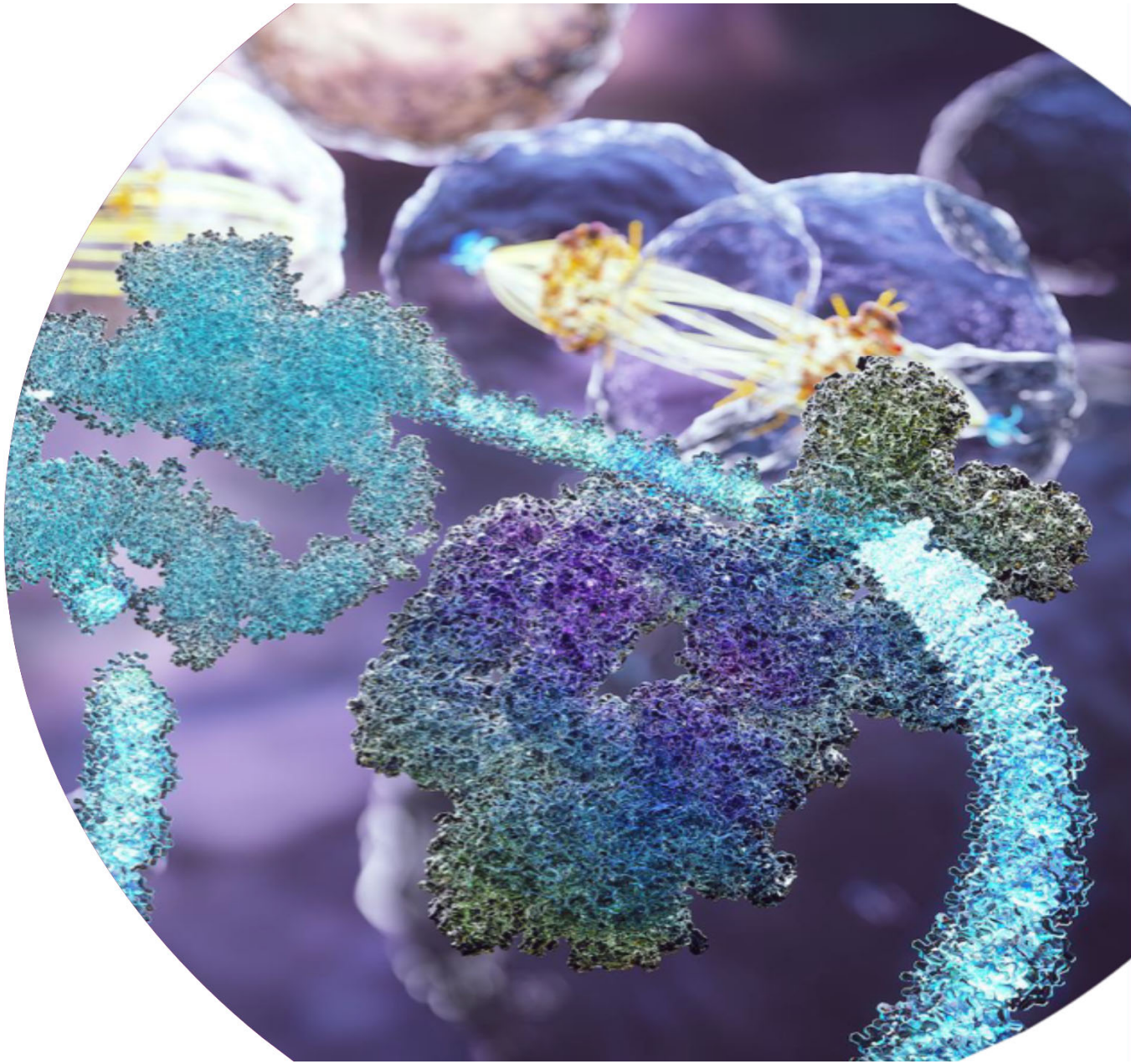
AstraZeneca

44th Annual General Meeting

Dr Sanjeev Panchal

14th August 2023

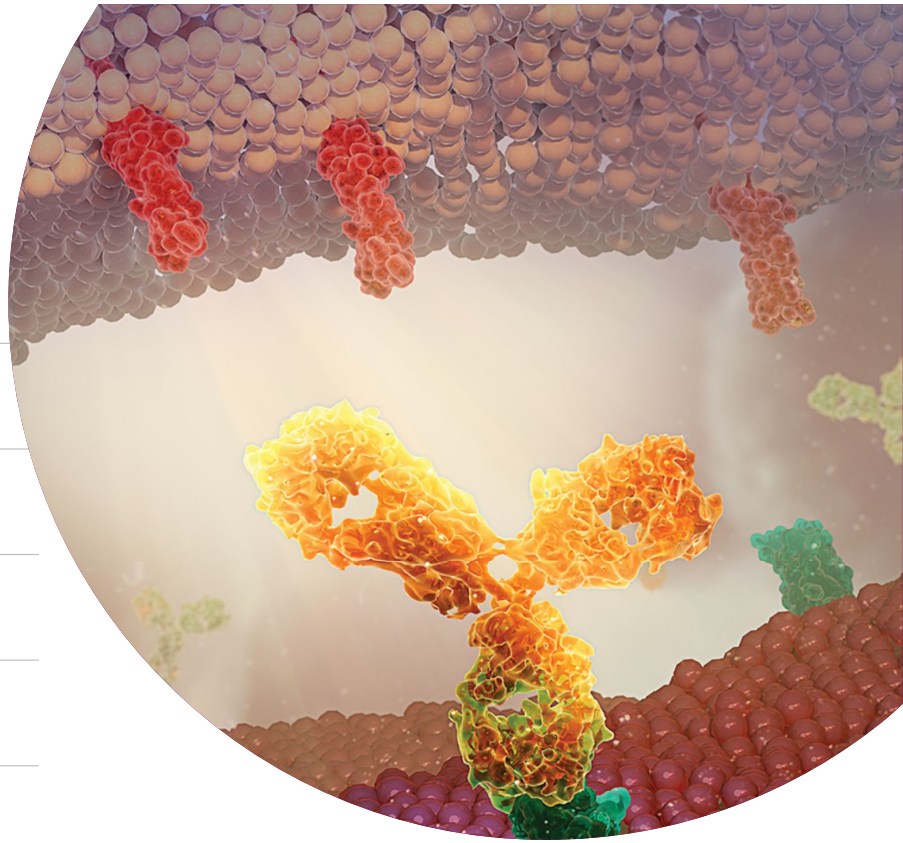


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Agenda



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

AZPIL

Board Structure



Mr. Narayan K Seshadri*
Board Chairman



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



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



Ms. Sarah Wang
Non Executive Director, CSR Comm. & Stakeholders' Relationship Committee Chair



