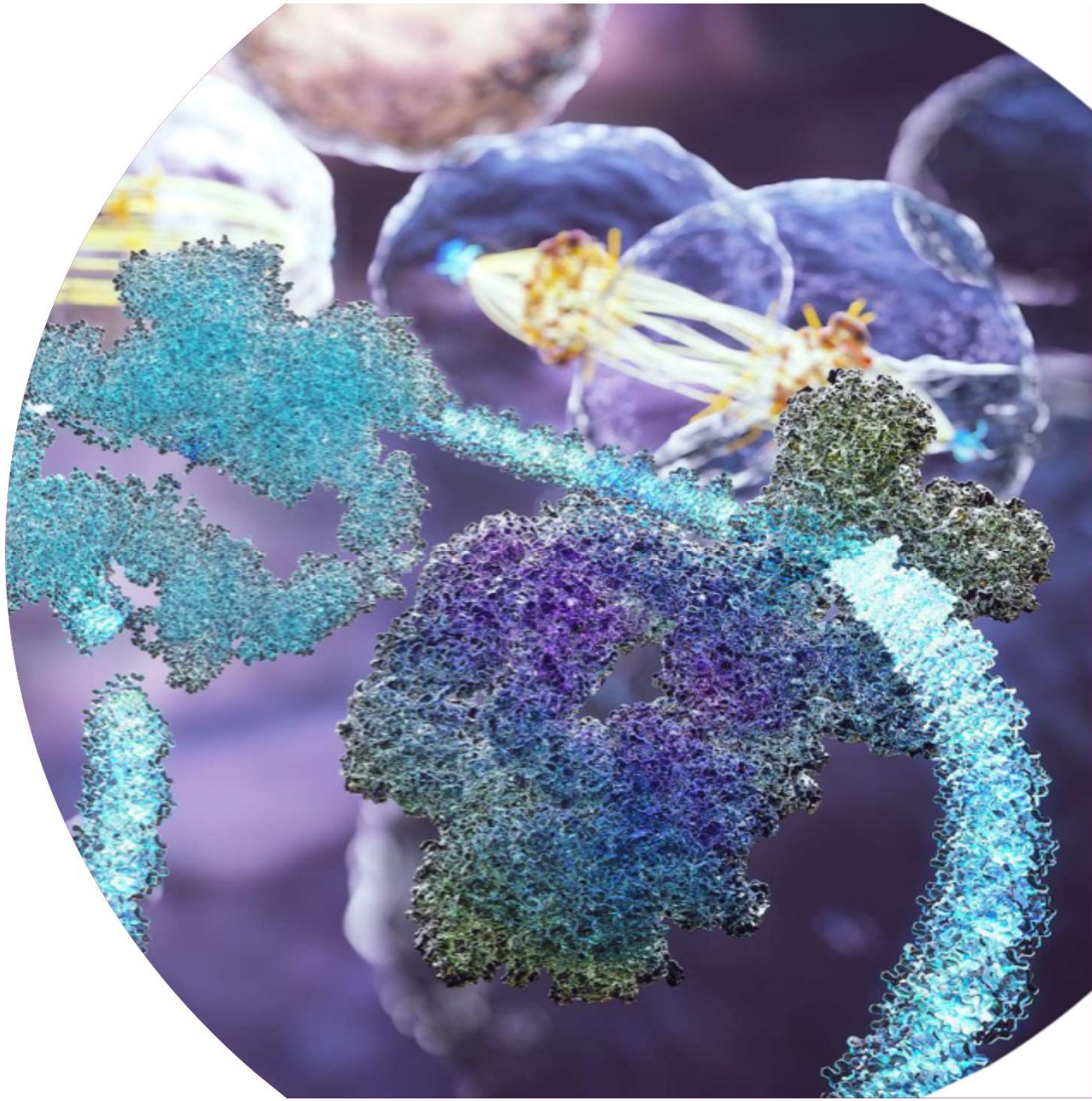
AstraZeneca

45th Annual General Meeting

Dr Sanjeev Panchal

Managing Director, AZPIL

8th August 2024



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AstraZeneca Pharma India Limited

Board Structure



Mr. Narayan K Seshadri*
Board Chairman



Ms. Revathy Ashok*
Director,
Nomination and Remuneration Committee, Chair -



Ms. Shilpa Divekar Nirula*
Director, Audit Committee Chair & Risk Management Committee Chair



Ms. Sylvia Varela
Non-Executive Director, Stakeholders' Relationship Committee Chair



Ms. Hooi Bien Chuah
Non-Executive Director, Corporate Social Responsibility Chair



