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Novartis Oncology Pipeline – Molekular Zielgerichtete Therapieentwicklung“

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Novartis Oncology: A global leader in Oncology

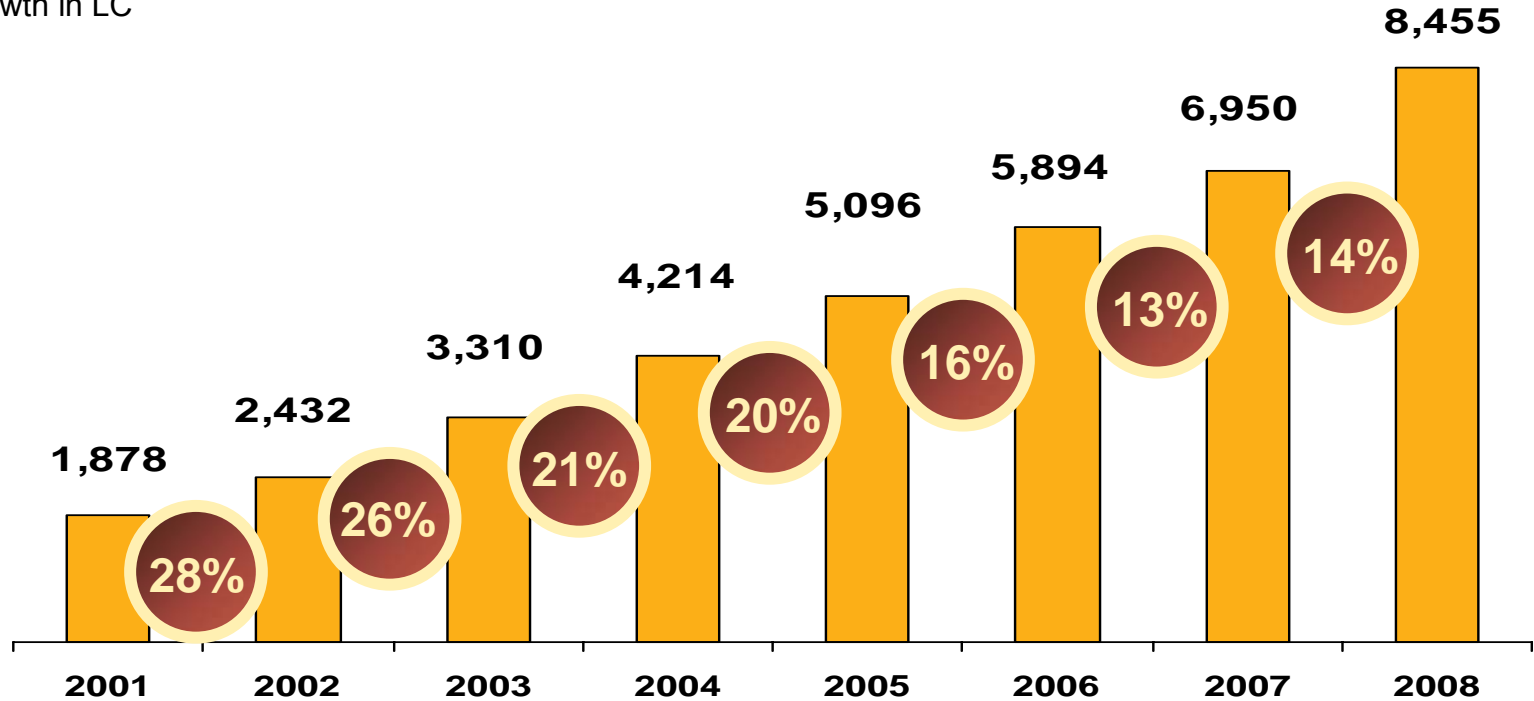
We discover, develop and commercialize products to protect and improve the health and well-being of patients with cancer



- Unique Business Unit model created in 2000 to focus on Oncology & Hematology
- Major sites in Florham Park (US), Basel (CH), Cambridge (US), Emeryville (US)
- Key growth driver for Novartis Pharma
- More than 5,200 employees worldwide

“Business Unit” Structure: The power and resources of big pharma with the passion and speed of biotech