Mr. Ankush Nandra
Non-Executive Director



Mr. Sanjeev Panchal
Managing Director



Mr. Rajesh Marwaha
Executive Director & CFO

Board Committees

- Audit Committee
- Stakeholders' Relationship Committee
- Corporate Social Responsibility Committee

- Nomination & Remuneration Committee
- Share Transfer Committee
- Risk Management Committee

* denotes independent directors

Global Update

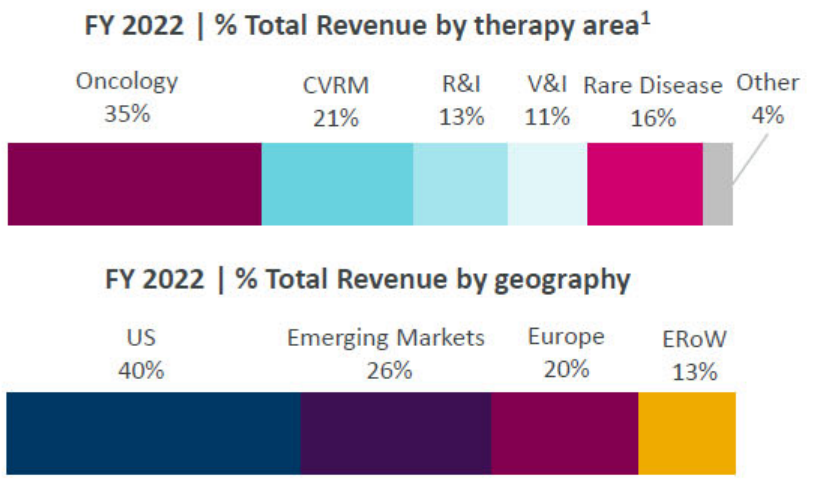
AstraZeneca Global 2022 performance

Strong FY 2022 - well positioned to deliver future growth

Delivered on our upgraded FY 2022 guidance



Broad-based, diverse source of business

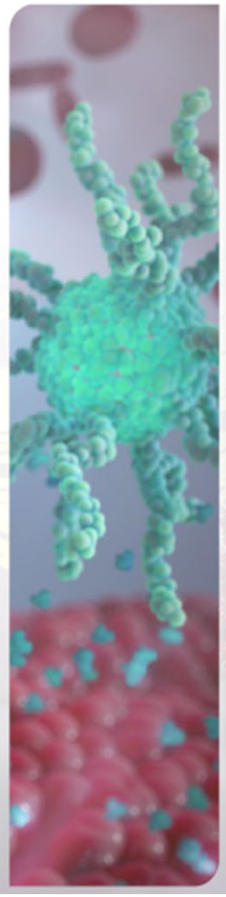


2023 Guidance: Core EPS to increase by a high single-digit to low double-digit %

1. *Koselugo* Total Revenue is included in Rare Disease (FY 2021: Oncology) and *Andexxa* Total Revenue is included in BioPharmaceuticals (FY 2021: Rare Disease). Growth rates for CVRM and Rare Disease are pro forma. Total Revenue and Core EPS increases benefitted from the addition of Alexion effective 21stJuly 2021. CER = Constant Exchange Rates; EPS = Earnings Per Share; CVRM = Cardiovascular, Renal & Metabolism; R&I = Respiratory & Immunology; V&I = Vaccines & Immune Therapies; ERoW = Established Rest of World.

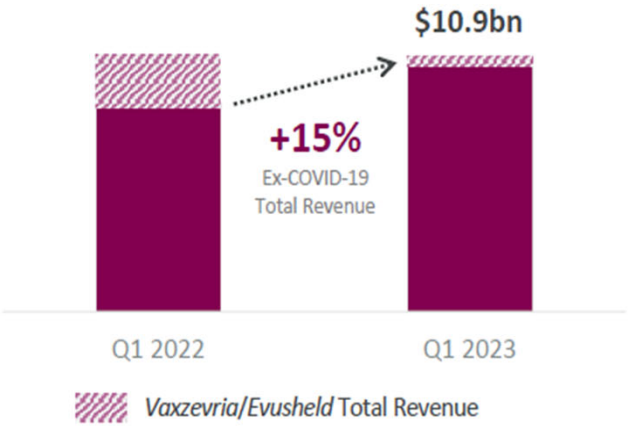
Source: Full Year 2022 presentation

Q1 2023 – 15% growth from ex-COVID-19 medicines[1]

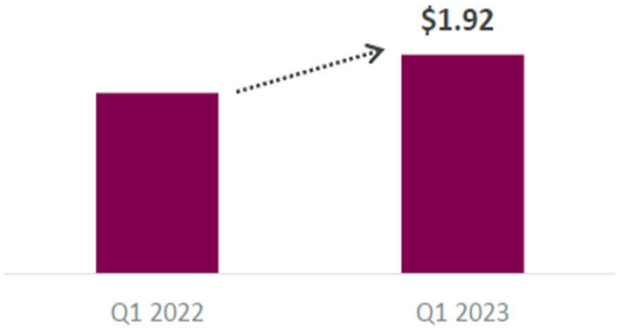


Growth in Oncology, CVRM, R&I and Rare Disease offset decline in COVID-19 medicines

Total Revenue | stable CER



Core EPS | +6% CER



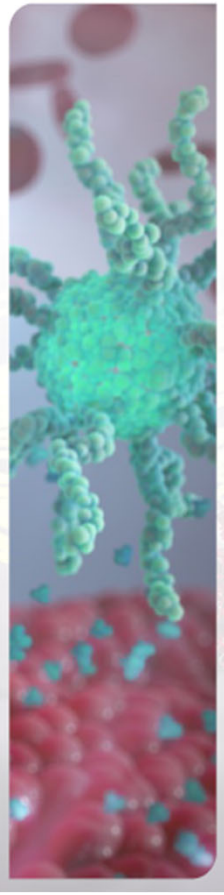
Reiterating 2023 guidance: Core EPS to increase by a high single-digit to low double-digit %

All growth rates at CER.

