

Elekta Capital Markets Day

29 October 2012, Boston



Note: This capital markets presentation is intended for investors and analysts only. Some products are still in research and/or not cleared/approved in all markets. Cancer statistics are given to show the potential market in the respective area and does not mean that Elekta currently have products to treat these indications.





ELEKTA

Growth through innovation

13:00	Innovation • Growth	Tomas Puusepp , President and CEO
13:20	Elekta Neuroscience	Åsa Hedin , Executive Vice President
13:40	Elekta Brachytherapy	John Lapré , Executive Vice President
14:00 Q&A and Coffee		
14:20	Elekta Oncology	Dee Mathieson , Senior Vice President
14:50	Elekta Software	Todd Powell , Executive Vice President
15:10	Region North America	Jay Hoey , Executive Vice President
15:30	Concluding remarks, Q&A	Tomas Puusepp , President and CEO

Growth through inn



*Human Care Makes
the Future Possible*

Elekta
Growth through innovation
ASTRO 2012

Tomas Puusepp
President and CEO



Elekta – pioneer of modern cancer care

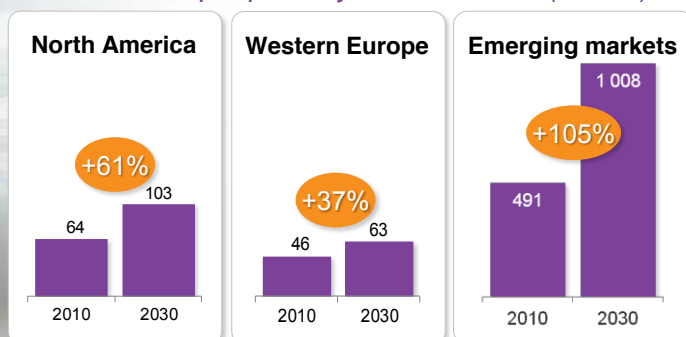


- One of the fastest growing companies in the industry
- Last year close to 1,000,000 patients benefited from treatment with radiation therapy equipment from Elekta
- Market leader in:
 - 3 out of 4 business areas
 - 2 out of 3 regions
- 8-9% of net sales is invested in R&D every year



Need for cancer care is growing

Number of people 60 years and older (million)

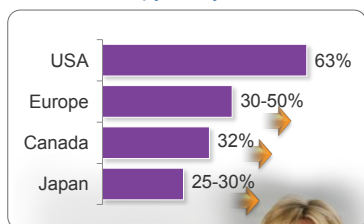


Source: WHO, August 2012 Cancer Research UK



>50% of cancer patients in established markets to receive radiation therapy

Share of cancer patients receiving radiation therapy today



From "palliative" to "curative" – radiotherapy is a major contributor to improved cancer care

- Technology advancements
 - Imaging
 - Precision
 - Motion management
 - Safety
- Cost effective compared with chemotherapy and surgery



Elekta is the pioneer of modern radiation therapy

SRS
Stereotactic
Radiosurgery

MOSAIQ® OIS
Workflow software
for cancer care

**MR-guided
radiation
therapy**

IGRT
Image guided
radiation therapy

**Digital linear
accelerators**
Integrated
solutions

Agility™
Technological shift
in collimation

Brachytherapy

Linac SRS

Radiation therapy in the future

Patient-centric and disease-specific cancer care solutions

Yesterday
Radiation therapy

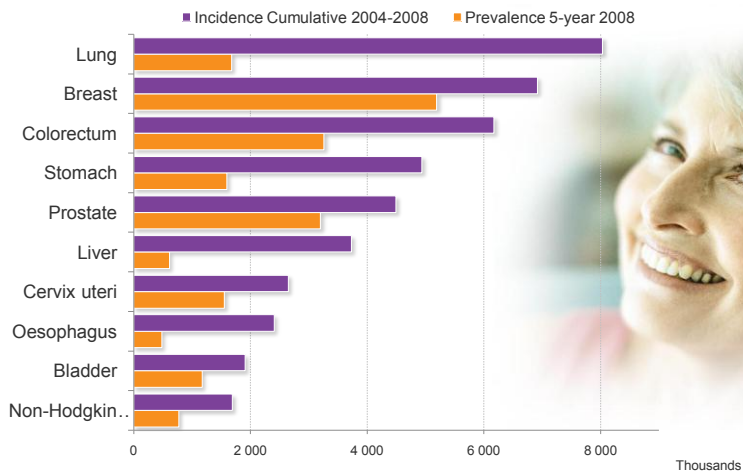
- Technology driven decisions
- System components in RT
- No access to referring physicians and patients
- Increasing level of competition from alternative treatments