In USD millions
Growth in LC

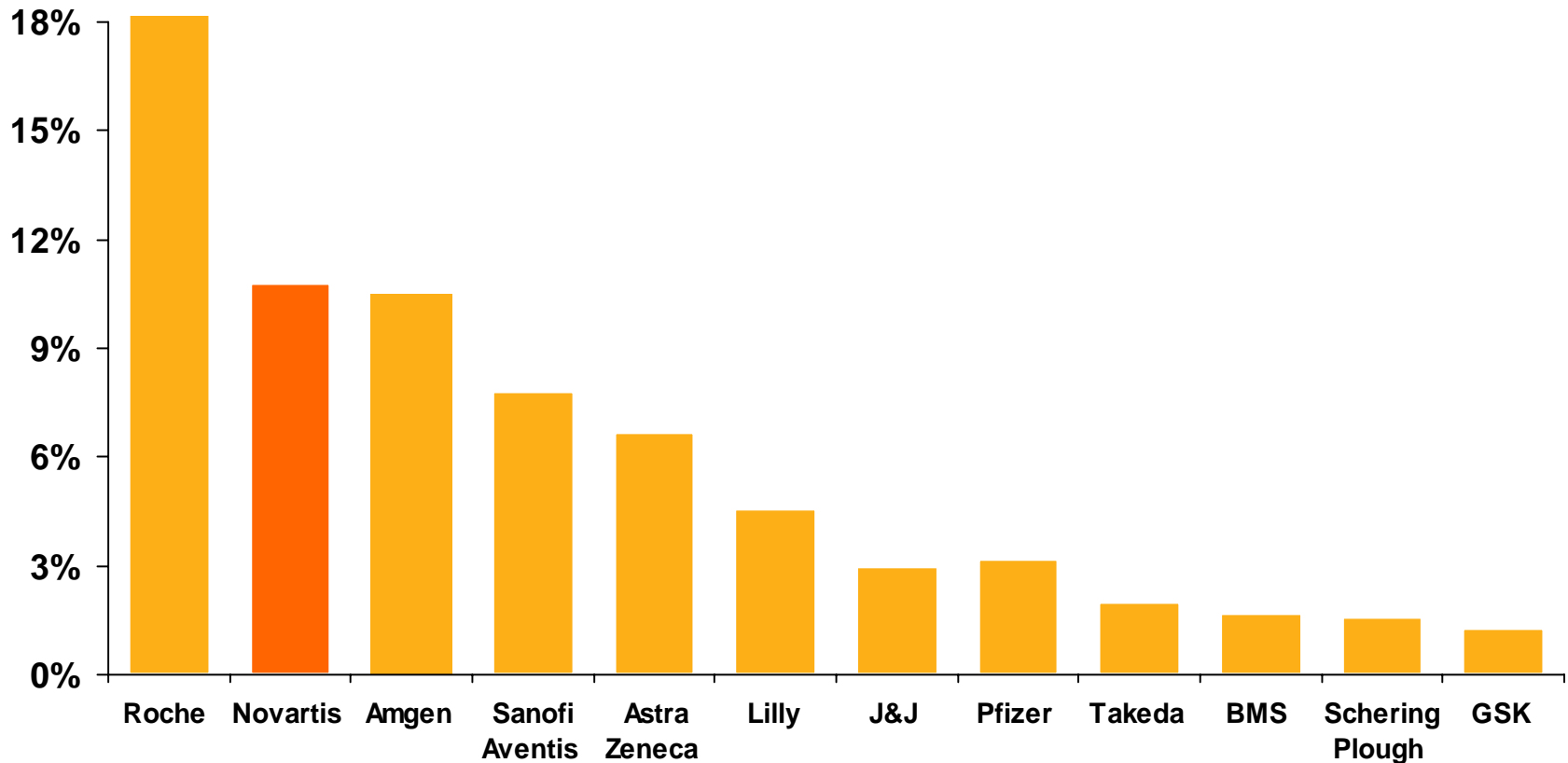


¹ Q4 2001 ² Q1 2009

Source: Novartis Oncology; IMS PADDS

Novartis Oncology is the world's second largest Oncology business

Global Oncology market segment share