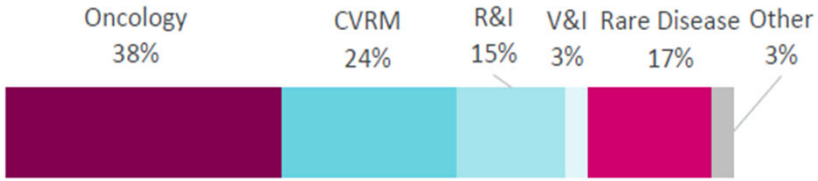
1. *Vaxzevria*, *Evusheld* and AZD3152; CER = constant exchange rates; EPS = earnings per share.

Source: Q1-2023-results-presentation

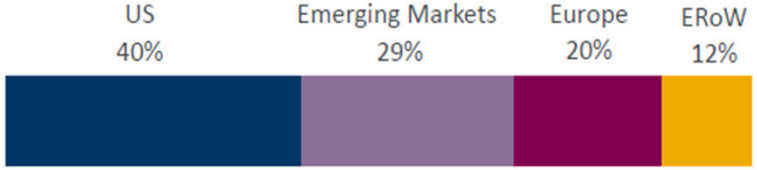
Q1 2023- broad-based, diverse source of business



Q1 2023 | % Total Revenue by therapy area



Q1 2023 | % Total Revenue by geography



- Strong growth across Oncology, CVRM, R&I and Rare Disease
- Emerging Markets presence and strong growth
- Value-enhancing business development strengthening growing pipeline
- Increasing pipeline momentum

Industry-leading outlook underpinned by broad portfolio and geographic footprint

All growth rates in CER.
CVRM = Cardiovascular, Renal & Metabolism; R&I = Respiratory & Immunology; V&I = Vaccines & Immune Therapies; ERoW= Established Rest of World.
Source: Q1-2023-results-presentation



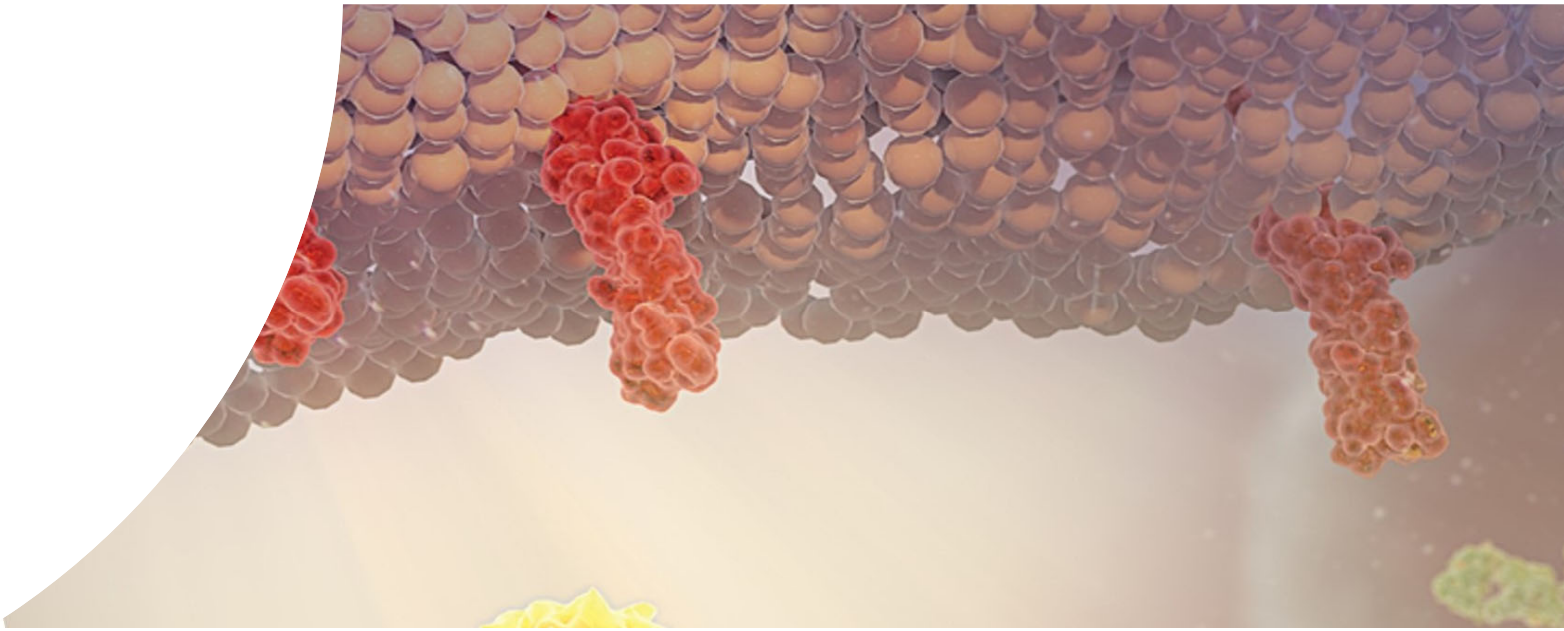
*"Each of our non-COVID-19 therapy areas saw **double-digit revenue growth**, with **eight medicines** delivering more than **$1bn of revenue** in the first half, demonstrating the strength of our business. Several medicines grew rapidly including **Ultomiris**, **Imfinzi/Imjudo and Farxiga**, with revenues up **64%, 57% and 40% respectively**. Our pipeline momentum continues with **eight positive pivotal trials** for our Oncology medicines so far this year, and we are encouraged by the positive data from **TROPION-Lung01**, the first pivotal trial of datopotamab deruxtecan. We look forward to sharing the data with the medical community at an upcoming medical congress and are proceeding to file the data with the US Food and Drug Administration. And finally, as part of our flagship sustainability program, **Ambition Zero Carbon**, we announced **a $400m investment in AZ Forest**, raising our commitment to **plant 200 million trees by 2030**."*

Pascal Soriot
Chief Executive Officer, AstraZeneca

India Market & Industry Overview

Dr Sanjeev Panchal
MANAGING DIRECTOR





Country Macro Economic Environment

6.3% GDP CAGR

India's GDP growth to average 6.3 per cent annually between financial years 2021 and 2030 [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





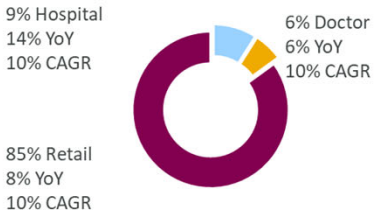
1. Press Information Bureau 2. Harvard edu 3.Economic survey 4.World Bank 5.International Monetary Fund 6. India Budget