Mr. Sanjeev Panchal
Managing Director



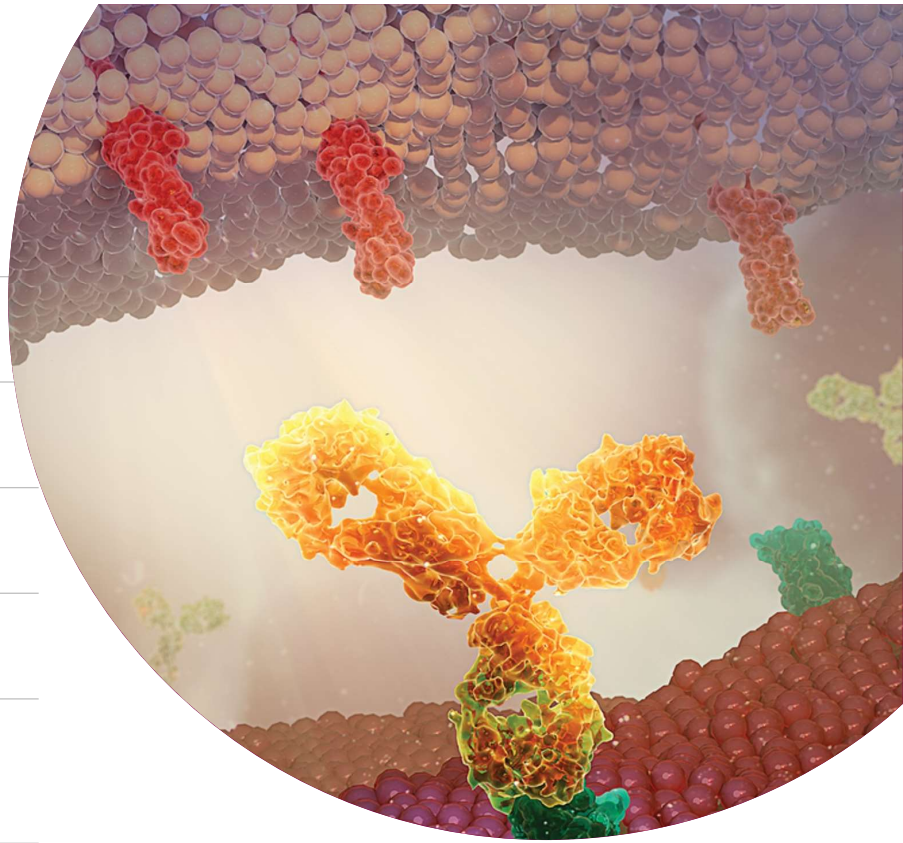
Ms. Bhavana Agrawal
CFO & Executive Director

Board Committees

- Audit Committee
- Stakeholders' Relationship Committee
- Corporate Social Responsibility Committee
- Nomination & Remuneration Committee
- Share Transfer Committee
- Risk Management Committee

* denotes independent directors

Agenda



- Global Update
- Industry Overview
- AZPIL Update
- Oncology
- BioPharmaceuticals
- Rare Disease
- Digital Transformation & Healthcare Innovation
- Sustainability
- Great Place to Work

Global Update

Delivered on our growth ambition

Total Revenue growth ambition to achieve >$45bn in 2023 set in 2014



Source: Total Revenue Growth ambition as shown in 2014

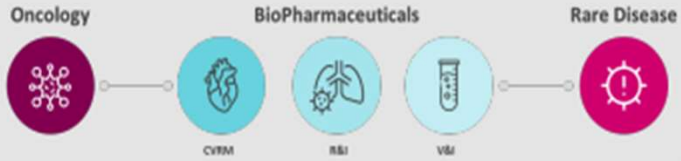
Source: AstraZeneca Global Year 2023 data

Culture of science-led innovation unlocked a decade of industry-leading growth

Follow the science

Disciplined investment

Focus

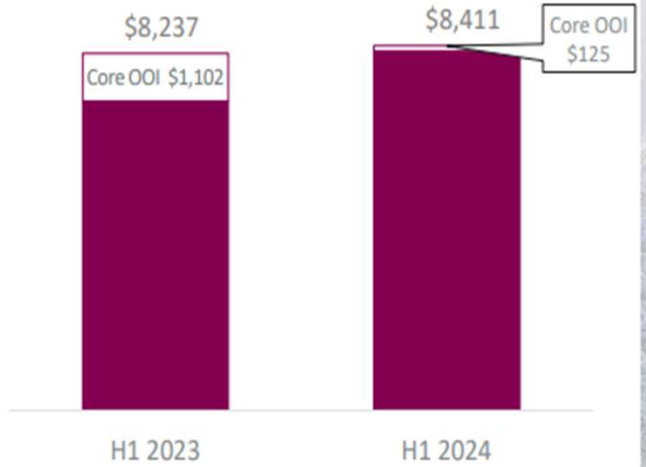


H1 2024 – strong underlying growth, Total Revenue +18%

Total Revenue | 18% CER



Core Operating Profit | 7% CER



Core EPS | 5% CER



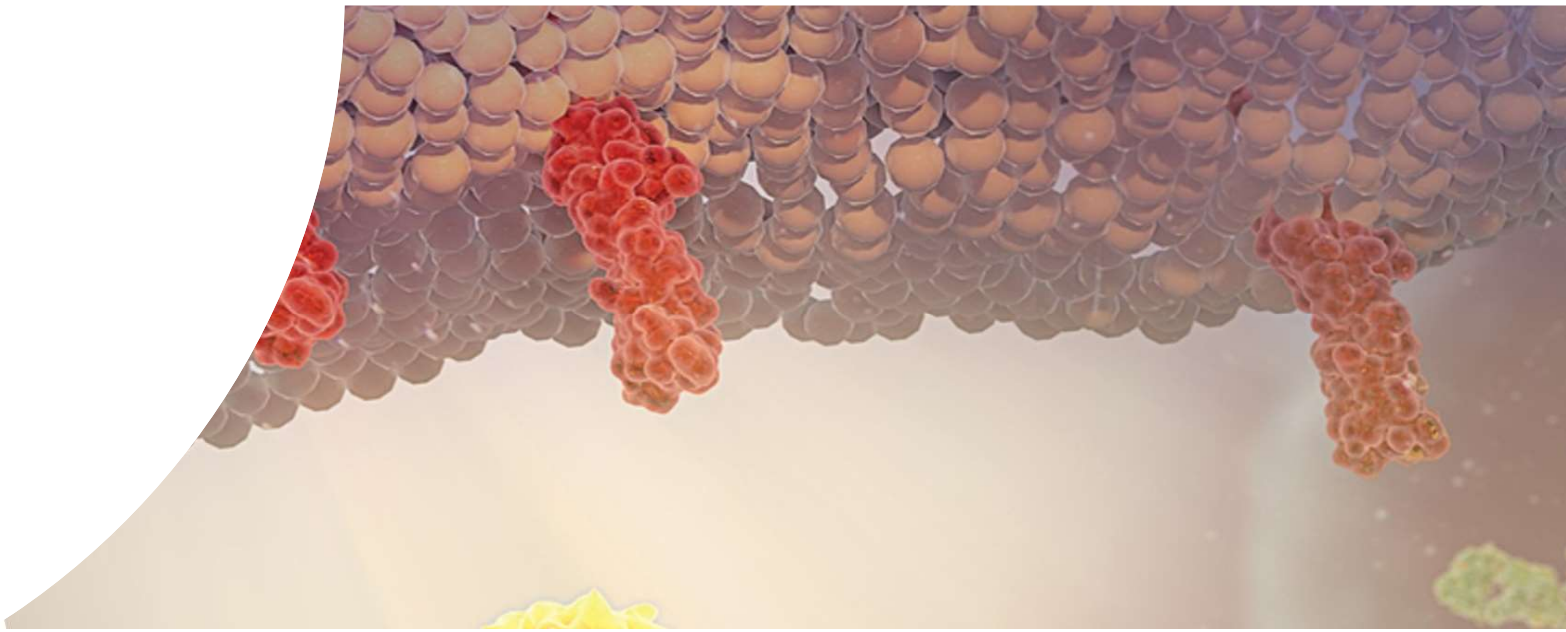
Upgraded FY 2024 guidance – Total Revenue and Core EPS expected to increase by mid teens percentage