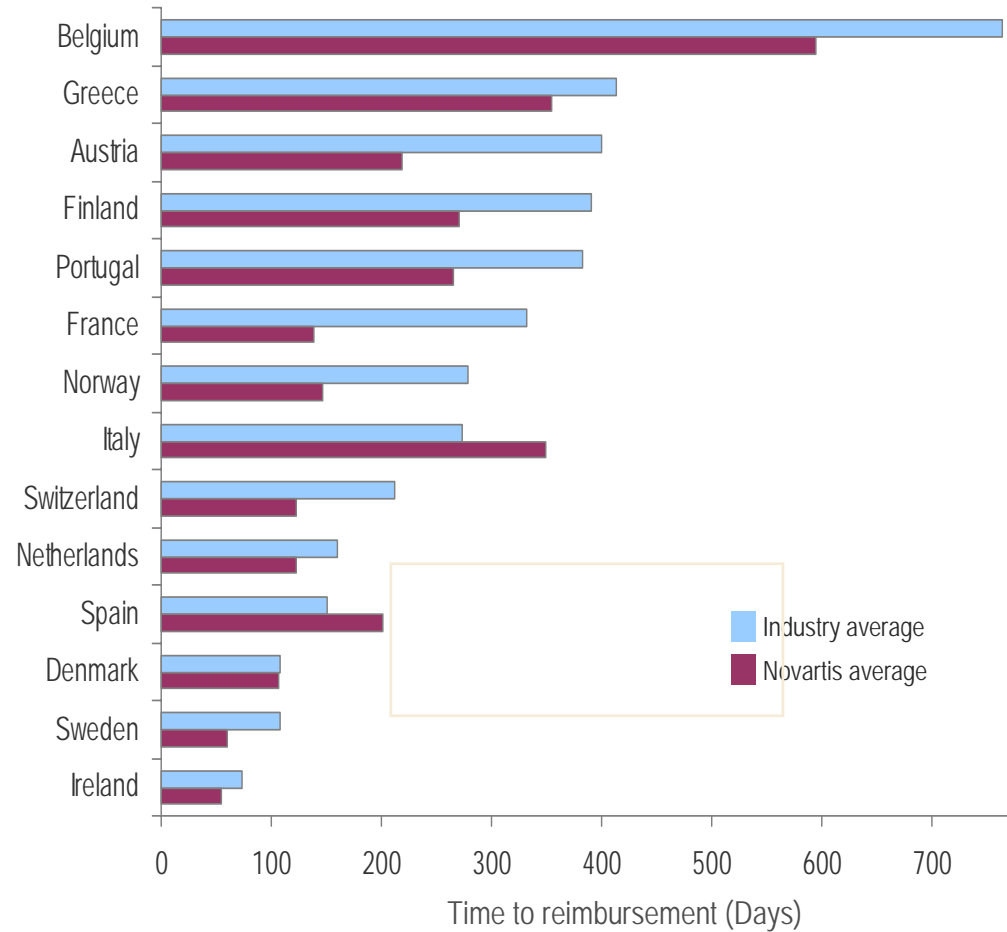


Worldwide Market Share as of MAT Q1 2009 based on IMS MIDAS Data

Source: IMS MIDAS

Novartis Succeeds in Accessing European Markets at a Faster Pace Than Industry Average