Indian Pharma Market (IPM) highly competitive, urban-centric and largely OOP market

IPM (domestic) is a $23 bn market, poised to grow 9%YOY between 2023-2025

$ 23 Billion

Channel Split



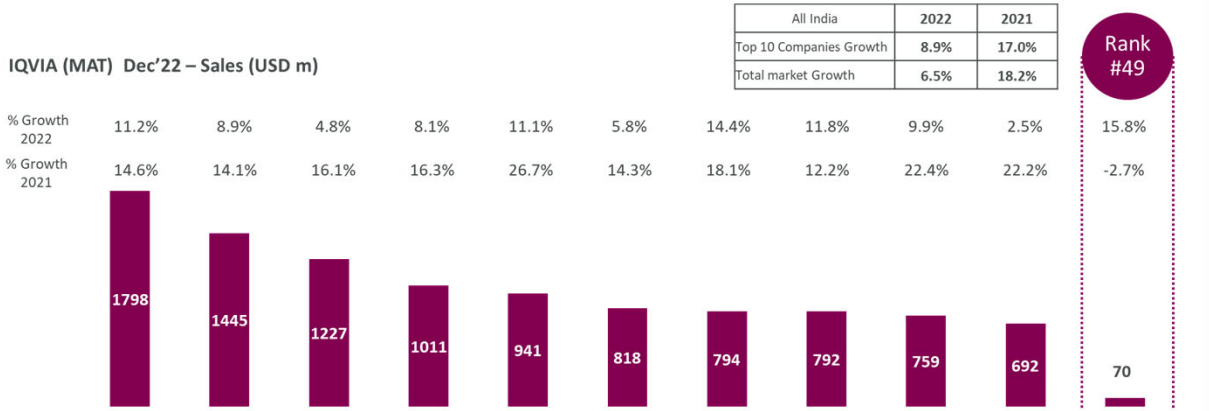
Health Insurance Scheme Type



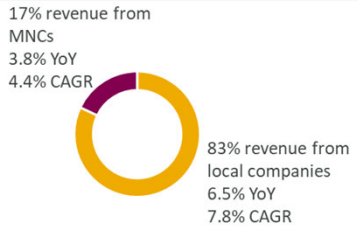
The market dominated by large local companies

All India	2022	2021
Top 10 Companies Growth	8.9%	17.0%
Total market Growth	6.5%	18.2%

IQVIA (MAT) Dec'22 – Sales (USD m)



Rank	SUN*	ABBOTT*	CIPLA	MANKIND	ALKEM*	LUPIN LIMITED	INTAS PHARMA*	TORRENT PHARMA*	MACLEODS PHARMA	DR REDDYS LABS	ASTRAZENECA
2022	1	2	3	4	5	6	7 ↑	8 ↓	9	10	49 ↑
2021	1	2	3	4	5	6	8	7	9	10	56
2020	1	2	3	4	6	5	8	7	9	10	51



600+ Corporates (~48 MNCs)

> 50,000 Brands

> 90,000 SKUs

~2,400 New products launched every year

Source: IQVIA Mat Dec'22

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

AstraZeneca ranks 10th and is amongst the fastest growing MNCs in IPM*

AstraZeneca

***3rd Fastest** growing **Onco**. Company in India*[1]

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

*Continues to be **No.1 leading brand in Oral Anti Platelets** market despite LoE*[2]

Fasenra™ (benralizumab) Subcutaneous Injection 30 mg

*Launched in **April 2021**; Has touched the lives of **>900 patients**, outperforming omalizumab brands*

IMFINZI® durvalumab Injection for Intravenous Use 50 mg/mL

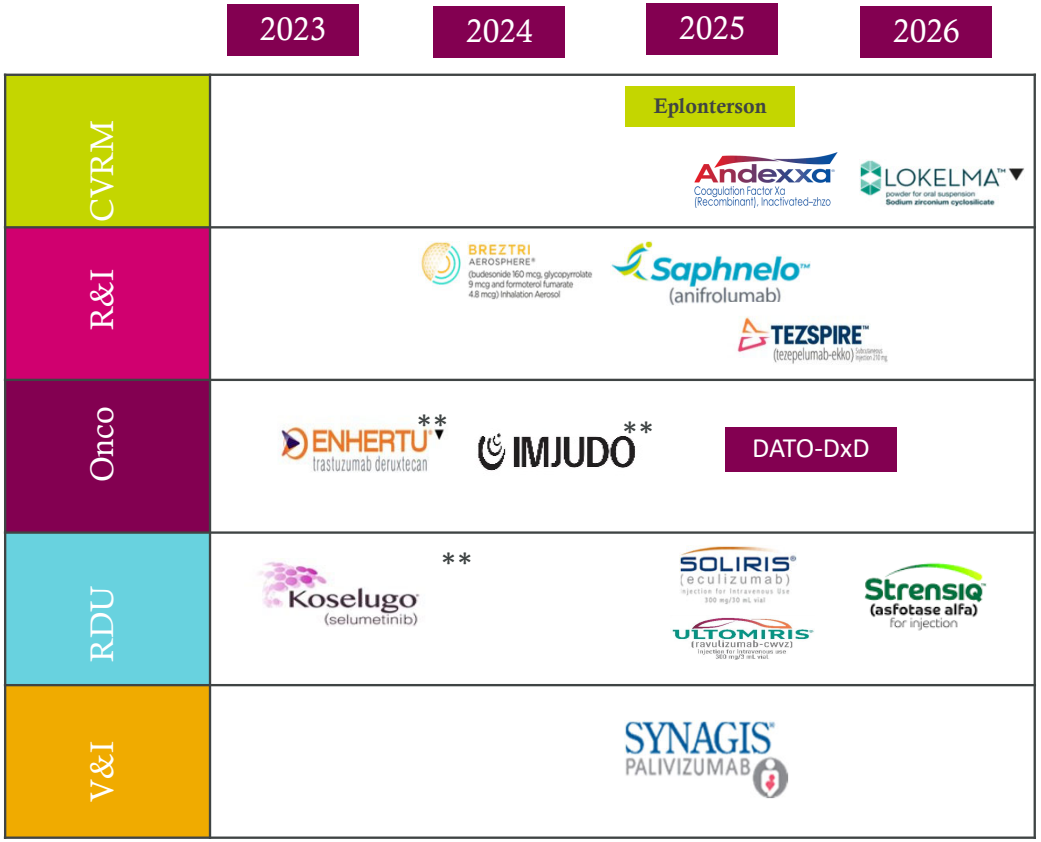
*Fastest growing among **leading Immuno-Oncology** brands*[1]