➔

Tomorrow
Patient-centric cancer solutions

- Fully integrated solutions and multi-functionality
- Disease specific RT pathways and guidelines in support of effective care
- Cancer informatics and decision support systems for quality of care and care improvements

Improved prevalence - still low in some large indications



Source: IARC, WHO, Globacon 2008 database



Innovation through collaboration

Examples of R&D collaborations

- NEW** Elekta MR-guided linac consortium
- Elekta International IMRT consortium
- Elekta Synergy® Research Group
- Elekta Spine consortium
- Leksell Gamma Knife® Society
- Elekta Lung Research Group
- Elekta Clarity® consortium



Agility™* - modern cancer care without compromise

- Superior beam shaping to match the tumor
- Minimal exposure to healthy tissue
- Significantly faster



*Not for sale or distribution in all markets depending on status of approval and clearances.



Elekta's aspiration - double number of patients treated



Today: close to
1 million
patients

Aspiration
2 million
patients



Elekta has strengthened its position in radiation therapy

		Trend
Varian	48%	
Elekta	39%	
Accuray	8%	
Siemens	5%	
Others	*-	



*Note: Order intake. Sources – company reports
* Accurate data missing*



Regional outlook

North and South America

- Stable demand in North America
- Strong growth prospects in South America

Europe, Middle East and Africa

- Stable growth in both Central and Nordic regions
- Slower development in southern Europe
- Good demand in emerging markets

Asia Pacific

- Strong market growth, driven by large unmet needs and government initiatives



Outlook for fiscal year 2012/13

- Net sales is expected to grow by more than 15% in local currency, including Nucletron
 - Organic growth >10%
- Operating profit in SEK is expected to grow by more than 15%, including Nucletron
- Currency is estimated to have a neutral effect, including hedges



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*Human Care Makes
the Future Possible*





*Human Care Makes
the Future Possible*


Leading Clinical Innovation

Åsa Hedin
Executive Vice President
Elekta Neuroscience



Elekta Neuroscience – pioneer in SRS

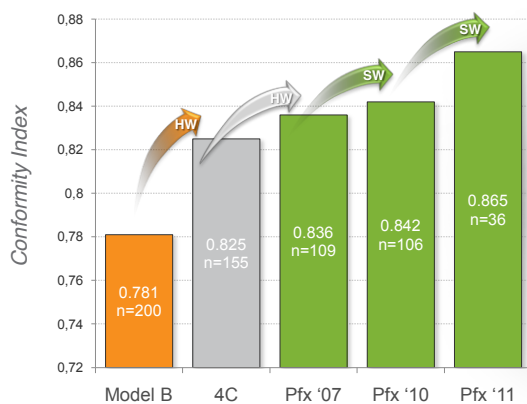
World-leading solutions for
treatment and localization
of brain disorders



Elekta Gamma Knife[®] PERFEXION[™]



