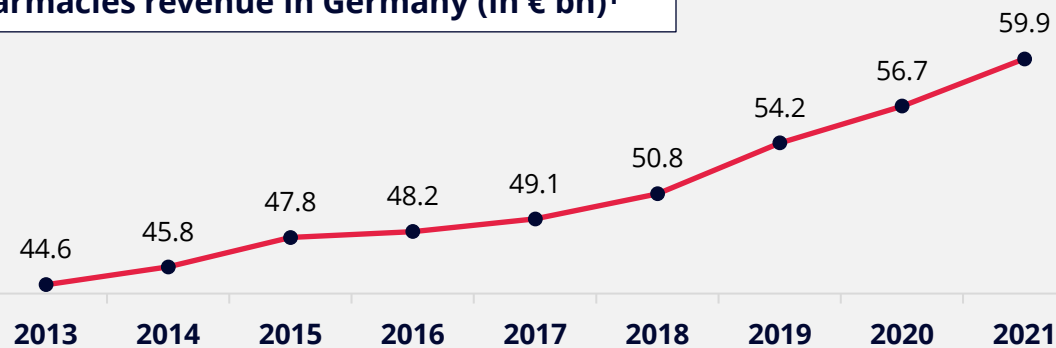
thereof

€17.8bn

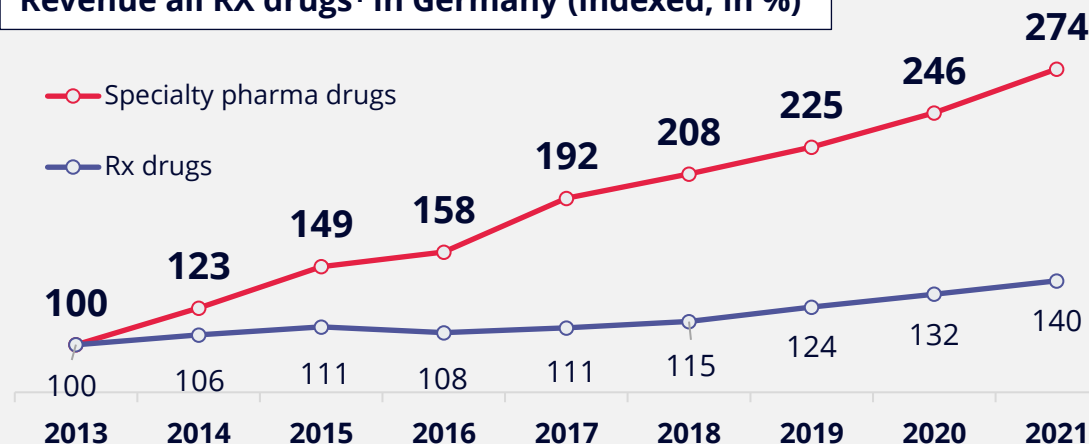
2026e: €28.7bn (+61%)

Specialty Pharma drugs revenue²

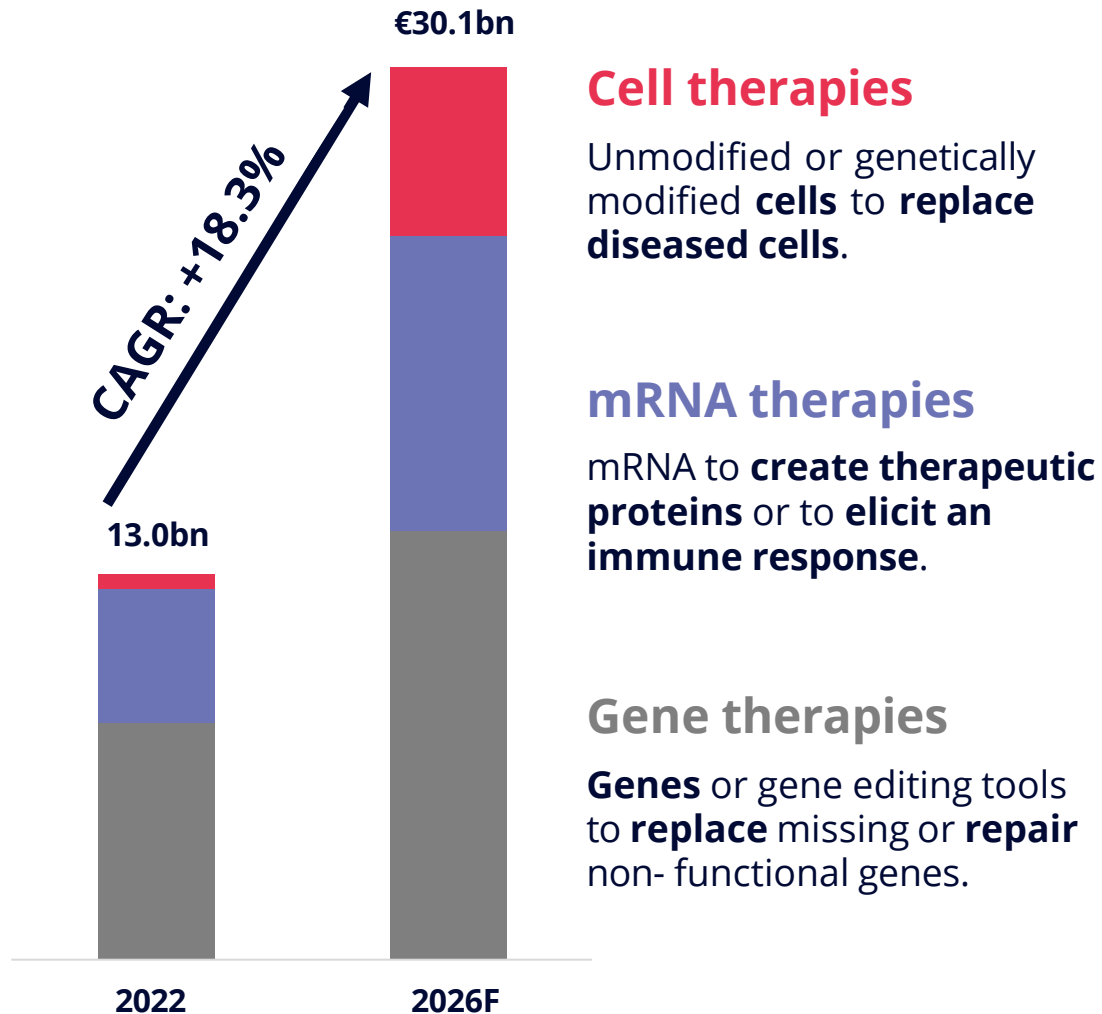
Pharmacies revenue in Germany (in € bn)¹