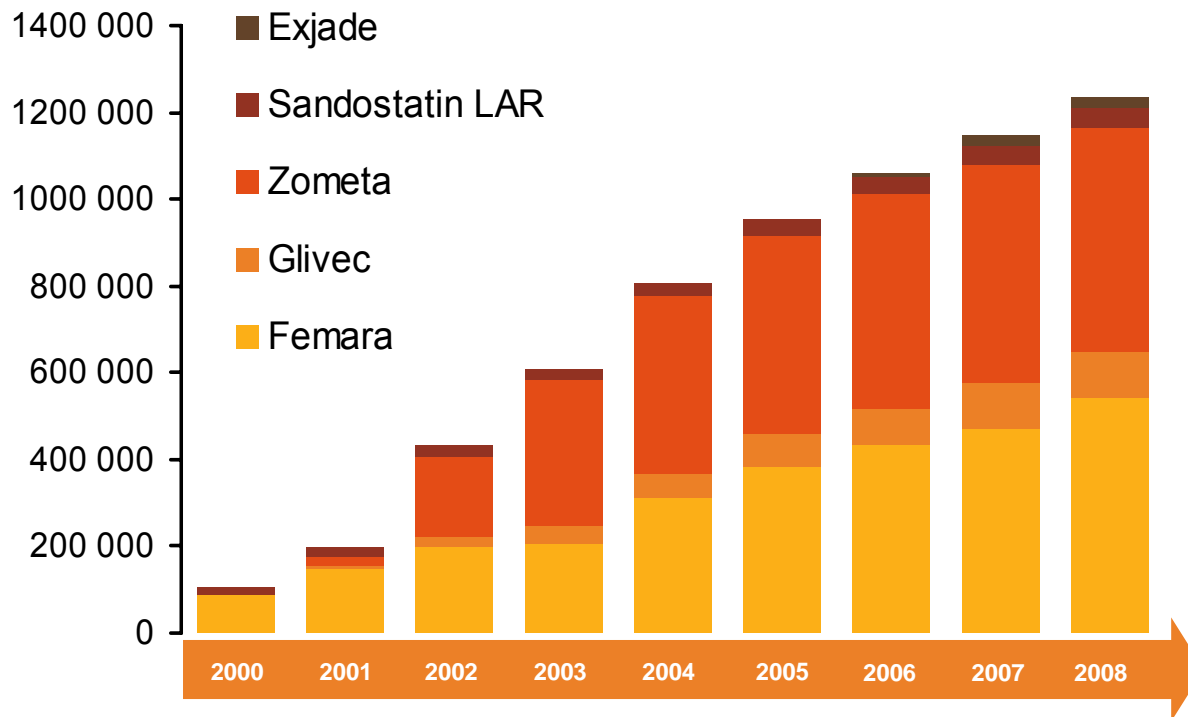
- There are significant delays in getting reimbursement approval in the EU
- Delays in reimbursement are costly to pharmaceutical companies
- Timely market access at optimal prices has become more challenging
- treatments for unmet needs no longer immune from access pressures
 - In the UK, Avastin and Erbitux rejected on cost-effectiveness grounds
 - In Italy, Sutent and Nexavar not reimbursed until patient shows response
- Companies challenged to be increasingly creative in demonstrating value



Source: Internal survey performed by IMS-Cambridge Pharma Consultancy

Over 1.2 million cancer patients were treated with Novartis Oncology drugs in 2008

Number of Treated Patients



Key oncology and hematology projects

Exploratory	Confirmatory		Registration
	Phase I/II	Phase III	
HCD122 Hem. tumors	LBH589 Hodgkin's lymphoma	ASA404 NSCLC ³	Afinitor® RCC ⁷
TKI258 Solid tumors	PKC412 ASM ¹	EPO906 Ovarian cancer	
RAF265 Solid tumors	EPO906 Solid tumors	SOM230 Cushing's disease	
BEZ235 Solid tumors	Exjade® Hered. hemochromatosis	PKC412 AML ⁴	
AUY922 Solid tumors	LBH589 Hemat. & solid tumors	Afinitor® pNET ² and Carcinoid	
BHQ880 Solid tumors	Afinitor® Solid tumors	Afinitor® TSC ⁵	
BGT226 Solid tumors		Afinitor® ER+ Breast Cancer	
BKM120 Solid tumors		SOM230 Acro and Carcinoid Syndrome	
LCL161 Solid tumors		Tasigna® GIST ⁸ / newly diagnosed CML ⁶	
LDE225 Solid tumors		Zometa® Adjuvant breast cancer	
HSP990 Solid tumors			