Source: AstraZeneca Global H1 2024 results

India Market & Industry Overview



Dr Sanjeev Panchal
MANAGING DIRECTOR



Country Macro Economic Environment

8.2% GDP Growth

India's real GDP grew by 8.2% in FY 2023-24, exceeding 8% in 3 of the 4 quarters [1]

3rd largest Economy

India is projected to be among the fastest-growing economies to 2030, to become the world's 3rd -largest economy [2]

Ease of doing business

Improved in ease of doing business rank from 142nd in 2014 to 63rd in 2022 [3] [4]

2x GDP per capita

$2256 GDP per capita in 2021 to $5160 by 2030 [5]

Govt. Investment

In New India, Amrit Kaal budget expansion of ~24% from USD 142 bn in 2022-23 to USD176 bn in 2023-24 [6] with big focus on Infrastructure



45 YEARS OF AstraZeneca

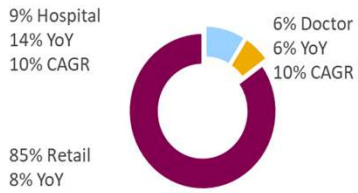
1. Press Information Bureau Release 2. Harvard edu 3.Economic survey 4.World Bank 5.International Monetary Fund 6. India Budget

Fastest growing amongst top 10 pharma companies | +3 ranks

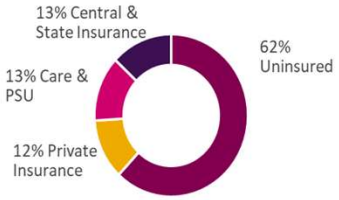
IPM (domestic) is a $26.5 bn market, poised to grow at a CAGR of 8.7% between 2023-2026

$26.5 bn

Channel Split



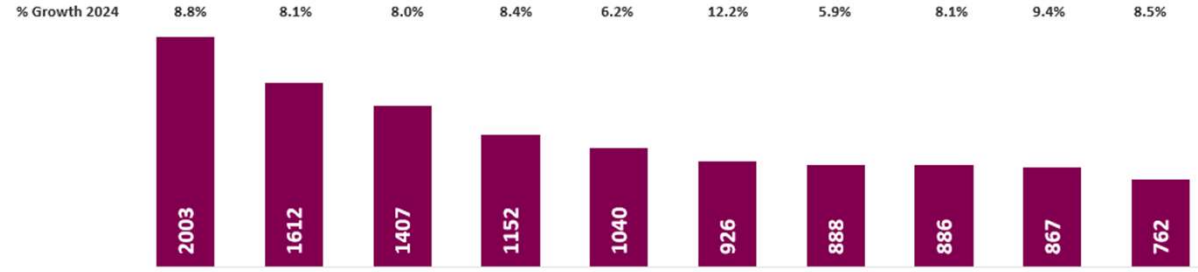
Health Insurance Scheme Type



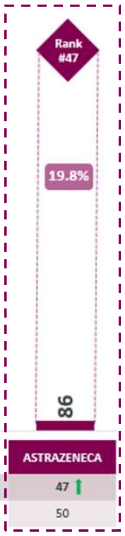
The market is dominated by large local companies

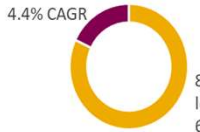
IQVIA MAT Mar'24 Sales (USD M)

Overall Gr%	Top 10 Gr%	Top 10 MNC Gr%	Az Gr%
7.6%	8.3%	7.6%	19.8%



Rank	SUN*	ABBOTT*	CIPLA	MANKIND	ALKEM*	INTAS PHARMA*	LUPIN LIMITED	TORRENT PHARMA*	MACLEODS PHARMA	ARISTO PHARMA*	ASTRAZENECA
2024	1 –	2 –	3 –	4 –	5 –	6 ↑	7 ↓	8 –	9 –	10 –	47 ↑
2023	1	2	3	4	5	7	6	8	9	10	50





600+ Corporates (~48 MNCs)

> 50,000 Brands

> 90,000 SKUs

~2,400 New products launched every year

Source: IQVIA Mat Mar'24

YOY: Year on Year; **MNCs**: Multinational Companies; **PSU**: Public Sector Units; **CAGR**: Compound Annual Growth Rate;

Propelling our Growth Through Innovation strategy

New launches Faster

9 regulatory approvals in FY 2023-24

- Oncology
- Biopharmaceuticals
- Rare Disease
  (approved in 2022 and launched in 2023)