Innovation drives clinical excellence

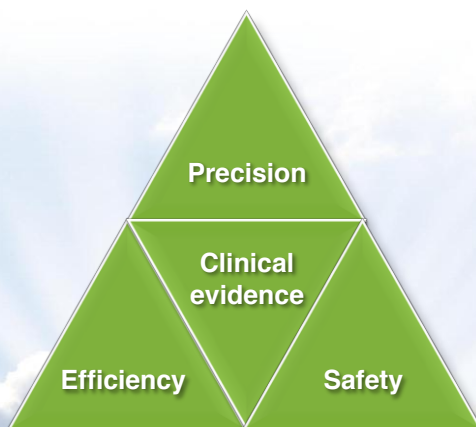


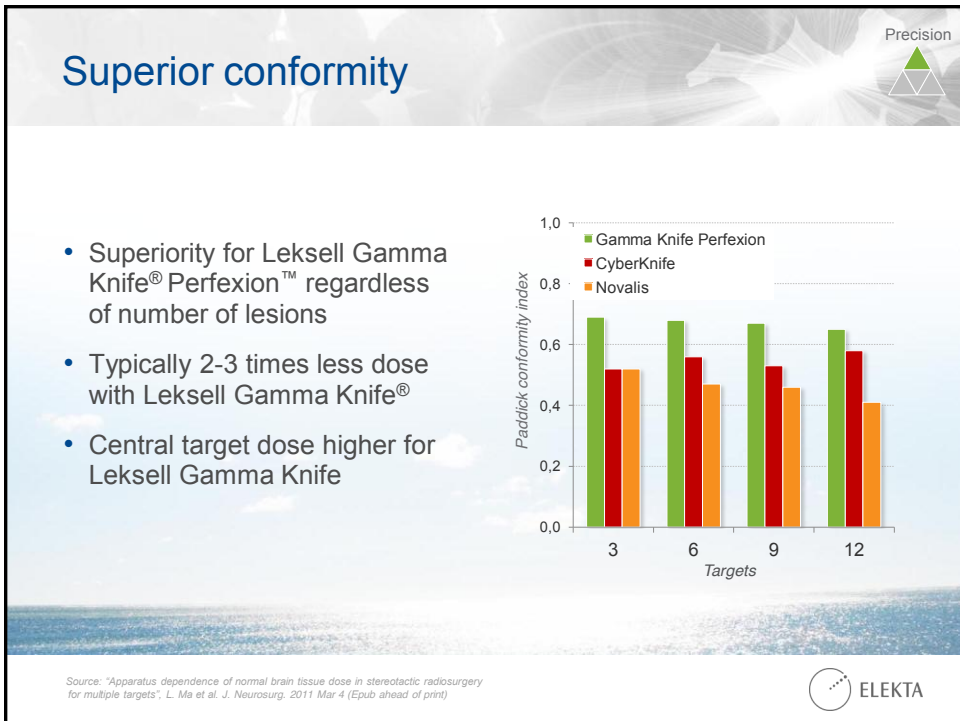
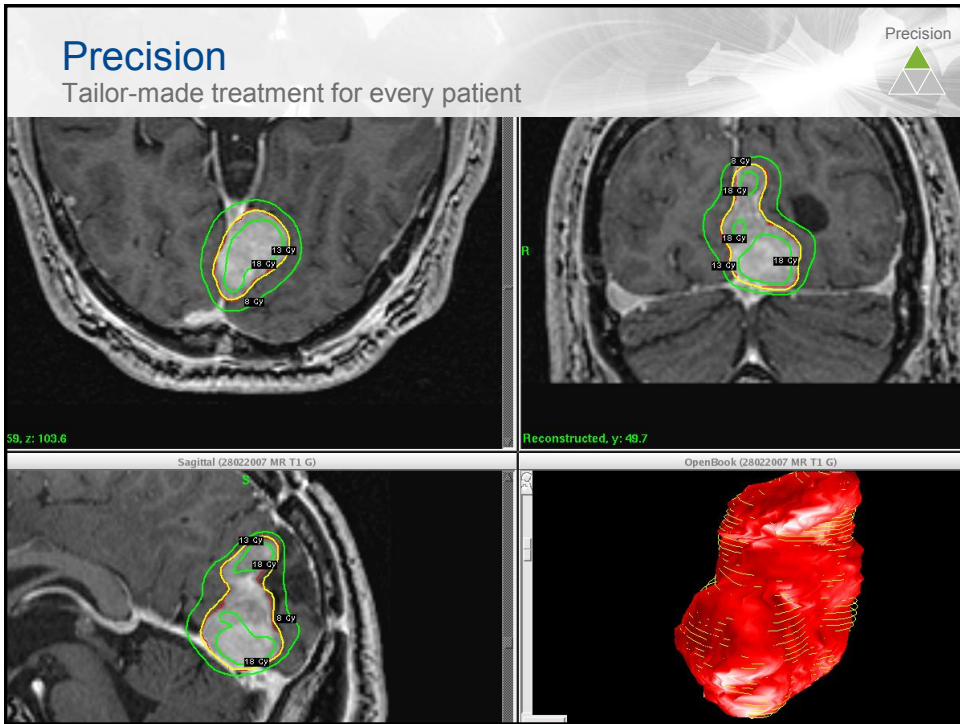
Treatment time 100% 103% 89% 73% 59%

Data courtesy of Ian Paddick

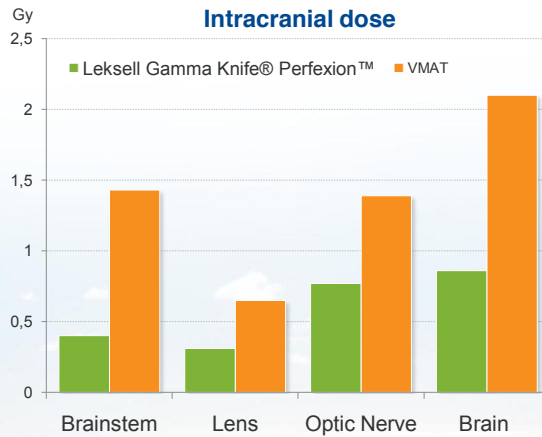


Leksell Gamma Knife® Precision, Safety and Efficiency





Safety is to minimize dose deposited to tissues outside the radiation target



Source: Elekta Internal investigation Right picture "The Leksell Gamma Knife® Perfexion™ and comparisons with its predecessors", C. Lindquist and I. Paddick, Neurosurgery 61: ONS 130 141 2007