Revenue Specialty Pharma drugs² vs. Revenue all RX drugs¹ in Germany (indexed, in %)



Global advanced therapeutics market*



Leveraging market leadership

Advanced Therapies will revolutionize patient care – Medios' platform is an enabler

Expert in patient-specific **GMP¹ manufacture** of therapies in **smallest batches**

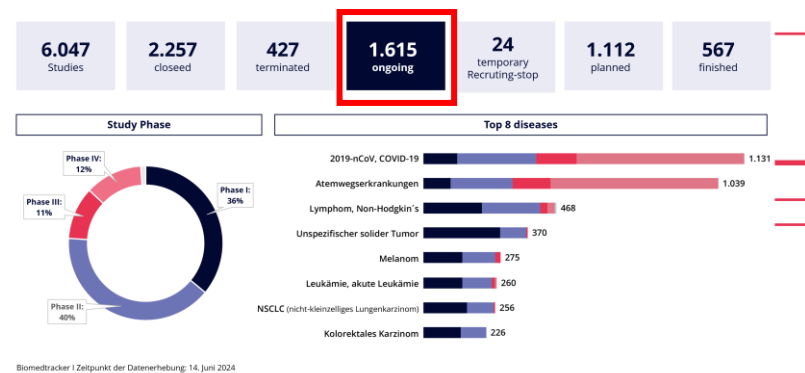
Comprehensive **network of pharmacies** and **logistics** for **personalized medicine**

German platform in place, **European platform** being built

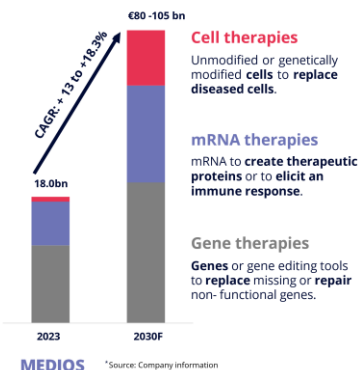
Market entry into Advanced Therapy field

Advanced Therapy market continues to be promising

Worldwide
Outlook: clinical studies with Advance Therapies



Global advanced therapeutics market*



Leveraging market leadership
Advanced Therapies will revolutionize patient care – Medios' platform is an enabler

Expert in patient-specific **GMP¹ manufacture** of therapies in **smallest batches**, backed-up by a **decentralized manufacturing network**

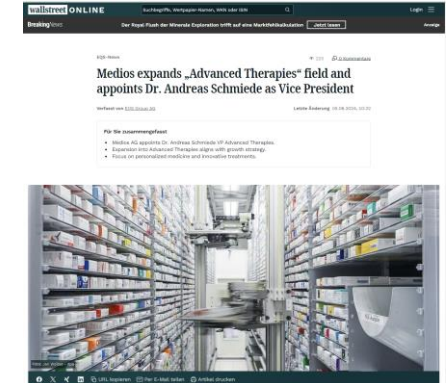
Comprehensive **network of pharmacies and logistics** for **personalized medicine**

German platform in place, **European platform** being built

¹ GMP = Good Manufacturing Practice

Establishment of an organisational structure

Appointment of Dr A Schmiede VP Advanced Therapies



- Ongoing market analysis
- Leveraging the existing decentralized GMP manufacturing and logistic infrastructure
- Support of the German National Strategy for Gene and Cell Therapy with Medios expertise
- Build-up of a partner network



Culture, leadership and sustainability as key enablers
ESG embedded in management

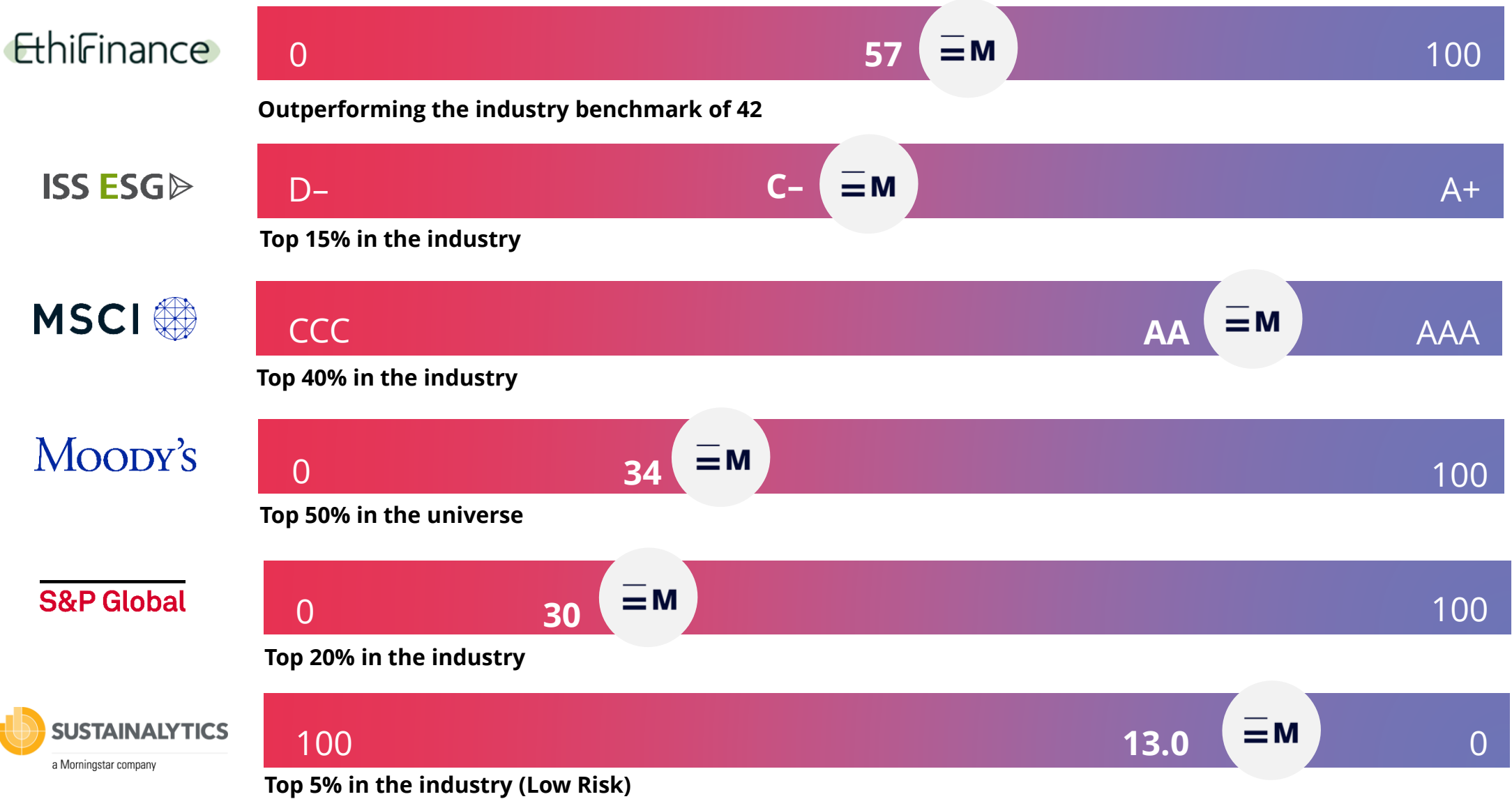
Comprehensive **“ESG strategy 2025”** as part of Corporate strategy