Partnership for early diagnosis



MoU with Govt of Goa



MoU with Govt of Karnataka

Source: AstraZeneca Pharma India Ltd AR 2023-24

Bringing innovative medicines to India | Faster

6 new assets



Launched

Source: AstraZenca Pharma India Ltd AR 2023-24

AstraZeneca is amongst the fastest growing MNCs in IPM*

AstraZeneca

***Ranks 8th amongst MNCs** in IPM[2]*

***Oncology business ranks 3rd** in IPM[1]*

ENHERTU trastuzumab deruxtecan ***propelling** our **growth***

Lynparza olaparib tablets 150 mg

***No.1 Ovarian Cancer brand** & in top 10 Onco Brands in the country [1]*

TAGRISSO osimertinib

***No.1 lung cancer brand** & 3rd largest Onco brand in the country[1]*

BRILINTA ticagrelor tablets

*Sustains its **market leadership** in OAP (oral antiplatelet) market with **double digit** growth despite LoE[2]*

Fasenra (benralizumab) Subcutaneous injection 30 mg

*Launched in **April 2021**; is the **No.1 respiratory biologic** (by value) in the country.*

IMFINZI durvalumab Injection for Intravenous Use 50 mg/mL

*Fastest growing among **leading Oncology** brands, 6th largest Onco brand in country [1]*

45 YEARS OF AstraZeneca

1- Source: IPSOS Oncology Sales and Rx Audit- MAT Dec'23 Dataset
2- IQVIA MAT Mar'24

Continuing our strategic collaborations to further access – to be a Partner of choice



Partnership with **Mankind Pharma**



Partnership with **Roche Diagnostics**



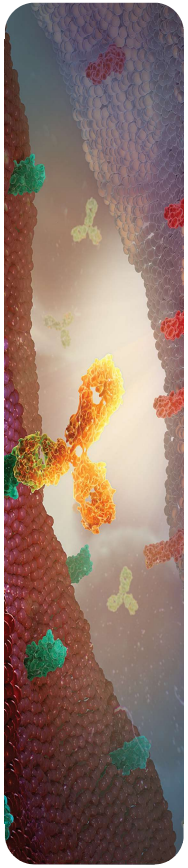
Severe Asthma **CoEs in Goa, Mumbai**



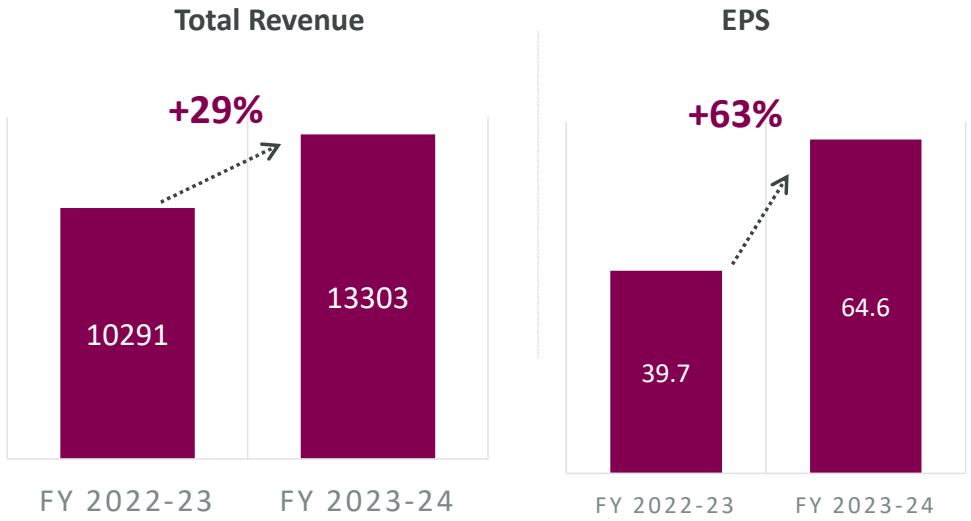
CoE at Rajiv Gandhi Cancer Institute and Research Center **(RGCI&RC)**

Source: AstraZenca Pharma India Ltd AR 2023-24

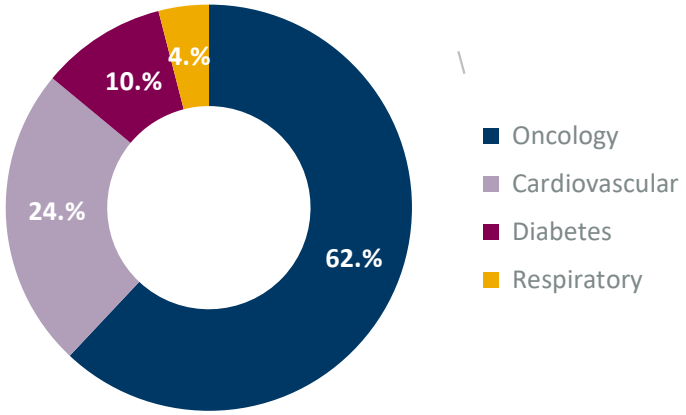
AstraZeneca India delivers strong double-digit growth



Strong commercial performance and financial execution in FY 2023-24



% Sales by therapy area



Financial snapshot of FY 2023-24[1]

Source: 1- Annual Report FY 2023-24

AZ India Trailblazing the ‘Pioneering in Science’ and bringing ‘Innovative Medicines’ to India Corporate Narrative

BW BUSINESSWORLD



Moving Towards More Specialist Type Of Portfolio In India: AstraZeneca | CNBC TV18

youtube.com

ET THE ECONOMIC TIMES



INTERVIEW

“We Want To Be Pioneers In Science”



‘Want to eliminate lung cancer as a cause of death in India’

Business Standard



Restoring Biodiversity: How AstraZeneca is moving ahead with India’s largest reforestation project

The CSR Universe
Conscious | Social | Responsible



AstraZeneca Bets on Licencing Deals, PPPs for India Growth

Local unit targets 15 launches till 2025, including novel products: Top exec

Pep Pill

45 YEARS OF AstraZeneca

Source: Stories in the media-publicly available

Winning accolades



2022-23: ET Best Healthcare Brands award



2023: AsiaOne G20 Healthcare Commitment Award as a testament to our commitment to the well-being