¹ Aggressive systemic mastocytosis

² Pancreatic neuroendocrine tumor

³ Non small cell lung cancer

⁴ Acute myeloid leukemia

⁵ Tuberous sclerosis complex

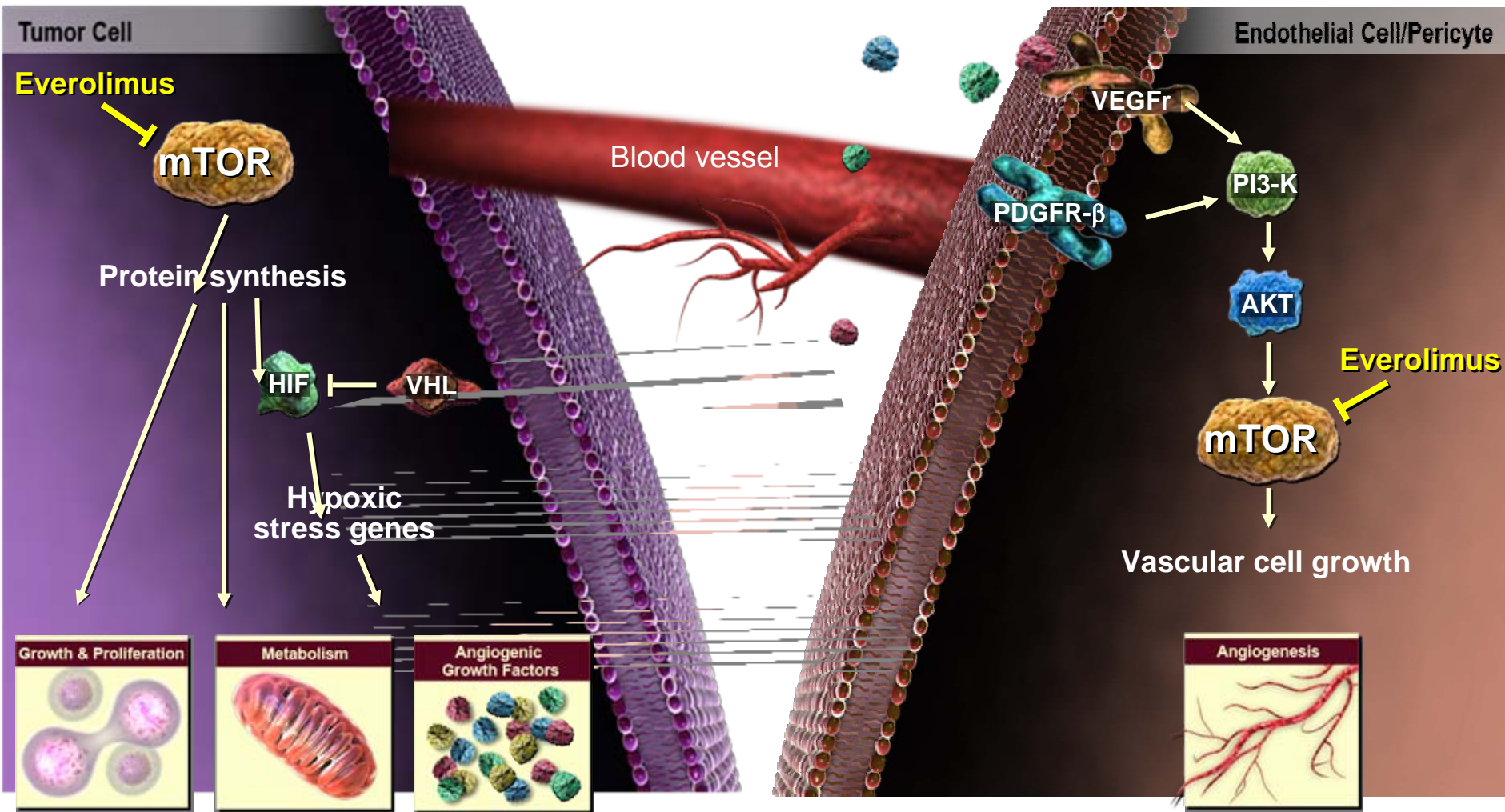
⁶ Chronic myeloid leukemia

⁷ Renal cell carcinoma

⁸ Gastrointestinal stromal tumor



Everolimus inhibits mTOR in tumour cells and endothelial cells



Broad Development Plan for Afinitor in 2009-2010