1- Source: IPSOS Oncology Sales and Rx Audit- MAT Dec'22 Dataset
2- IQVIA MAT June 2022

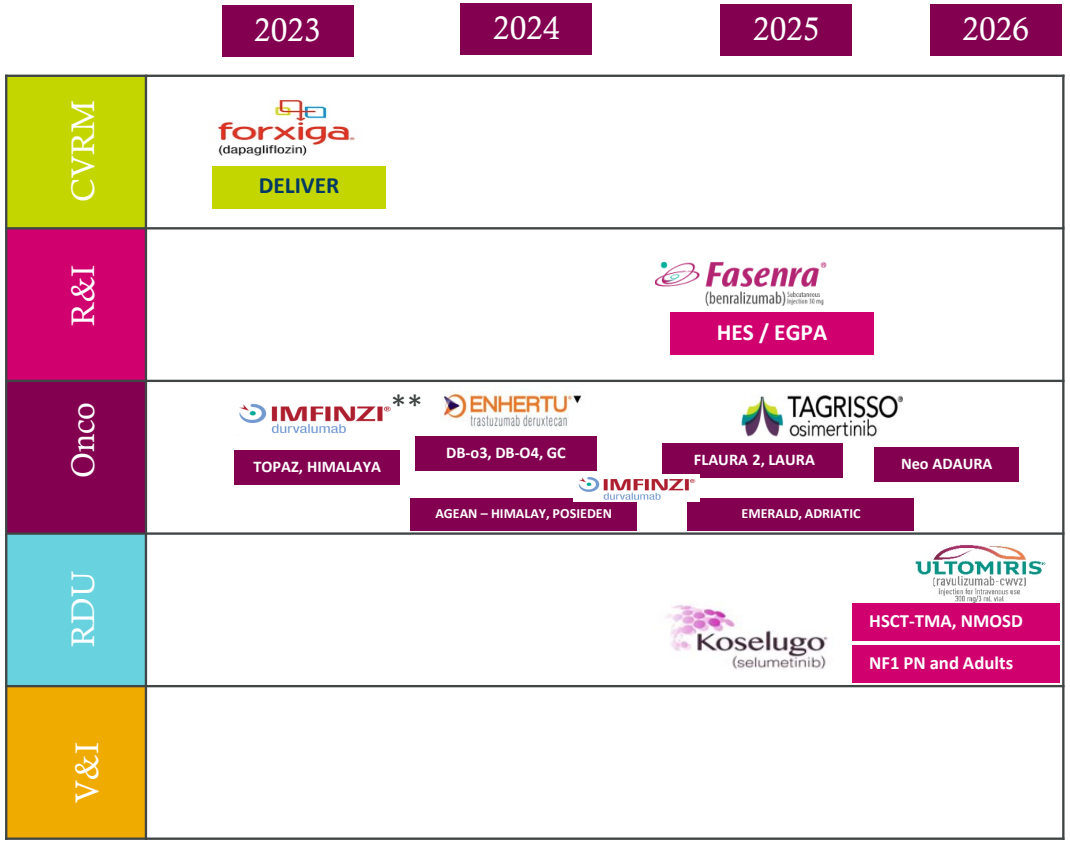
Committed to impact patients lives, advancing our industry leading pipelines

Regulatory submission timelines

New Assets



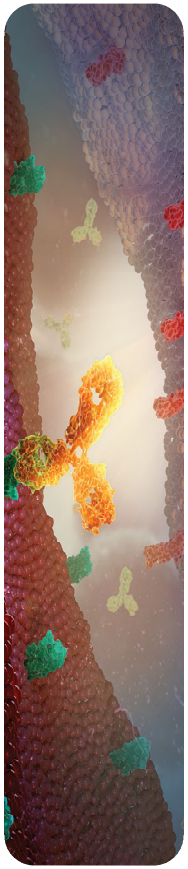
New Indications



*Launch is subject to positive results, regulatory approval and commercial viability. Launch timeline assumed at ~21 months from regulatory submission in base case including standard regulatory and supply timelines.
** Received DCGI Approval in 2023

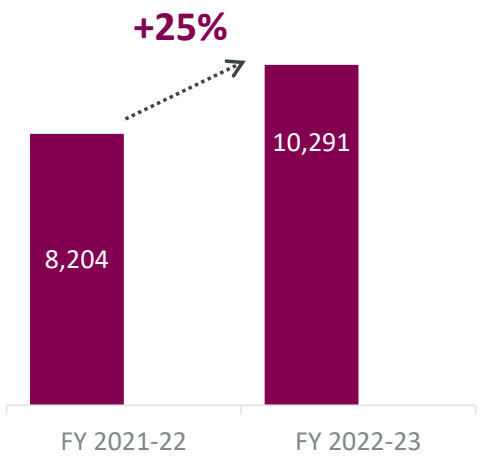
AstraZeneca India delivers strong double-digit growth

Poised to continue momentum despite generic proliferation in Dapagliflozin & Oncology market

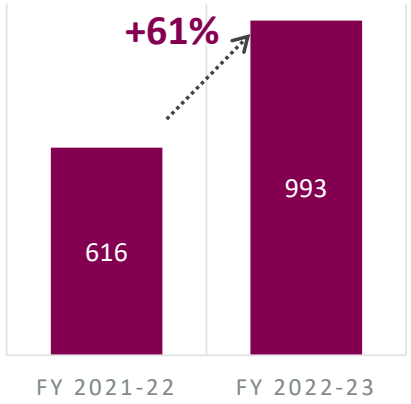


Strong commercial performance and financial execution in FY 2022-23

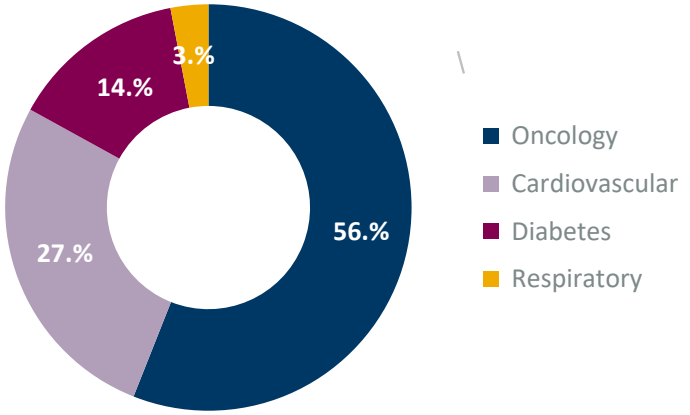
Total Revenue



Profit for the year



% Sales by therapy area



Financial snapshot of FY 2022-23[1]