Implementation of ESG program **on track** measured against **57 KPIs**

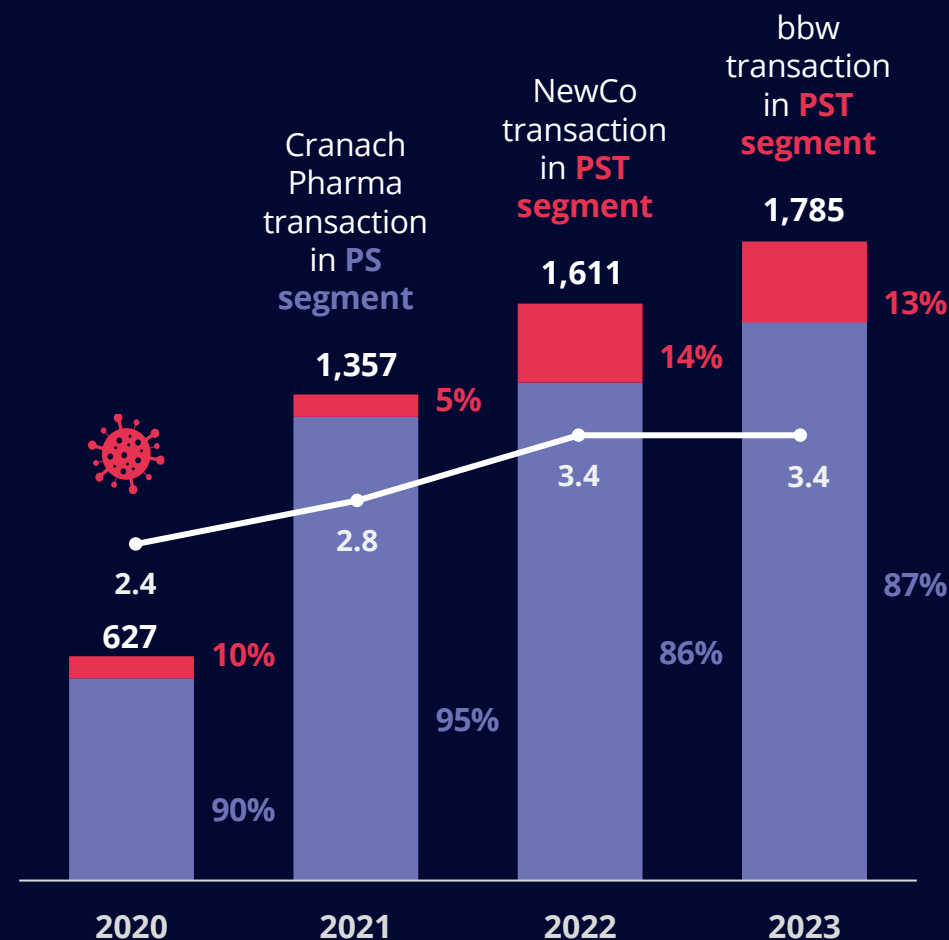
ESG committee steers all ESG activities: chaired by CEO and comprising among representatives of all departments and operating areas the Supervisory Board’s sustainability officer and the members of the Executive Board

Culture, leadership and sustainability as key enablers

Average to above-average ESG Ratings (as of August 2024)



Segment revenue, EBITDA pre¹ margin
(in €m, %)



Revenue Patient-Specific Therapies (PST)

Revenue Pharmaceutical Supply (PS)