Effective quality assurance



Leksell Gamma Knife®

- Daily QA 10 min
- Treatment Plan QA 5 min

Typical linac SRS

- Daily QA 30-45 min
- Winston Lutz QA 45 min
- Imaging QA 5 min
- IMRT Phantom QA – map check 30 min



15
minutes



110-125
minutes

Source: South Nassau Hospital, New York



Gamma Knife® surgery saves cost

Efficiency



Required staff for
40 operated
patients per month:

24



- 1 neurosurgeon
- 1 assistant neurosurgeon
- 1 anaesthesiologist
- 1 anesthesiology nurse
- 2 ICU anesthesiologist
- 1 night shift anesthesiologist
- 4 ICU nurses (2 shifts)
- 1 doctor ward
- 7 nurses ward (2shifts)
- 4 assistant nurses ward (2 shifts)
- 1 nurse night shift

Required staff for
40 Gamma Knife®
patients per month:

5

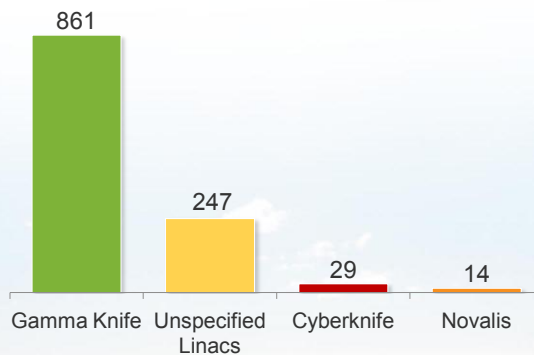


- 1 neurosurgeon
- 1 radiation oncologist
- 1 physicist
- 2 nurses



Overwhelming clinical evidence

Peer-reviewed papers reporting more than 30 patients treated with SRS



Source: Elekta Database with information from PubMed as per 25 September 2012
 *Includes AVMs, Meningiomas, Metastatic Tumors, Pituitary Tumors, Trigeminal Neuralgia, Vestibular Schwannoma papers
 Note: Papers for CyberKnife include some SRT patients.



Strong growth of brain metastases

- Brain metastases occur in 20-40%
 - Majority of patients present with multiple metastases (50-63%)
- Reasons for increase in brain metastases incidence:
 - Improved survival in patients with cancer due to better diagnosis and management of the primary cancer
 - Increased availability of advanced imaging techniques for early detection
 - Vigilant surveillance protocols for monitoring recurrence
- Untreated patients have a very short expected survival



Accelerated paradigm shift in treatment of brain metastases

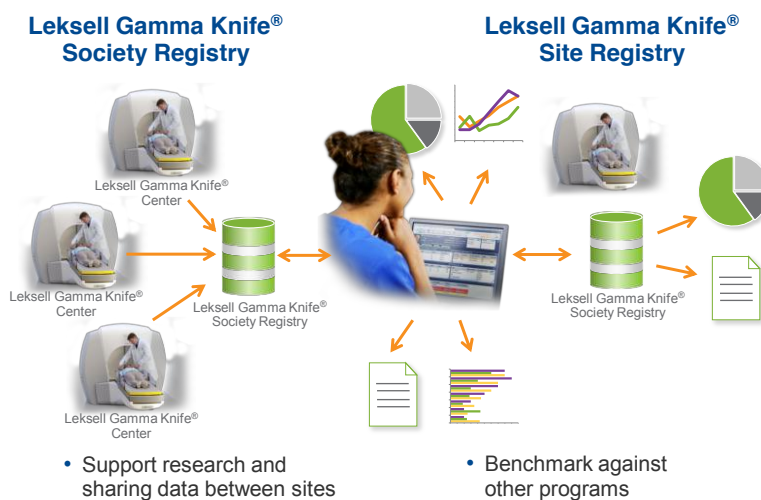
- Radiosurgery provides excellent clinical outcome
- Significant gains in quality of life
- Specific clinical features
- Cost effective