2023: Times Now 'Impactful CEOs' Sanjeev Panchal was recognised



2023: Great Place to Work' Certified" Sixth time in a row! Recognised among 100 Best Companies for Women for the sixth consecutive year



2024: ESG Champions of India 2024 in Biotechnology & Pharmaceuticals by Dun & Bradstreet India's



2024: BW People featured Amarpreet Kaur Ahuja among the **most influential woman in HR-2024!**



2023: Sustainability Initiative Award of the Year for our zero-carbon ambition and industry leading initiatives,



2023: Gold for Best Patient-Centric company in Cardiology by IHW Council



2023-24: Awarded Pharma InHouse Legal Team of the Year



2024: Diversity and Inclusion Award 2024 @ the 57th OPPI Annual Day

Source: Annual Report FY 2023-24

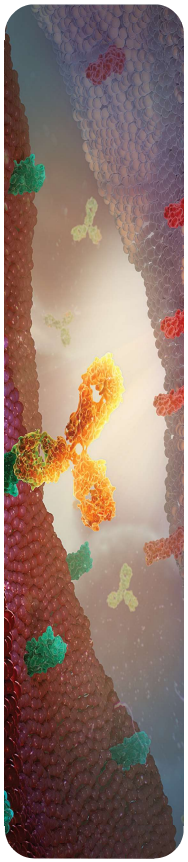
AstraZeneca

Oncology

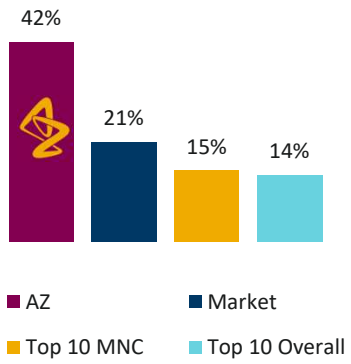


45 YEARS OF AstraZeneca

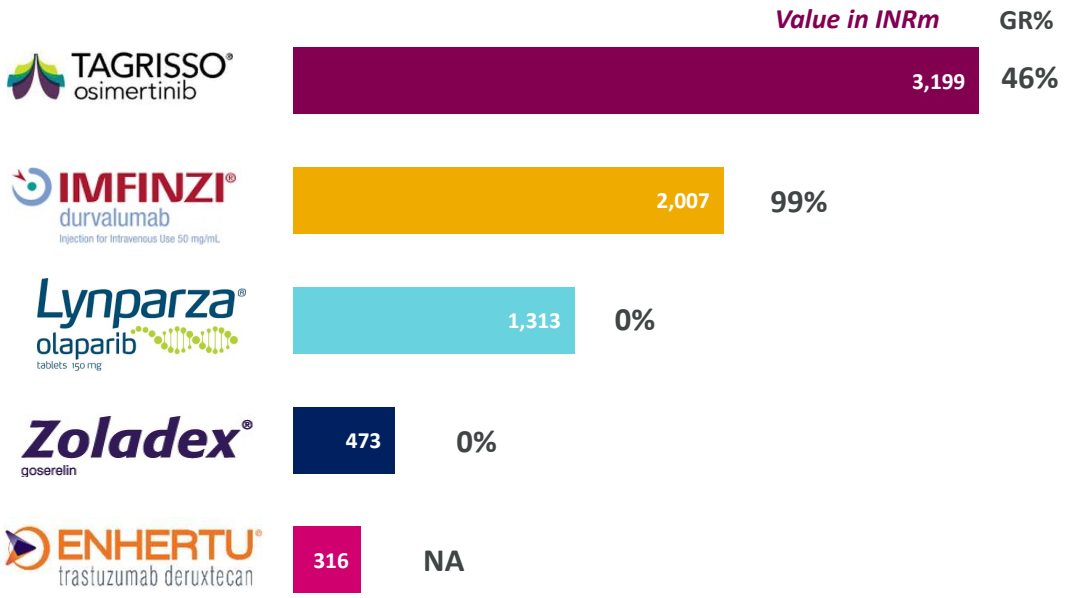
Our Oncology business is accelerating towards #1 position
Supported by Innovative Science



IPSOS GR% (MAT DEC 23 vs MAT DEC 22)



AZ Rank MAT Dec'23	3



(1) IPSOS, MAT Dec'23

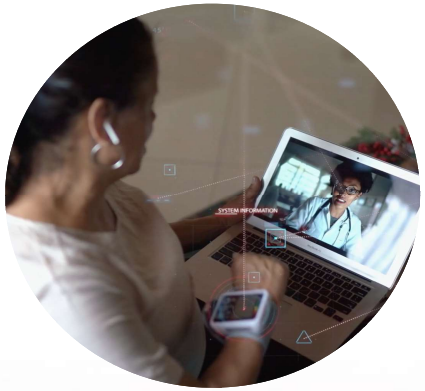
(2) Internal Records

Committed to transforming patient outcomes



Transforming Diagnostics

- India as **Hub of Molecular Dx**
- **Lung: Extended NGS panel**; 9 gene & 18 gene (1000+tests YTD)
- **Launch of CoE** for lung panel testing (RGCI) in Aug 2023 - 100 tests done
- **Launch of collaboration agreement for DDISH testing.** IHC & FISH testing access at 98 centres



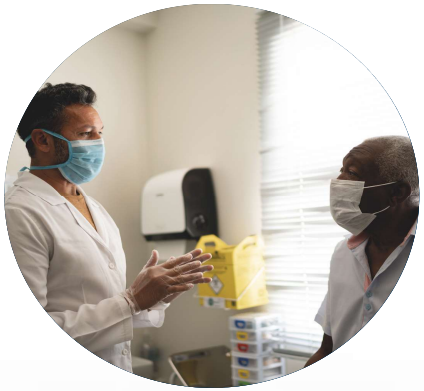
Embracing Digital

- **IHW forums** – Drive awareness on disease areas
- **Lung MITRA 2.0**: Leveraging Social Media to connect HCP to Pts.
- Leveraging Doctor Networking platforms for HCP outreach