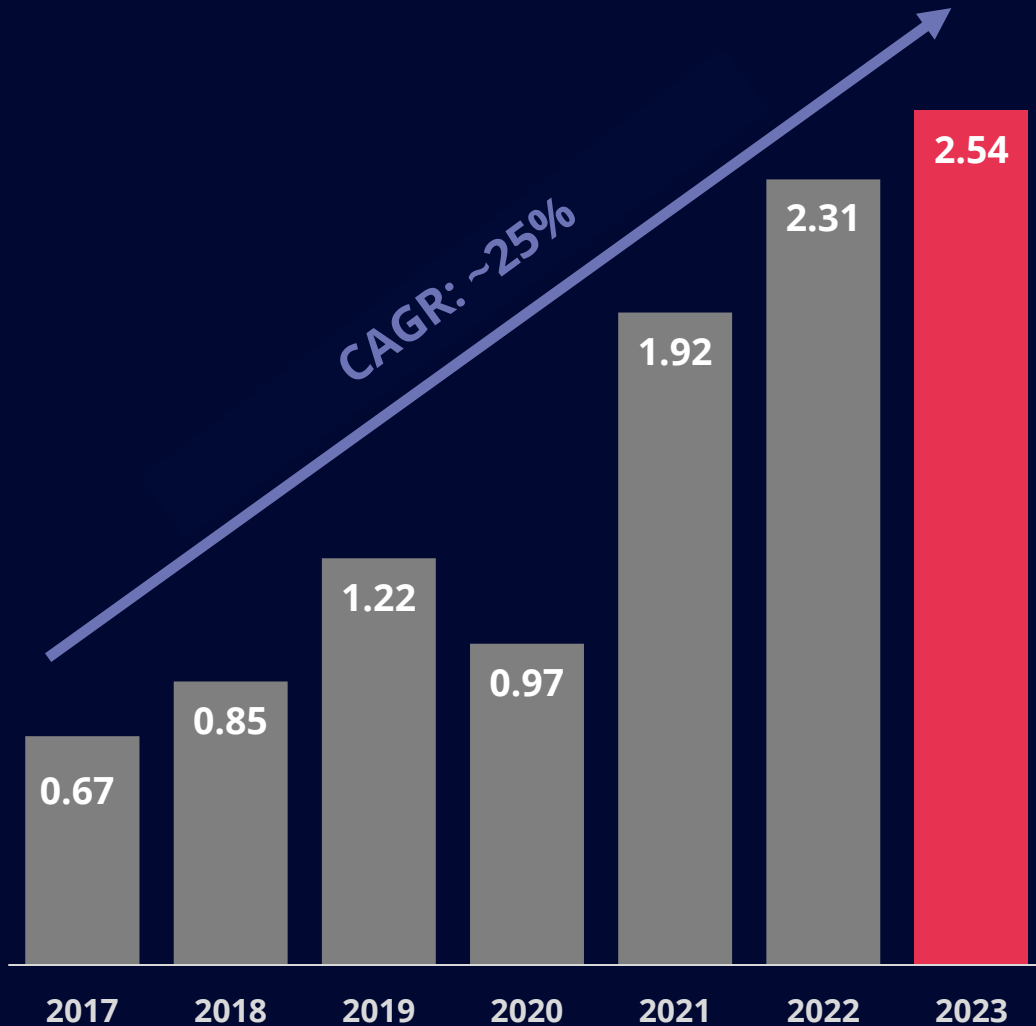
EBITDA pre¹ margin

Strong financials
Proven track-record

EBITDA pre ¹ margin 2023	
Medios Group	3.4%
Patient-Specific Therapies	9.7%
Pharmaceutical Supply	3.0%

¹ EBITDA pre is adjusted for special charges for stock options and expenses for M&A activities as well as from 2023 additionally for one-time performance-based payments for the acquisition of manufacturing volumes

Group EBITDA pre¹ per share in €




MEDIOS

Strong financials

Creating value since IPO

Value-creation for shareholders and stakeholders improved financials through synergies

¹ EBITDA pre is adjusted for special charges for stock options and expenses for M&A activities as well as from 2023 additionally for one-time performance-based payments for the acquisition of manufacturing volumes



"I am passionate about working for Medios because patient care is at the center of what we do."

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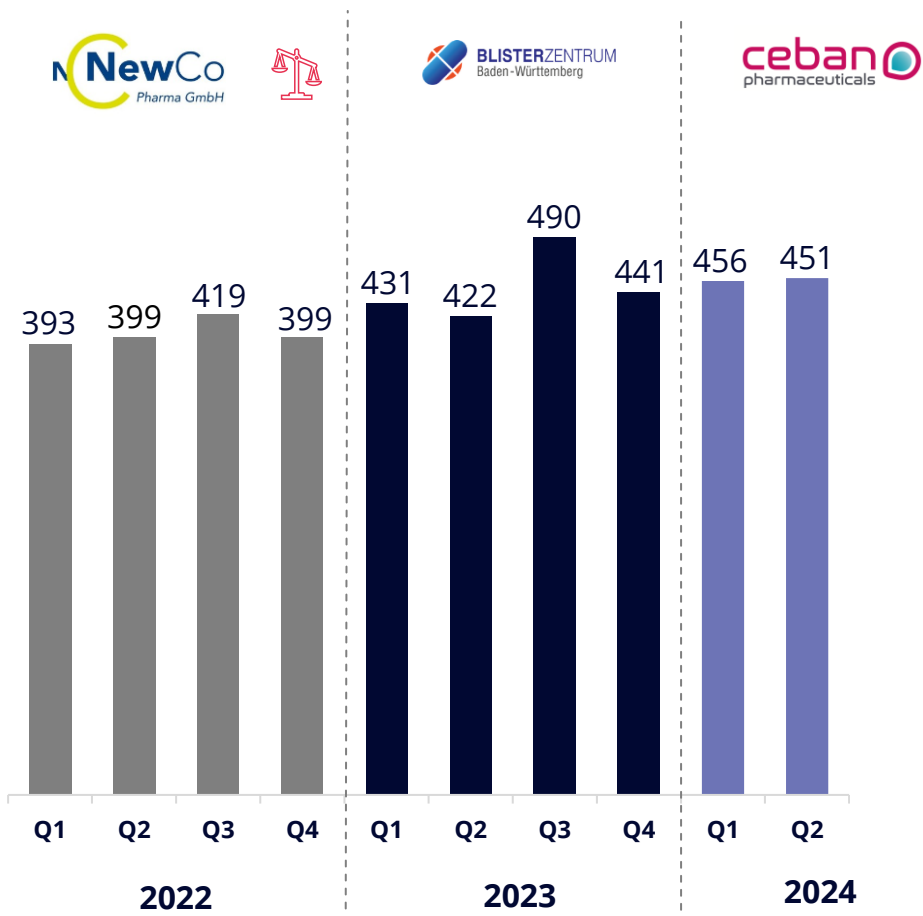
4 Outlook