Continuous innovation to improve cancer care

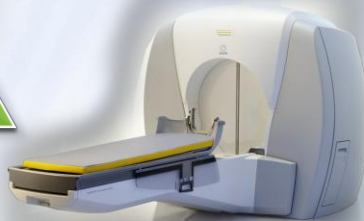


Further improving clinical data management



Leksell Gamma Knife®

Uniquely positioned for the future of SRS

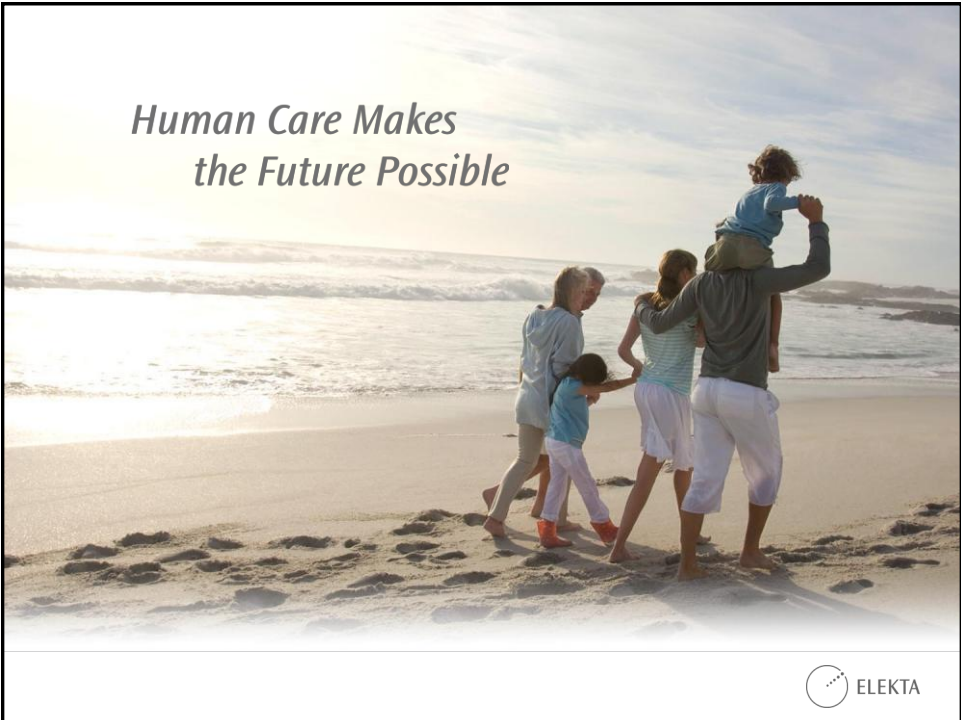


Meeting the patient's needs

- Focus on growth segments (metastases) and invest in markets with low penetration
- Continue upgrading and expanding installed base
- Work even closer with patient organizations and end users
- Clinical evidence and findings of Leksell Gamma Knife® superiority
- All patients should have access to Leksell Gamma Knife®



*Human Care Makes
the Future Possible*



*Human Care Makes
the Future Possible*

Elekta Brachytherapy

John Lapre
EVP Elekta Brachytherapy
President Nucletron

World leader in brachytherapy

- Unmatched global leadership in brachytherapy
 - Presence in >100 countries
 - 3,000 clinics worldwide using Elekta brachytherapy products
 - 60% worldwide market share (HDR)
- Strong R&D focus ~11% of revenues invested in fiscal 2011/12
- Brachytherapy to grow with >10%

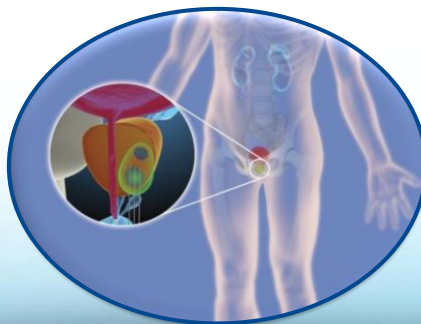


 **Nucletron**
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Brachytherapy

Highly precise, patient-centered treatment for targeting cancer

Brachytherapy works “from the inside, out”




Source: Stewart AJ & Jones B. In Devlin Brachytherapy: Applications and techniques, 2007.