Strengthening Partnerships

- **Technology**: qure.ai, Alveofit, TriCOG
- **Association**: MANTHAN-ISMPO, Onco-Path forums to build knowledge around Her 2 scoring, AOCN (Association of Child Neurology)



Innovative Access Programs

- **Patient Support Program**: SAHAY, Patient Navigator & Genetic Counsellors
- **Patient Affordability Program**: Enhanced support for patients through Tagrisso 2.0 & IMFINZI 2.0 PAP
- **Key inclusions:** Tagrisso part of ESI Rate contract (Largest social scheme in the world)

HRD – Homologous Recombinant Deficiency; YTD – Year till date; NGS – Next Generation sequencing; IHW – Integrated Health and Wellbeing Council; NF1 – Neurofibromatosis 1;
*Subject to approval, under discussion

Source: Annual Report FY 2023-24

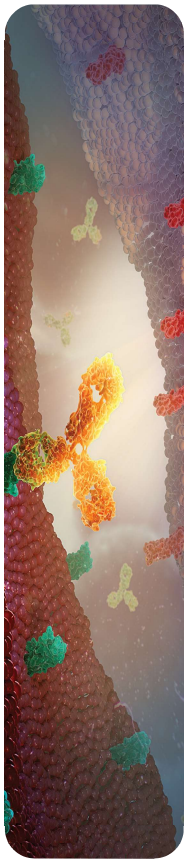
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Biopharmaceuticals

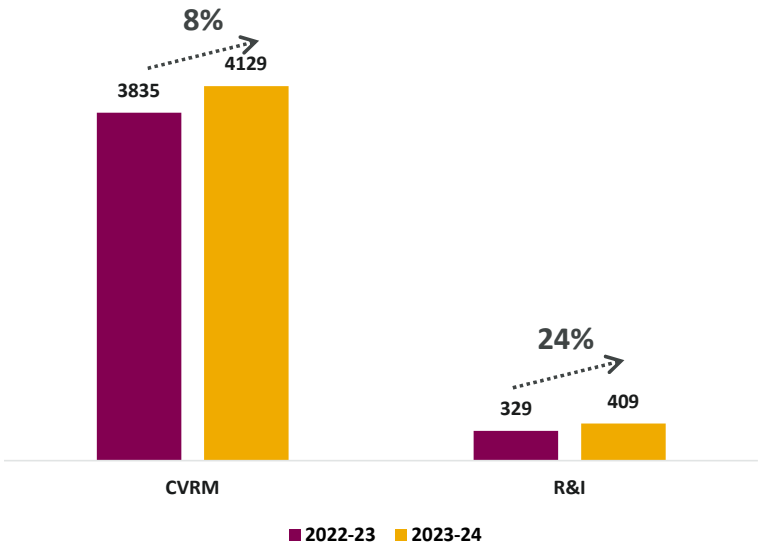


45 YEARS OF AstraZeneca

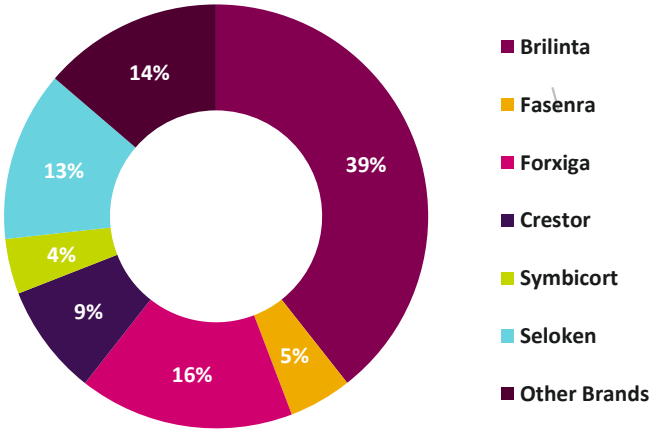
BioPharmaceuticals Business continues to grow



BBU TA Performance



% Sales by brands



CVRM portfolio grew by 8% despite of headwinds from generic brands. R&I expanding the reach with 24% growth vs LY.

 Source: Annual Report FY 2023-24

Stepping up Patient Centricity & Awareness

•**Community Education** through Social media | 300,000 Active Followers.

•Education content **reached 50 Million** users

•**100 LIVE Expert sessions** viewed by 6 Million users



•**Digital Cardiac Rehabilitation** for Heart Attack & Heart Failure Patients.

• Supporting **600 Cardiac centres countrywide**.

•**Patient Education** Programs covering 50 Topics across CVRM Disease spectrum.

120+ centers activated

~55,000 Patients screened in Jan-Jun'24

Indian Society of Nephrology

Source: Annual Report FY 2023-24

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Rare Disease



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Early Diagnosis and Access for Rare Diseases in India



Launched **the first and only approved therapy** for the treatment of pediatric patients with neurofibromatosis type 1 (**NF1**) | Selumetinib (Koselugo)

ORDI Organization for Rare Diseases India

RACE FOR 7

Rare Diseases | 7000 meters

Race for Seven with **ORDI- largest PAG on RD** in India to build **awareness**



Roundtable with **FICCI to widen the ambit of the diseases included in the National Policy for Rare Diseases,** increasing the number of Centers of Excellence