Appendix

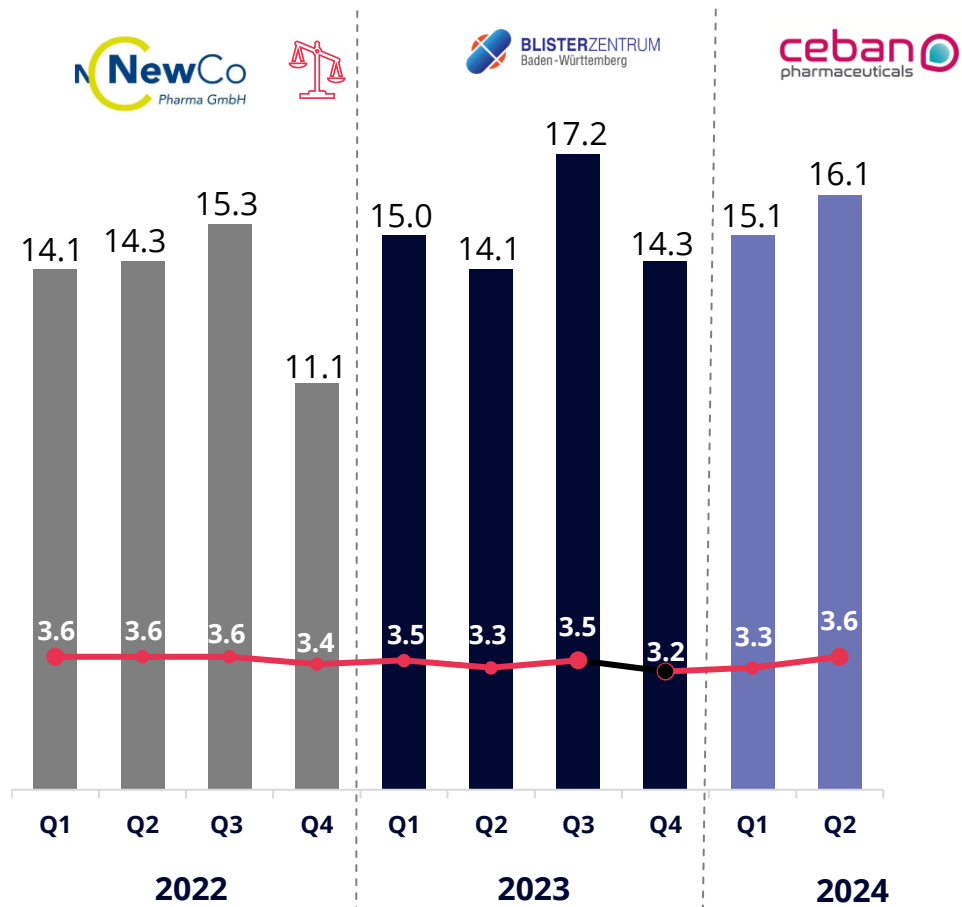
Executive summary

QoQ – Revenue and EBITDA pre growth

Revenue (€m)



EBITDA pre¹ €m



¹ EBITDA is defined as consolidated earnings before interest, taxes, depreciation and amortization. EBITDA pre is adjusted for special charges for stock options, expenses for M&A activities and for performance-based payments for the acquisition of compounding volumes as well as from 2024 expenses for ERP-System implementation

H1 2024 – Solid Group financials and strong operating CF

In € million	H1 2024	H1 2023	Δ in %	Comments
Revenue	907.3	853.5	6.3%	<p>Financials including the strong contribution of Ceban (new segment: International) for one month</p> <ul style="list-style-type: none"> Revenue driven by PS segment (+€53.8m) and CEBAN acquisition (+€11.6m) (segment International) Gross profit increased mainly due to CEBAN acquisition (+€6.1m) and strong PS; PST decreased due to lower revenue, deconsolidation of KB, regulatory headwinds, and higher performance-based payments EBITDA pre rose by 7.3% driven by a disproportionate growth of PS (+€3.0m) and +€2.6m contribution of International; PST lower EBITDA pre (€-1.6m) was mainly due to regulatory headwinds; Services decreased as a result of higher personnel and other expenses (€-1.9m) Strong operating CF of €34.0m mainly due to positive operating result and actively managed working capital on the reporting date; consequently, strong free CF Investing CF of c. €-220m mainly resulted from payments for CEBAN shares and repayment of existing loan liabilities less cash contributed by CEBAN Financing CF of €196.3m reflects the drawing of the bridge loan for the acquisition of CEBAN (€200m) less interest payments (€-1.3 m) and payments for rental agreements (€-1.6m) Cash & cash equivalents consisted mainly of unrestricted bank deposits
Gross profit¹	60.4	54.4	11.0%	
<i>gross margin in %</i>	6.7%	6.4%	4.7%	
EBITDA pre²	31.1	29.0	7.3%	
<i>margin in %</i>	3.4%	3.4%	0.0%	
Conversion rate in % (<i>EBITDA pre/gross profit</i>)	51.6%	53.3%	-3.2%	
EBIT	12.6	15.4	-17.8%	
EPS (€), undiluted	0.27	0.39	-30.8%	
CF from operating activities	34.0	-75.2	n/a	
CF from investing activities	-219.9	-16.4	>100%	
CF from financing activities	196.3	42.6	>100.0%	
Free cash flow ³ (before M&A)	32.3	-75.7	n/a	
	30 June 2024	31 Dec 2023	Δ in %	
Inventories	95.4	59.3	60.8%	
Cash & cash equivalents	81.7	71.0	15.0%	
Equity	502.9	468.8	7.3%	
<i>ratio in %</i>	53.9%	78.8%	-31.6%	
Liabilities	429.4	125.9	>100.0%	
<i>ratio in %</i>	46.1%	21.2%	>100.0%	

¹ Gross profit = Revenue - Cost of materials | ² EBITDA is defined as consolidated earnings before interest, taxes, depreciation and amortization. EBITDA pre is adjusted for special charges for stock options, expenses for M&A activities and for performance-based payments for the acquisition of compounding volumes as well as from 2024 expenses for ERP-System implementation | ³ Calculated as follows: Operating CF less CAPEX



"We highly value Medios as a reliable customer with large Specialty Pharma order volumes."