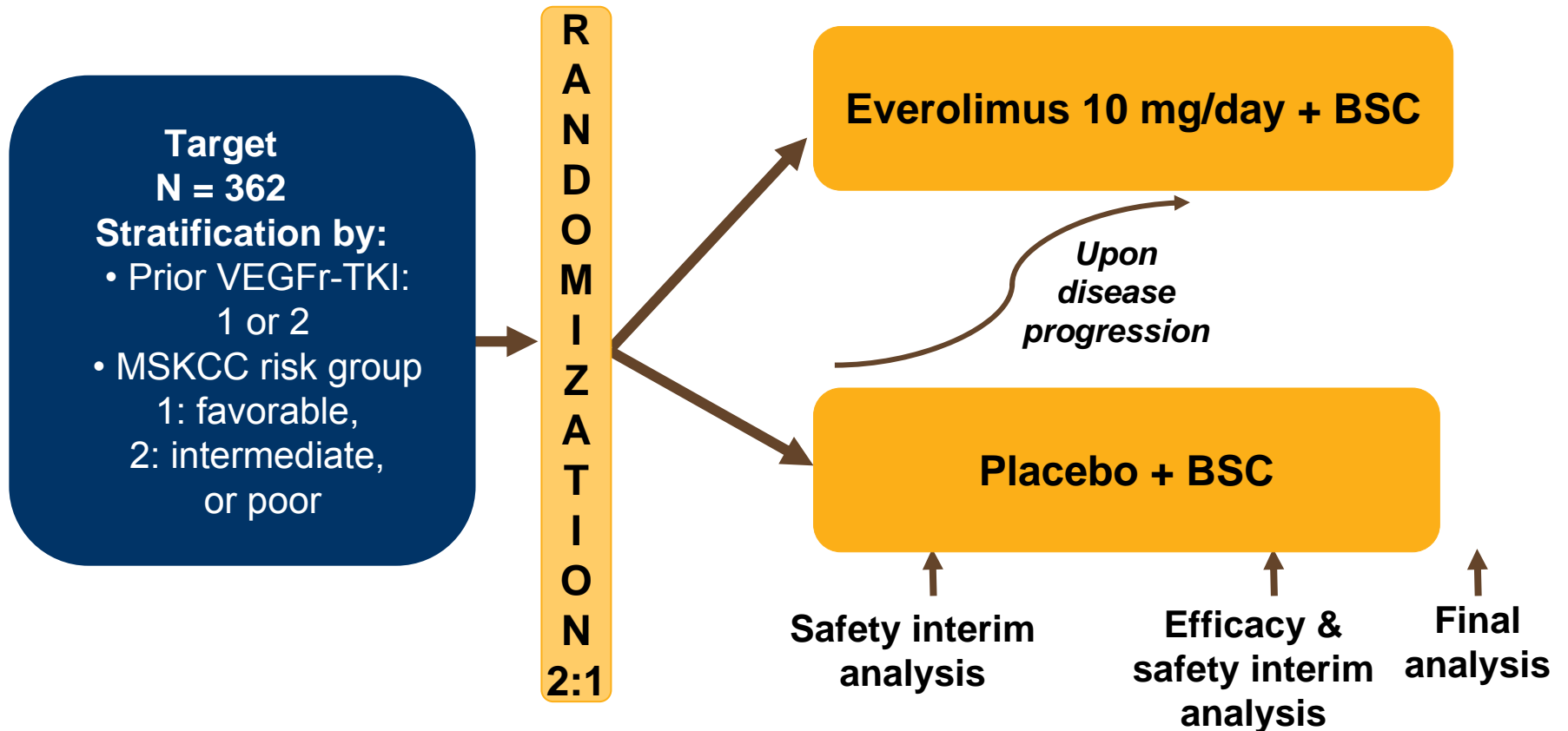
THE
WIDE¹
PROGRAM



Tumor	Ph	Status
RCC 2 nd /3 rd	Ph 3	Approved
Carcinoid	Ph 3	Enrolled
pICT 1 st line	Ph 3	Enrolled
TSC AML	Ph 3	Enrolling
TSC SEGA	Ph 3	Enrolling
Gastric 2 nd /3 rd	Ph 3	Enrolling
Breast ER+	Ph 3	Enrolling
HCC	Ph 3	2010
Breast HER2+ (1 st)	Ph 3	Enrolling
Breast HER2+ (2 nd /3 rd)	Ph 3	2009
DLBCL	Ph 3	Enrolling

¹ Worldwide Initiative to Develop Everolimus;