Source: Annual Report FY 2023-24

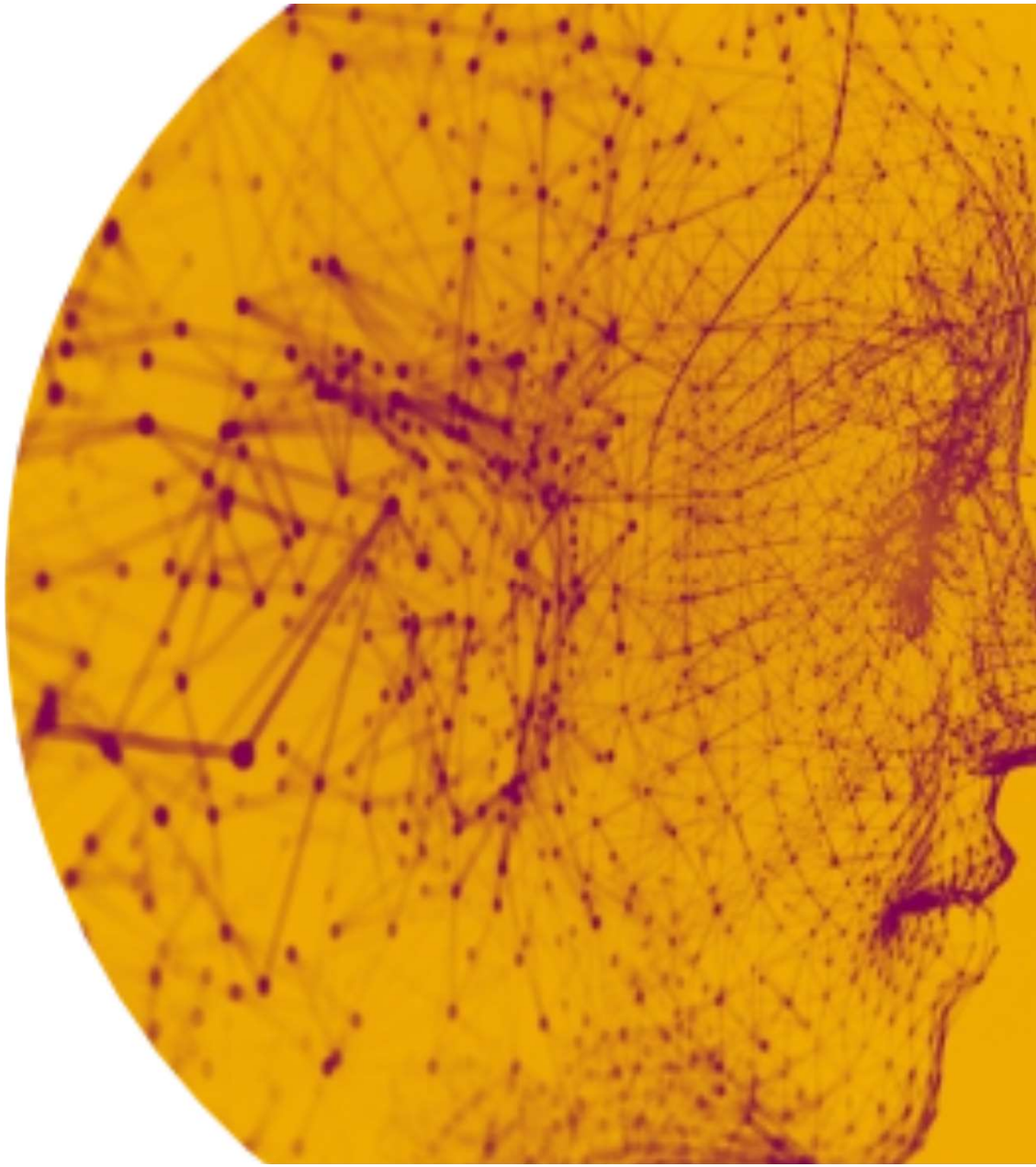
Commemorating Rare Disease Day with Sweden Embassy

Mobilizing influencers in the country to augment need for NPRD and inclusion of more diseases in India



AstraZeneca

Digital Transformation & Healthcare Innovation



45 YEARS OF AstraZeneca

Transforming patient lives by accelerating Digital adoption

A digital ecosystem powered by AI, Innovation, Analytics & Insights to effectively engage HCPs and patients

Digital & AI

5000+ whitespace HCPs reached through Digital channels by partnering with 3rd party Healthcare Data Tech partners.

The iPharmacy mobile app (e-learning) launched for Pharmacists with a new course and accomplished 7K registrations.

AZ ChatGPT has been launched for all AZ employees.

Accelerate delivery & innovation



AR tool for NF1 Awareness & Diagnosis launched a help **HCPs and patients** understand the disease & its symptoms

Analytics & Insights

Enpire enhancements were delivered to cater to business requirements for Brand Sharing and co-promotion features. Coaching Analytics covering **Reps to Managers.**

NRV Simplification To address the current business challenges, simplify the process, reduce manual efforts, and save business time.

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Sustainability



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Community Engagement

Ganga Godavari Cancer Screening Program (screening women for oral, breast and cervical cancer)

- Screened over **10,000 women across 125+ camps** across Delhi, Nasik, and Patna



Young Health Program

- Reached **over 95,000 youth**
- **Trained 145 youth** as peer educators
- Engaged **28 government stakeholders**



Improved Cookstoves Distribution for Women Empowerment

- Installed over **2500 cookstoves** in households across Jalna District, (Ambad and Ghanswangi and Jalna Block)
- Benefitted **~7,000–8,000 beneficiaries** directly and indirectly



AZ Forest

- **5,000 geo-tagged trees** at the Open-Air Jail in Devanahalli, Bangalore



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AZ Forest-
Global program

- **'Regeneration Meghalaya'** is a commitment to plant hope, nurture sustainability, and grow a future where nature and agriculture thrive in harmony.
- **30-year regenerative** horticulture and agriculture project in Meghalaya
- Plantation of **64 million trees**, **restoring 22,670 hectares of land**, supporting biodiversity and soil conservation, as well as climate and catchment health co-benefits







AstraZeneca

Great Place to Work



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Our GPTW Strategy is aligned to People development

INTERNAL PULSE SURVEY

89%

Employees believe AZ is a great place to work

89%

Employees believe strongly in AstraZeneca's future direction and key priorities.