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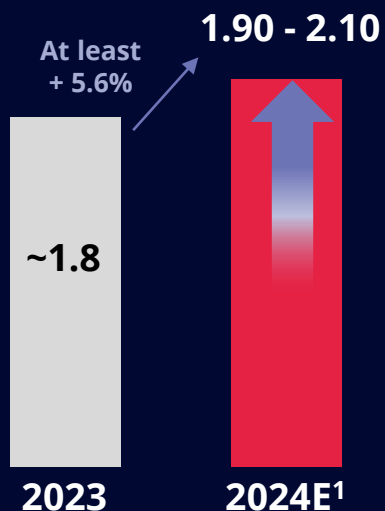
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4 Outlook

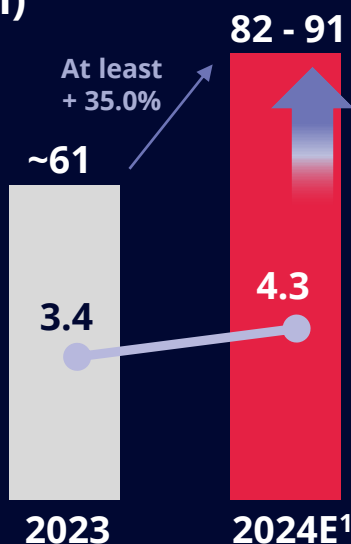
Appendix

Guidance 2024 confirmed

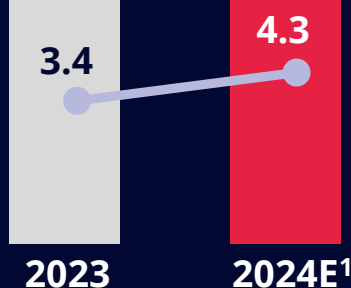
Revenue (€bn)



EBITDA pre¹ (€m)



Margin (%)



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*Graphics based on mean value for 2024

Guidance 2024 & growth story

New Group: Significant revenue & EBITDA pre increase expected

Guidance confirmed:

- One month later than planned consolidation of Ceban as of June 1, 2024 (previously as of May 1, 2024 expected); regulatory pricing headwinds in Germany
- Therefore burden on the EBITDA pre guidance; growth of **EBITDA pre will be at least 35%** with a substantially **higher EBITDA pre margin** of c. 4.3%
- EBITDA pre¹ adjusted by certain one-off-expenses
- EBITDA pre¹ not adjusted by integration costs



¹ EBITDA is defined as consolidated earnings before interest, taxes, depreciation and amortization. EBITDA pre is adjusted for special charges for stock options, expenses for M&A activities and for performance-based payments for the acquisition of compounding volumes as well as from 2024 expenses for ERP-System implementation

Compelling Investment Case

**#1 in Specialty
Pharma market**
in Germany



**Unique business
model** with
compounding and
supply networks
supported by digital
platform



**Attractive and
rapidly growing
market** in
Germany and
Europe



Leveraging market
leadership in
Germany to **build
European
Specialty Pharma
platform**



**Culture,
leadership and
sustainability** as
key enablers



**Strong and
profitable growth**
with solid balance
sheet and cash
generation



A portrait of Dr. Yann Samson, a middle-aged man with short dark hair, smiling. He is wearing a dark suit, a white shirt, and a blue and white striped tie. The background is a light, neutral color.

"I am convinced that close cooperation, knowledge sharing and transparency are key to deliver successfully on our ESG commitments."

Dr. Yann Samson, Chairman of the Supervisory Board
ESG Expert

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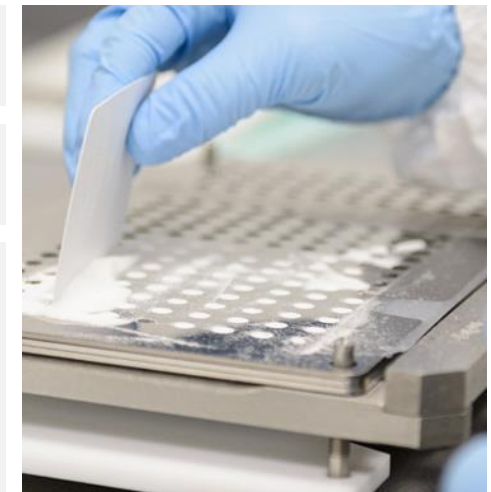
Appendix

Ceban operates synergistic positions across the compounding value chain

	Compounding Services	API Services	Pharmacies
Description	<ul style="list-style-type: none"> Tailor-made medication compounded at GMP-compliant facilities for pharmacies, hospitals, clinics, and homecare Compounding facilities: <ul style="list-style-type: none"> Breda, NL: Sterile and non-sterile compounding Oostrum, NL: Sterile compounding Wilrijk, BE: Non-sterile and sterile compounding 	<ul style="list-style-type: none"> Sourcing, repacking and distributing APIs and excipients to pharmacies and hospitals compounding in-house Repacking facilities: <ul style="list-style-type: none"> Wilrijk, BE Barcelona, ES 	<ul style="list-style-type: none"> 23 owned pharmacies across the Netherlands under the “Medsen” chain Automated digital services, including 24h dispensing machines
Revenue breakdown	~45%	~15%	~40%
Presence	Netherlands, Belgium	Belgium, Spain	Netherlands
Synergies with Compounding Services		<ul style="list-style-type: none"> ✓ Timely access to APIs ✓ Strong supply chain ✓ In-depth relationships with pharmacies, hospitals and clinics ✓ Starting point for Compounding Services 	<ul style="list-style-type: none"> ✓ Providing insight in market demand and dynamics ✓ Negotiation power over wholesalers ✓ Access to other pharmacies through sale of dispensing machines ✓ Flexibility in distribution