Source: 1- Annual Report FY 2022-23

AstraZeneca

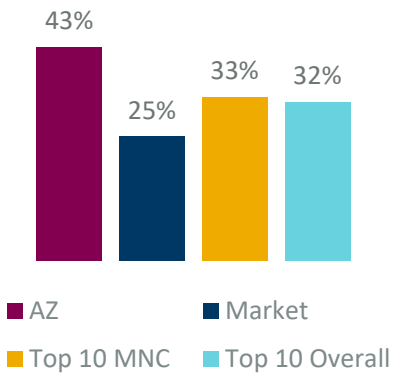
Oncology



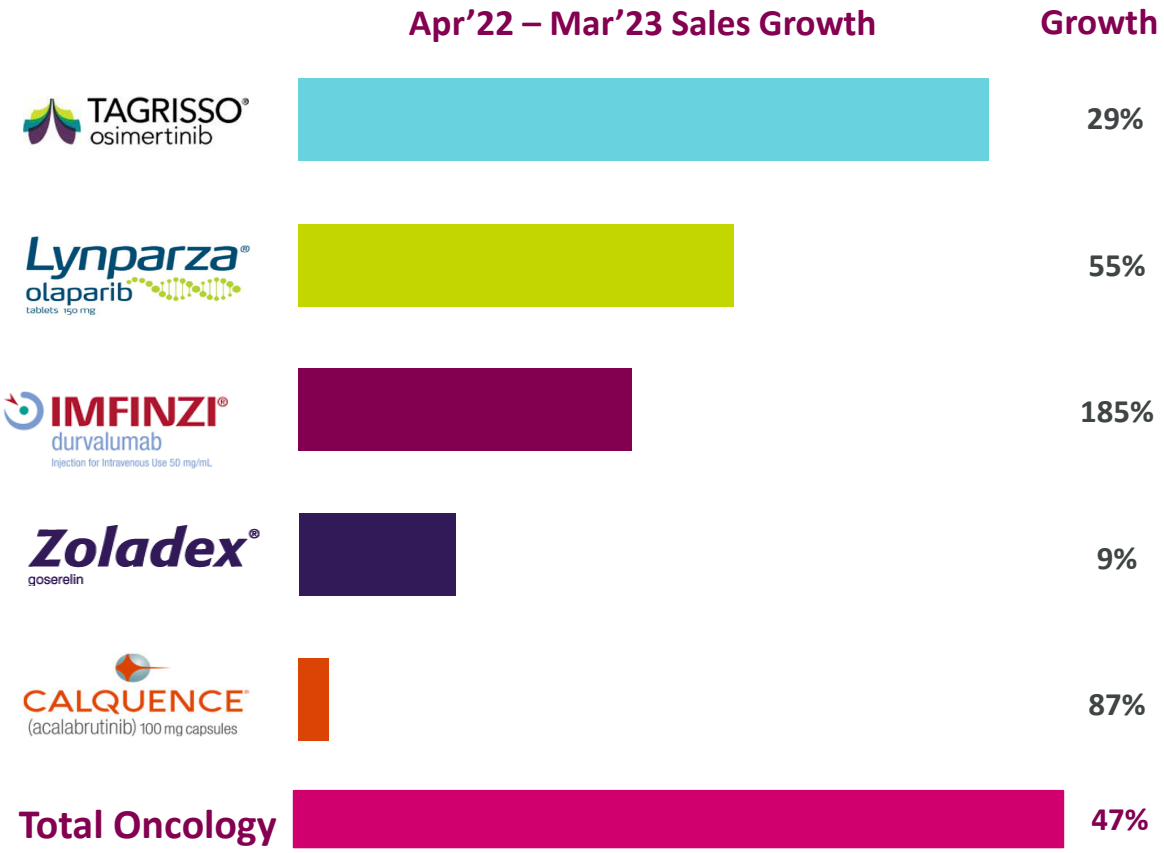
Our Oncology business is accelerating towards *#1* position supported by *Innovative Science*

Oncology

IPSOS GR% (MAT DEC 22 vs MAT DEC 21)
Percent



AZ Rank (2022)	3 ↑
AZ Rank (2021)	5
AZ Rank (2019)	10



(1) IPSOS, MAT Dec'22

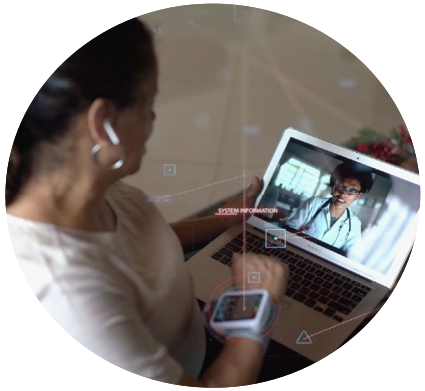
(2) Internal Records

Committed to transforming patient outcomes



Transforming Diagnostics

- India as **Hub of Molecular Dx**
- **Women: > 2.5K Pts**. supported through Pink DoT campaign & HRD YTD
- **Lung: Extended NGS panel**; 9 gene & 18 gene (600 tests YTD)
- **Launch of CoE** for lung panel testing (RGCI) in Aug 2023



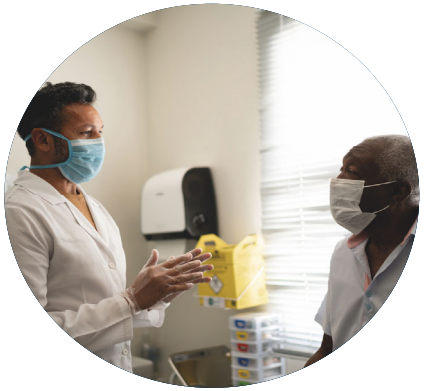
Embracing Digital

- **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
- **NF1 awareness** & diagnostic tool powered by AI & 3D imaging



Strengthening Partnerships

- **Technology**: qure.ai, Alveofit, TriCOG
- **Hospital**: Partnering with Tata hospital, Varanasi to improve patient outcomes with GI cancers
- **Association**: MANTHAN-ISMPO, Integrated Cancer Education in association with Indian Oncology Foundation