 **Nucletron**
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Brachytherapy Responding to physician and patient needs

Clinician


- Flexible: used in combination with EBRT, surgery, or alone
- Efficacious, precision targeting
- Prevents unnecessary damage to healthy tissues
- Favorable safety profile, minimal side-effects
- Often out-patient



Patient


- Short, effective treatment course
- Accessibility to, and compliance with, treatment
- Favorable safety profile, with minimal side-effects
- Minimal interference with everyday life and QoL
- A safe, effective modality, tailored to patients' clinical needs

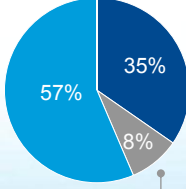
Efficient and cost-effective



Leading product portfolio with high share of services

Service & software







Category	Share
Service & software	57%
Hardware	35%
Imaging and other	8%

Hardware


Afterloaders



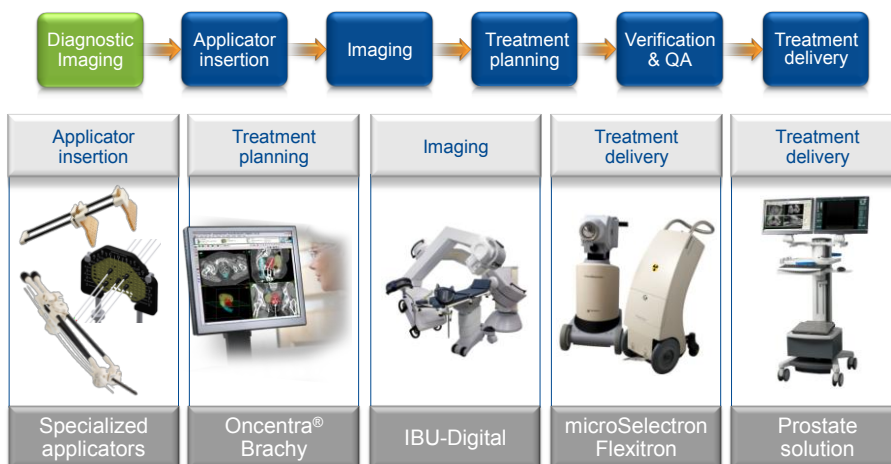
Applicators



Imaging and other



The brachytherapy solution



 **Nucletron**
AN ELEKTA COMPANY

Nucletron is integrated in Elekta

- Efficient and fast integration: from October 2011 to April 2012
- Sales offices integrated
- Elekta sales force trained on brachytherapy solutions
- Nucletron has found a home for life in Elekta
- Excellent cultural fit



 **Nucletron**
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Nucletron within the Elekta group

Continued focus on four growth drivers



Driving awareness of brachytherapy



Expanding geographically



Developing new body sites



Growing the installed base



Growing the installed base

Cross-selling opportunities

No. of customers:



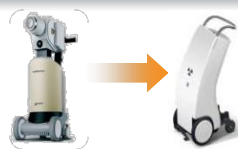
5,000



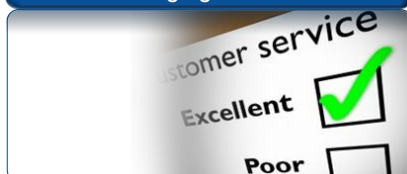
3,000

→ ~1,000 unique customers

Afterloader upgrade



Growth of services, especially in emerging markets



Disposable applicators and additional software modules



Cross-selling customer cases in emerging markets



Venezuela:
Maturin
Linac + Afterloader



Thailand:
Bumrungrad International
Elekta Synergy® +
MOSAIQ® + CMS
+ Oncentra® Prostate +
Evolution Simulator



China:
**Affiliated Yong Chuan
Hospital of Chongqing
Medical University**
Elekta Synergy + SIM EVO +
Oncentra



Indonesia:
Murni Teguh
Linac+ Afterloader + Oncentra



India:
Hariom
Elekta Synergy + Afterloader +
Oncentra

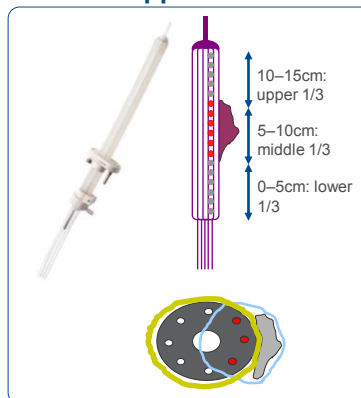


Rectal cancer is one of the most rapidly growing indications

Market opportunity:

- Colorectal cancer incidence: 3rd most frequent cancer in the EU and US⁽¹⁾
- Expected to grow rapidly
- Canadian (McGill) Phase II study: Beneficial effects of brachytherapy as alternative to chemoradiation⁽²⁾
- Nucletron supports clinical evidence generation and guideline reviews