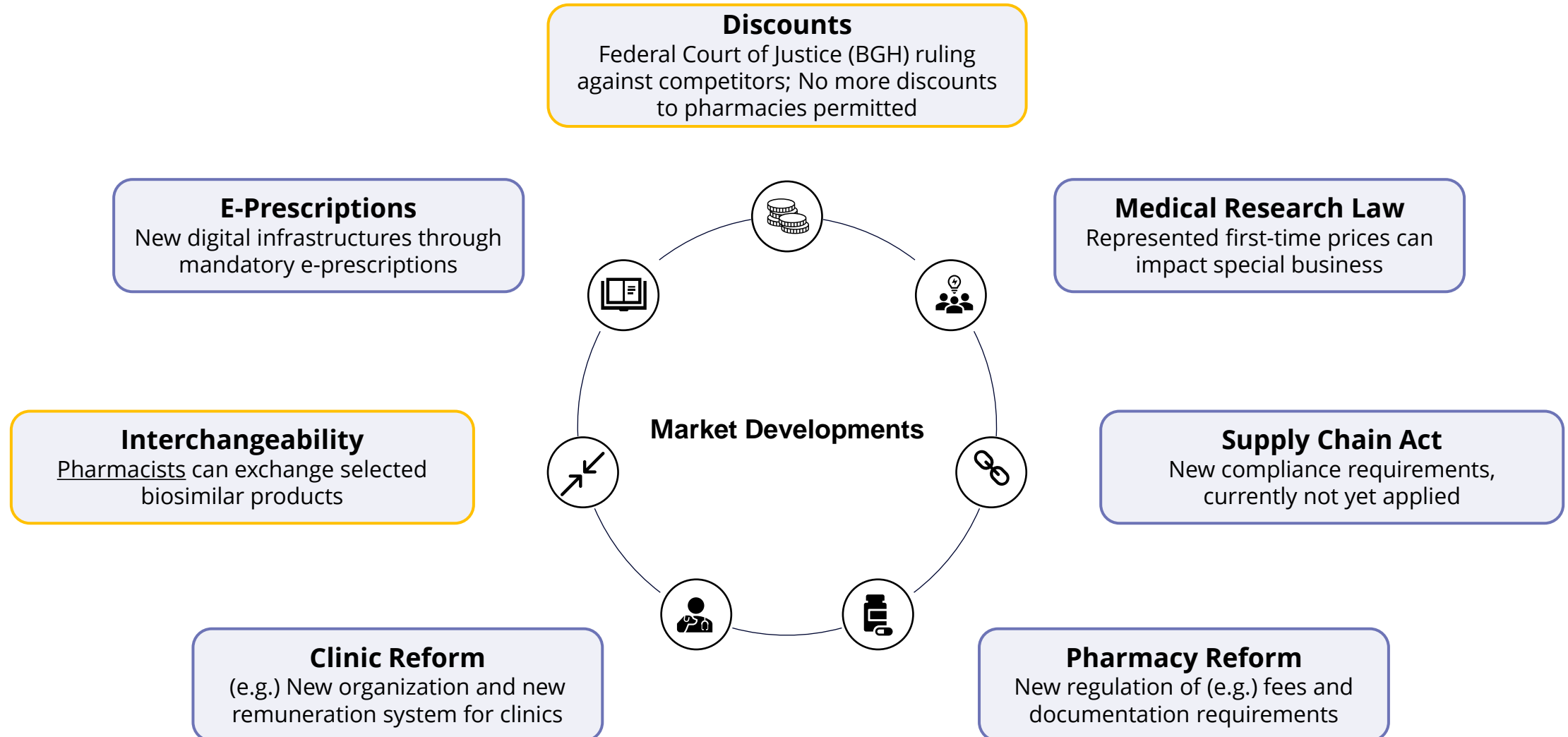
Repacking of APIs, Belgium



Capsule filling, the Netherlands

Regulatory developments

Regulatory market developments are evaluated on a regular basis



FY 2023 – Strong PS business; PST impacted by regulatory effects

	Pharmaceutical Supply 'PS'		Patient-specific Therapies 'PST'		Internal Services		IFRS consolidation		Group	
FY YoY in € million	FY 23	FY 22	FY 23	FY 22	FY 23	FY 22	FY 23	FY 22	FY 23	FY 22
Total segment revenue delta (yoy in %)	1,696.3 16.1%	1,461.7	256.4 -4.1%	267.3	8.9 13.9%	7.8	-176.9 40.5%	-126.0	1,784.7 10.8%	1,610.8
Revenue – external delta (yoy in %)	1,558.1 12.1%	1,390.3	226.0 2.7%	220.0	0.6 14.1%	0.5	n/a	n/a	1,784.7 10.8%	1,610.8
EBITDA pre ¹ margin (% of revenue – total) margin (% of revenue – external)	46.7 2.8% 3.0%	38.0 2.6% 2.7%	21.8 8.5% 9.7%	23.7 8.9% 10.8%	-8.0 -90.0% -13.5%	-6.8 -87.4% -13.1%	n/a	n/a	60.5 3.4% 3.4%	54.9 3.4% 3.4%