Innovative Access Programs

- **Patient Support Program**: SAHAY, Patient Navigator & Genetic Counsellors
- **Patient Affordability Program**: Tiered-pricing strategies to solve access
- **Innovative Value Solutions**: Microfinancing, Pay for Performance

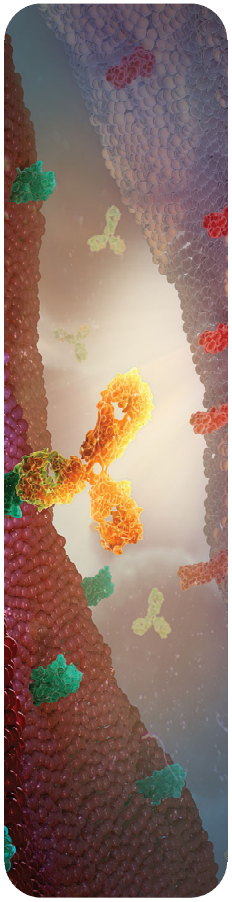
HRD – Homologous Recombinant Deficiency; YTD – Year till date; NGS – Next Generation sequencing; IHW – Integrated Health and Wellbeing Council; NF1 – Neurofibromatosis 1;
*Subject to approval, under discussion

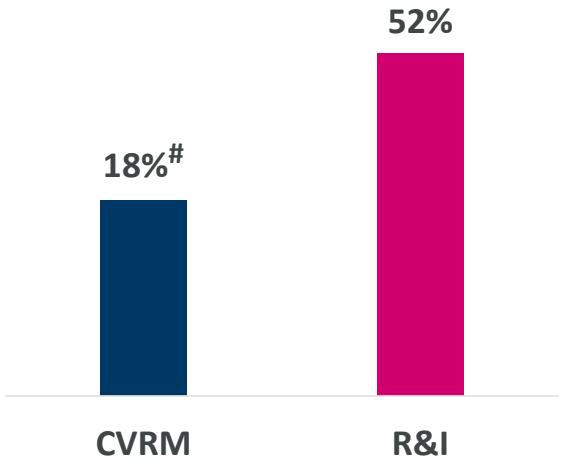
AstraZeneca

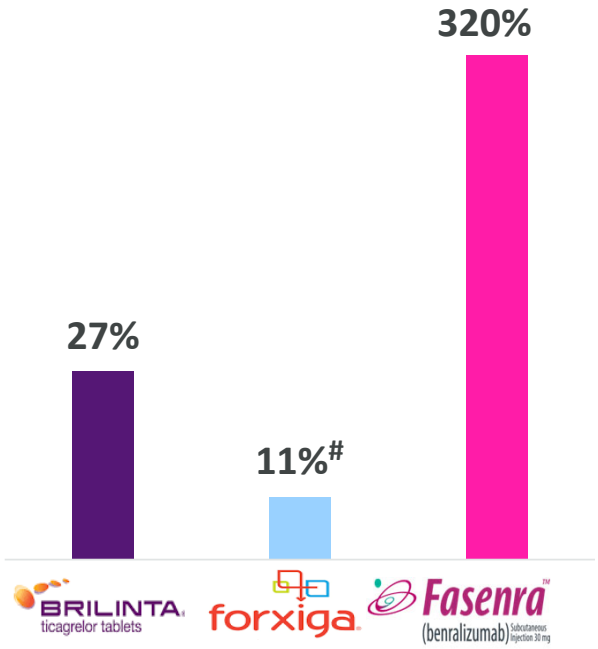
BioPharmaceuticals



BioPharmaceuticals Business continues to grow







~3000

Scientific Events

FY 22-23

CVRM & R&I TA (FY 22-23)

BBU Growth Across The Brands (FY 22-23)

Science Dissemination Intensified to ensure high SoV

Source: Internal Sales Data

Ex –divestment

Stepping up Patient Centricity & Partnerships

130,000 active followers. 20 Mio + Unique Reach & 3 Million + video views of 40 LIVE KEE Sessions

19,962 ECGs done with 50% abnormal findings, through 28 Hubs & connected spokes.

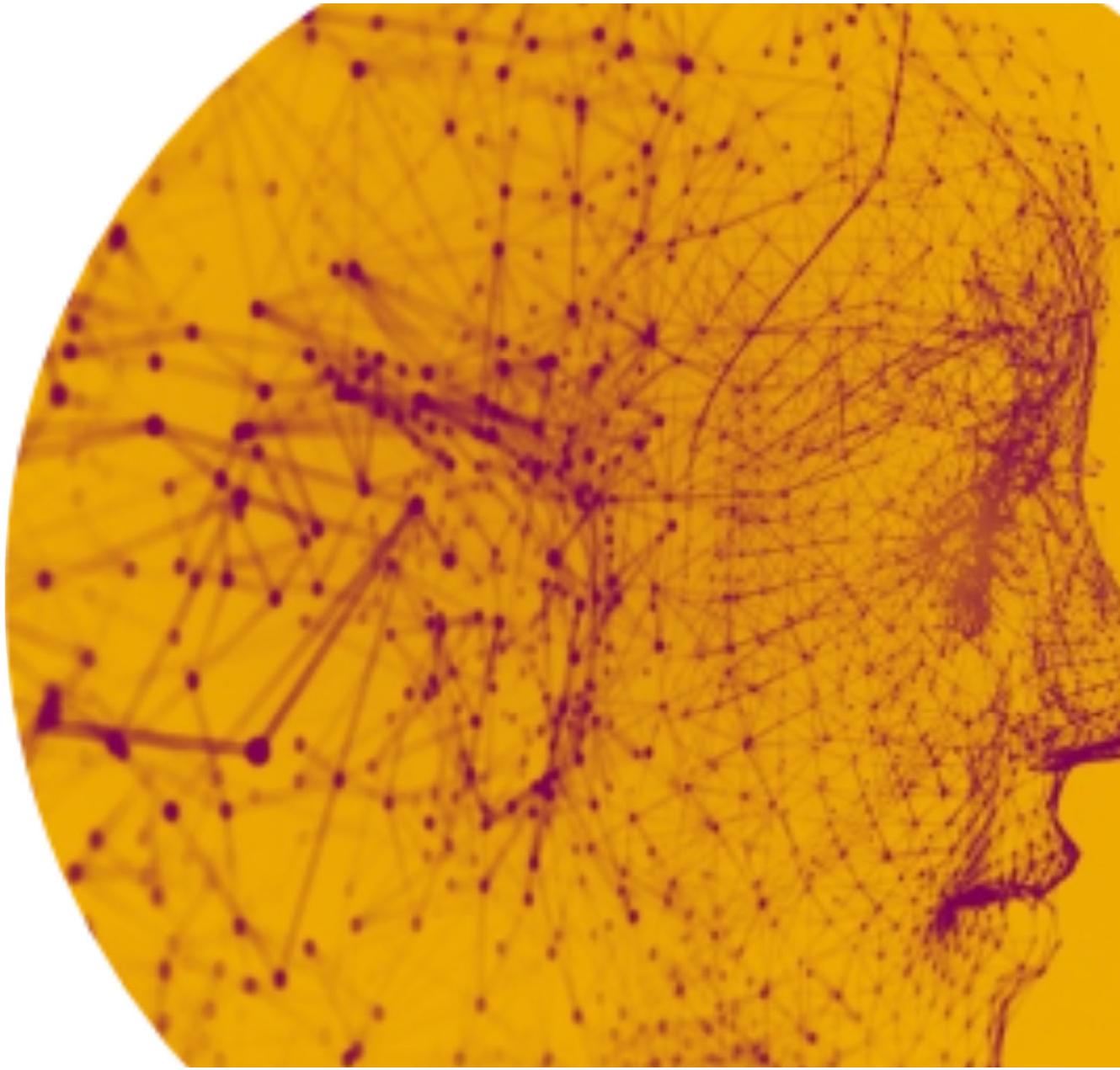
300+ Patient Education Programs done by 200+ unique HCPs for their patients