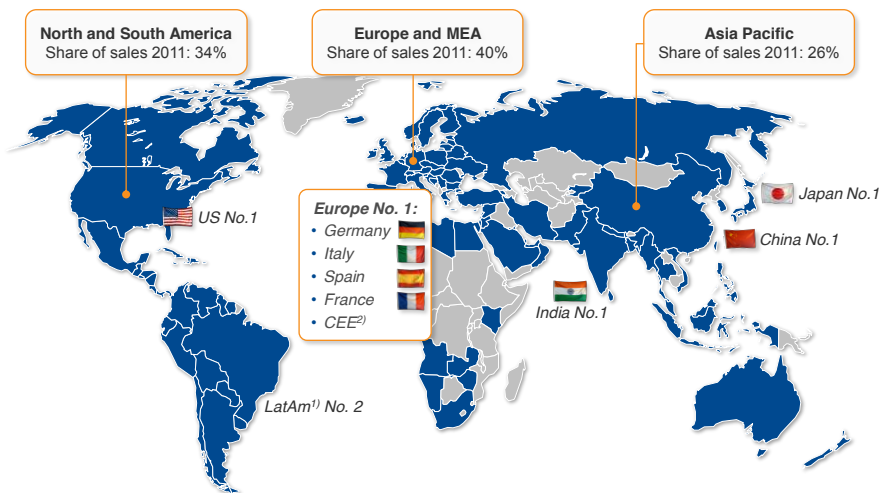
Nucletron's disposable rectal applicator



(1) WHO Globocan 2008.
(2) Vuong T et al Curr Colorectal Cancer Rep (2010) 6:228-234.



Truly global business and No.1 in the world

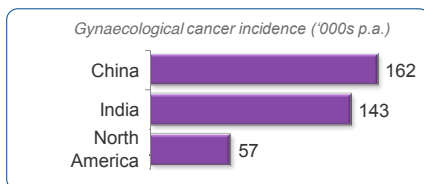


Source: Company information (2011 estimates as at March 2012).
(1) Includes Argentina, Brazil, Chile, Colombia, Costa Rica, Ecuador, El Salvador, Guatemala, Honduras, Mexico, Nicaragua, Panama, Peru, Venezuela, Bahamas, Barbados, Puerto Rico and Trinidad and Tobago.
(2) Includes Belarus, Bulgaria, Poland, Russia, Serbia, Slovak Republic, Turkey, Armenia, Bosnia & Herzegovina, Hungary, Lithuania, Romania and Ukraine.



Expanding geographically

Developing markets have the highest levels of cancer incidence suited for brachytherapy...



...and large potential to grow the installed base

North America

Installed base: 1,034
No. of persons/afterloader: 330,000

Western Europe

Installed base: 710
No. of persons/afterloader: 580,000

Emerging markets

India: >6,200,000 persons/afterloader
China: >6,800,000 persons/afterloader



Driving awareness of brachytherapy

Evidence

- EMBRACE a study in MRI guided brachytherapy in locally advanced cervical cancer

Adoption

- Intense customer training program and workshops

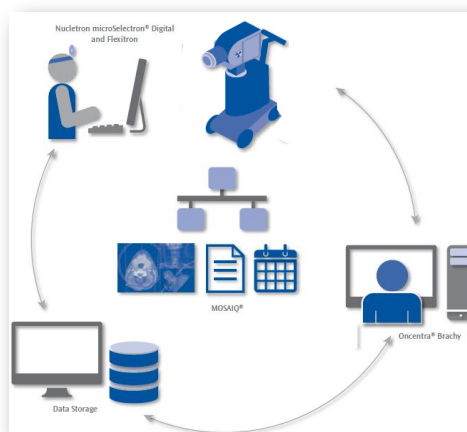
Infrastructure

- Health technology assessments (reimbursement)



New 1 MOSAIQ® Connectivity

- Brachytherapy planning and delivery part of the general RT workflow
 - Ensures a better paperless flow of patient information
 - Automatically performs dose tracking (only with MOSAIQ®)
 - Improves the quality of the treatment chart
 - Streamlines the billing process for brachytherapy procedures



New 2

Oncentra® Brachy 4.3

- Access to powerful 3D planning
- Accuracy in treatment planning
- Increasing workflow efficiency