The Medios share

Basic Information

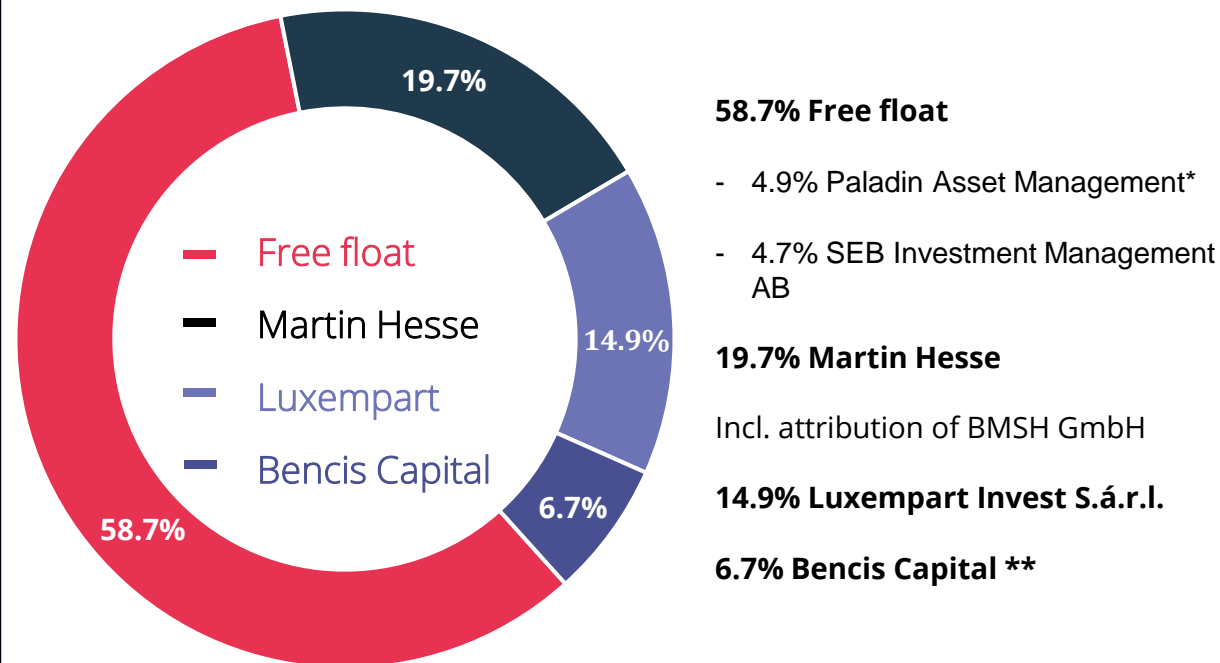
Share Capital	25,505,723€
No. of shares	25,505,723
Share class	No-par value bearer shares
ISIN	DE000A1MMCC8
	DE000A409682*
Segment	Regulated Market Frankfurt (Prime Standard)

Analyst Coverage

Covered by seven international investment banks / brokers

*Note pursuant to Sec. 7 German Stock Exchange Admission Regulation (*Börsenzulassungsverordnung – BörsZulV*): From a capital increase in kind registered with the commercial register on 11 June 2024, 1,700,000 newly issued shares came into existence, which bear a separate ISIN (DE000A409682) and which are currently not admitted to trading.

Shareholder Structure

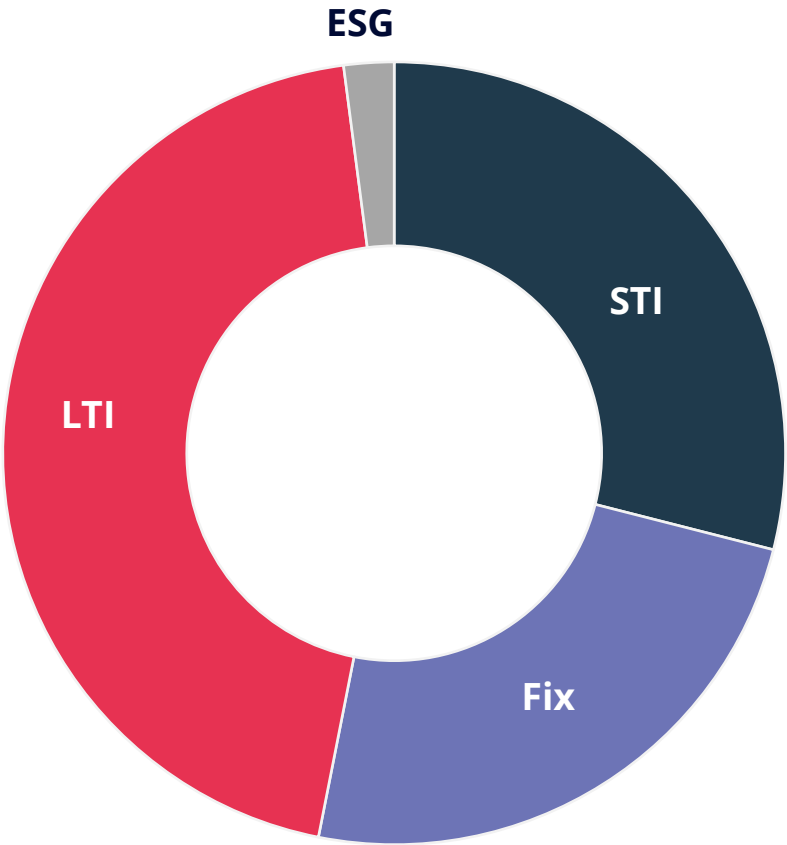


All figures according to voting rights notifications by the notifying parties

* Paladin Asset Management Investment stock corporation with variable capital and sub-funds

** In the course of a capital increase in kind in connection with the acquisition of Ceban Pharmaceuticals B.V., 1,700,000 new shares (ISIN DE000A409682) have been issued to Bencis Buyout Fund V GP B.V., acting for the risk and for the account of Bencis Buyout Fund V C.V., Amsterdam, the Netherlands („Bencis“). These new shares are subject to a lock-up agreement entered into between Medios AG and Bencis, pursuant to which the disposal of the new shares is restricted for a period of 24 months upon completion of the transaction. Therefore, these shares will not be admitted to trading during the lock-up period.

Total target remuneration



Appendix Remuneration System for the Executive Board (March 2023)

Compensation structure of the total target remuneration

Non-performance related fixed remuneration 28 – 35%

Performance related remuneration 65 – 72%

1. Annual Short-Term-Incentive (STI) (target: 100%) 28 – 35%,
thereof

- M&A (40 %)
- Revenue growth (20 %)
- EBITDA growth (20 %)
- EBITDA margin (20 %)

2. ESG bonus (short-term) 2 – 3%

3. Long-Term-Incentive (LTI): Stock options 29 – 42%

Sum 100%

Appendix

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Creating the leading European Specialty Pharma Platform

Company Presentation

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