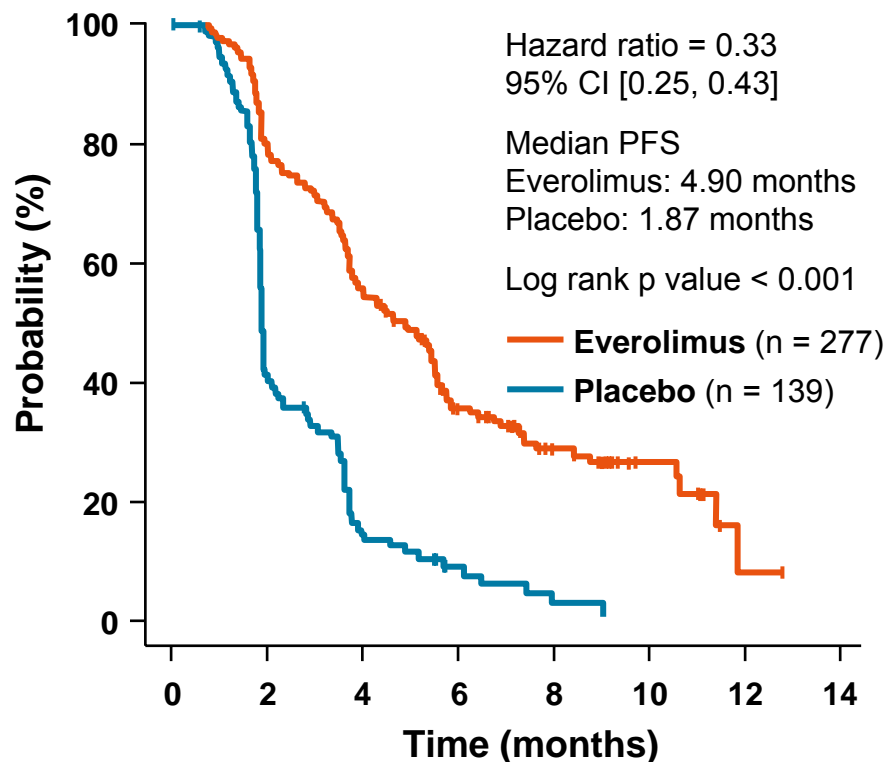
RECORD-1 – Afinitor in mRCC / Study design



Interim analyses planned after \approx 30% and 60% of targeted 290 events

PFS by treatment end of double-blind

Central radiology review¹

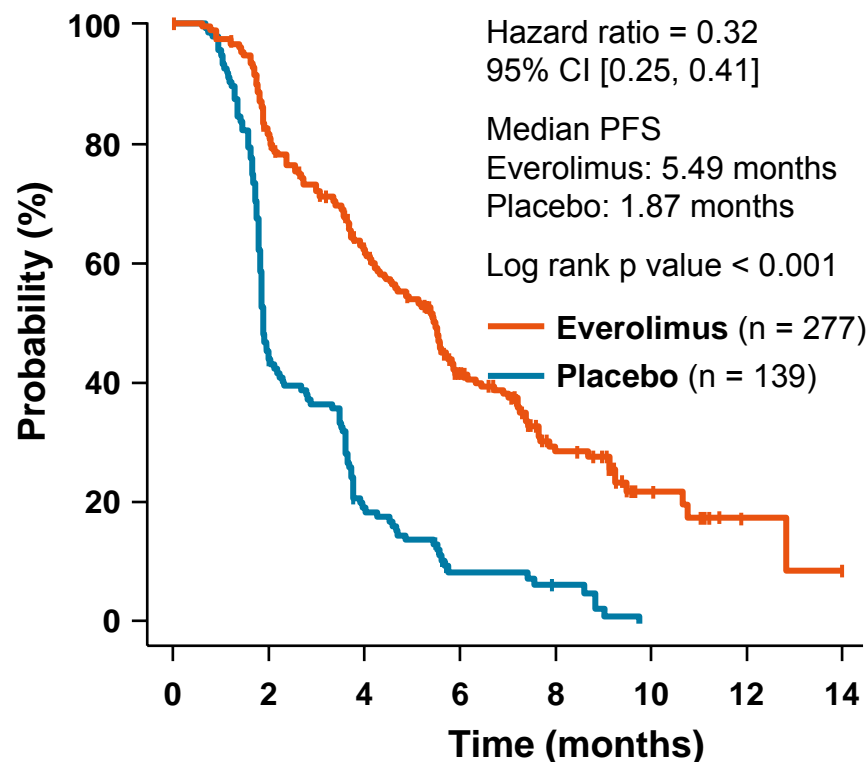


Number of patients at risk, n

Everolimus	277	192	115	51	26	10	1	0
Placebo	139	47	15	6	2	0	0	0

Analysis on Feb 2008 data cut-off.

Investigator assessment²



Number of patients at risk, n

Everolimus	277	210	149	76	33	11	2	0
Placebo	139	62	25	8	5	0	0	0

1. Escudier B, et al. Ann Oncol. 2008;19:viii45 [Abstract 720];
2. Kay A, et al. Presented at ASCO-GU 2009 [Abstract 278] by Motzer.

Novartis Oncology

A strong partner

Combines the power and resources of a big pharma with the passion and speed of a biotech

- A global leader in Oncology, with
- Proven commercial excellence