58 centers activated

62,700 of Patients screened

AstraZeneca

Digital Transformation & Healthcare Innovation



2022 has been a year of digital acceleration and adoption of solutions across the business



Lead with AI & Insights

enpire

Data automation by powering smart capabilities at scale ***helped in a significant reduction in response time*** to generate sales reports.

Omni Track

A platform to consolidate and gather insights from omnichannel campaigns ***launched in India.***



Accelerate delivery & innovation

AZCares

PSP program launched, with a compliant and intelligent technology platform that ***connects*** the ecosystem of -***Service Providers + Patients + Distributors + Field & Tele councilors*** to provide a better patient experience.

AZ MEDCONNECT

India HCP Portal launched, a one-stop platform for HCPs to get information about our products, therapeutic areas, and upcoming events



Optimize how we run



To accelerate digital delivery and bring down the cost on creative spends, the IT team had set up an in-house designer team to support business functions.

SAP pharmarack

Data interface and integration for ***project RISE*** (Reinventing Supply Chain Effectiveness).

Committed to furthering healthcare innovation



Anchor Partners

Innovation challenges
Thought leadership
20 seats accelerator
Mentorship

India - Sweden Innovation Centre

NASSCOM® Center of Excellence-IoT & AI



10+
solutions scaled

- IoT and AI based diagnostic solutions
- Disease education and support solutions
- AI-based digital healthcare management platform
- Personalized cancer care



10L+
Patients reached

1700+
Nurses Upskilling in NCD

AstraZeneca

Sustainability



Working with the Society (1/2)

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

Young Health program

~8500 women screened

~ 1.3 lac youth reached











Peer educator training at Yalahanka HIC



Peer Educators interaction was captured with Pediatrician (Dr. Subray) of Yelahanka general hospital.

Source:

26

Working with the Society (1/2)

Maintaining AZ Green Drive

5000 geo-tagged trees

Grant-A-Wish

Granting wishes to 550 children























AstraZeneca

Great Place to Work



Our GPTW Strategy aligned to People development has strengthened our Internal and External Employer Brand

INTERNAL PULSE SURVEY

85%

Employees believe AZ is a great place to work

85%

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

86%

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

89%

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

EXTERNAL RECOGNITIONS



Years in a row - Certified



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



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

Source :Pulse Survey Q2 2022, GPTW Certification, Working Mother and Avtar Best Companies for Women in India study

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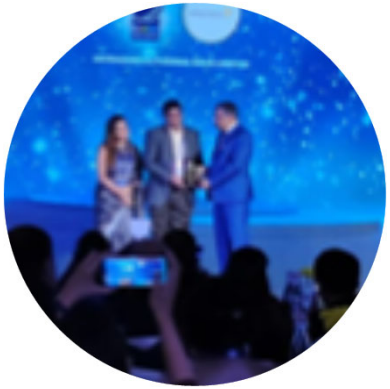
Winning accolades



Gold for YHP



Ganga Godavari Initiative



CKD Academy



i-PHARMACY



Gold for Project HeartBeat

Highlights of the year



AstraZeneca India Gets Approval To Market Anti-Diabetes Drug

AstraZeneca India expands 'Ganga Godavari Cancer Screening' initiative

India-Sweden Healthcare Innovation Centre Partners with the Directorate of Health Services Jammu To Tackle Cancer Burden

AstraZeneca India collaborates with 4baseCare to enhance access to genomic testing for cancer patients

AstraZeneca launches iPHARMACY to upskill pharmacists across India

Our collaborations with Govt of India focus on building resilient healthcare systems

Have firm plans to bring in drugs from global pipeline to tackle India's NCD challenges: Gagandeep Singh Bedi, AstraZeneca India

AstraZeneca India expands portfolio with rare disease therapy

Clinical advancement. AstraZeneca Pharma India receives DCGI's approval for import of cancer drug

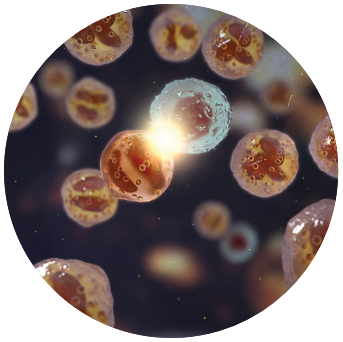
New products in oncology space will continue to be our growth drivers: Dr Anil Kukreja, AstraZeneca India

New products in oncology space will continue to be our growth drivers: Dr Anil Kukreja, AstraZeneca India

Our Focus



Growth Through Innovation strategy | Accelerating our Regulatory approvals



Expanding our pipeline across all our TA- Oncology and Biopharmaceutical to Rare Disease



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



We are accelerating our T&Dy agenda



Industry-leading initiatives to drive Ambition Zero Carbon

Ambition Zero Carbon

Accelerating the delivery of net-zero healthcare, proactively man aging our environmental impact and investing in nature and biodiversity.



Leadership change



Rajesh Marwaha
to retire in September



Bhavana Agarwal to assume role of
CFO AstraZeneca

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Thank you