87%

Managers in my function/company are committed to diversity and inclusion in the workplace

90%

Employees believe AZ demonstrates a commitment to the safety and wellbeing of employees.

EXTERNAL RECOGNITIONS

6

Years in a row - Certified

Great Place To Work. Certified OCT 2023 – OCT 2024 INDIA

Certified a **Great Place to Work** by GPTW Institute for the **Sixth consecutive year**

AVTAR & seramount BEST COMPANIES FOR WOMEN INDIA 2023

Recognised among **100 Best Companies for Women** by the Working Mother & Avtar Group, for the sixth year in a row

D&I HR Leader Of The Year

ASK INSIGHTS Diversity & Inclusion Consultants | TOI



BW BUSINESSWORLD

How AstraZeneca India brought down its women attrition rate by 50%

The women attrition level in the organisation has seen a 50 per cent drop this year from 30 per cent in 2021 to 15 per cent in 2023. To control the women attrition, the HR department has taken concerted efforts in terms of both building the environment and enriching the overall policies.

ET HRWorld

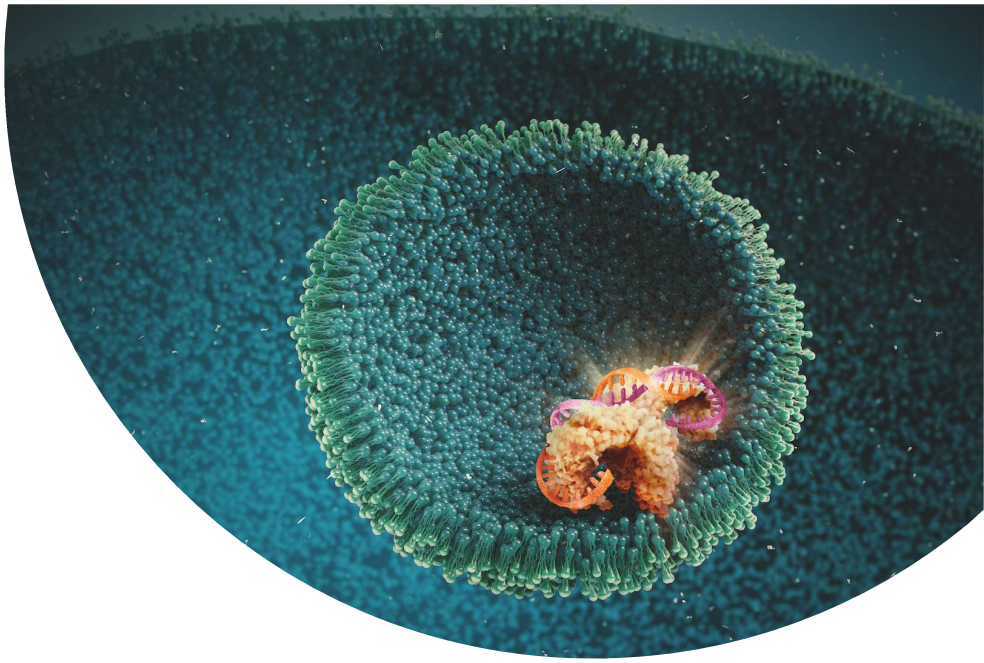
In Conversation With Amarpreet Kaur Ahuja, Country HR Director, AstraZeneca India

Building a strong employer brand is essential for attracting and retaining top talent says Ahuja in an exclusive conversation with Krishnendra Joshi, Editorial Lead, BW People

45 AstraZeneca

Source :Pulse Survey H2 2023, GPTW Certification, Working Mother and Avtar Best Companies for Women in India study

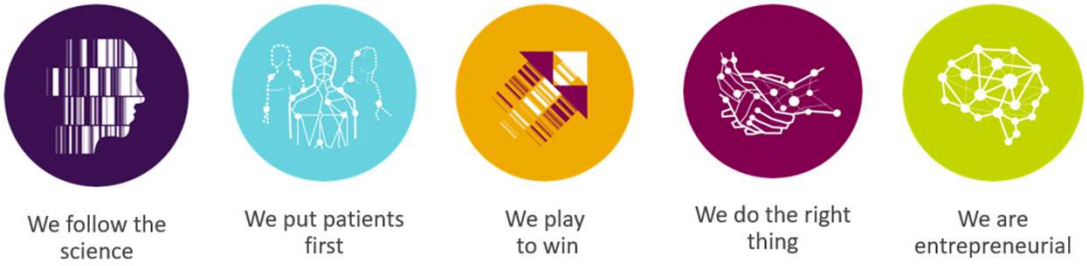
Inspired by our purpose and values, we're transforming the future of healthcare by unlocking the power of what science can do – for people, society and the planet.



Our purpose

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

Our values




45
YEARS OF
AstraZeneca

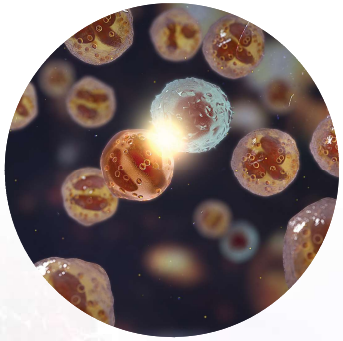


You can access the milestone book through our website: astrazeneca.in

Our Focus



Growth Through Innovation strategy | Science & Access



Expanding pipeline across all our TA-

Oncology, Biopharmaceutical, Rare Disease



Patient Centricity is central to everything we do | Continue partnering with the ecosystem



We are accelerating our Talent & Development agenda



Accelerating Ambition Zero Carbon

Thank you for your guidance and support for the past 12 years













Thank you