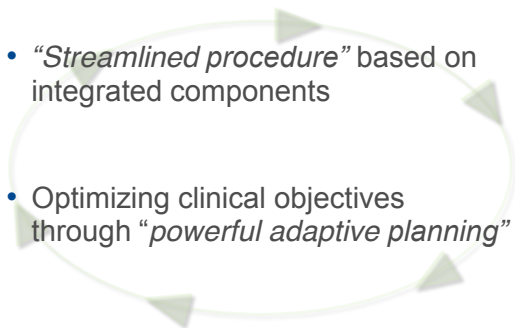


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New 3

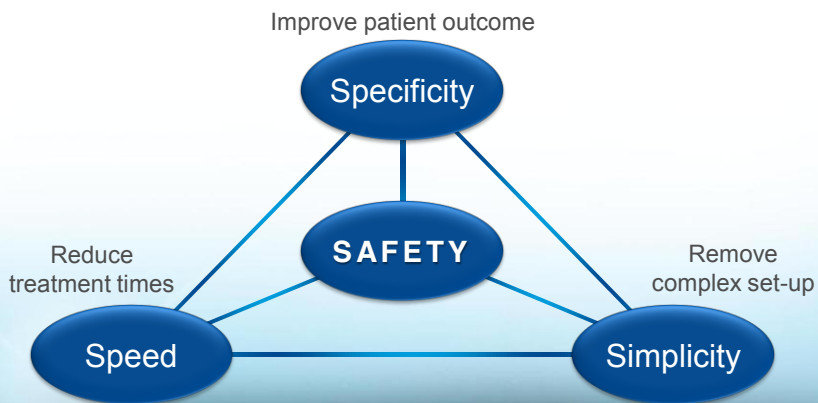
Repositioned Nucletron prostate solutions

- Optimal accuracy and precision through “*genuine real-time workflow*”
- “*Streamlined procedure*” based on integrated components
- Optimizing clinical objectives through “*powerful adaptive planning*”



 Nucletron
AN ELEKTA COMPANY

Innovation in brachytherapy: 4S model

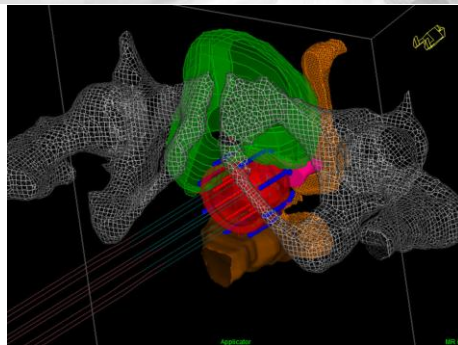


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Example: Vaginal CT/MR Multi Channel Applicator



- Specificity
- Speed
- Simplicity
- Safety



 Nucletron
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Good prospects for further growth

- Large untapped market potential
- Highly complementary treatment modality serving many of the same customers as Elekta
- Combined customer base of more than 6,000
- 4S innovation model
- Brachytherapy to grow with >10%



 **Nucletron**
AN ELEKTA COMPANY

*Human Care Makes
the Future Possible*



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Growth through innovation

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Growth through inn



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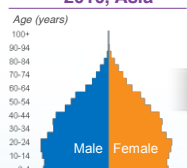
Elekta Oncology Advancing Clinical Practice

Dee Mathieson
Senior Vice President
Oncology Business Line Management



Cancer is growing worldwide

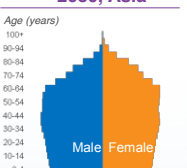
2010, Asia



Age (years)
100+
90-94
80-84
70-74
60-64
50-54
40-44
30-34
20-24
10-14
0-4

Male Female

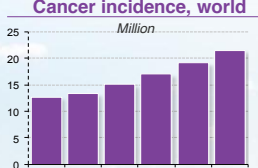
2030, Asia



Age (years)
100+
90-94
80-84
70-74
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20-24
10-14
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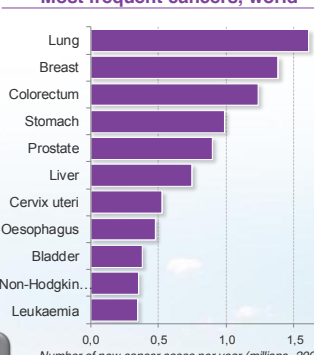
Male Female

Cancer incidence, world



Year	Incidence (Million)
2008	~12
2010	~13
2015E	~15
2020E	~17
2025E	~19
2030E	~21


Most frequent cancers, world



Cancer Type	Number of new cancer cases per year (millions, 2008)
Lung	~1.5
Breast	~1.3
Colorectum	~1.1
Stomach	~0.9
Prostate	~0.8
Liver	~0.6
Cervix uteri	~0.5
Oesophagus	~0.4
Bladder	~0.3
Non-Hodgkin...	~0.3
Leukaemia	~0.2

- Improved treatments – cancer becomes more of a chronic disease
- Re-treatments

Source: Globocan 2008

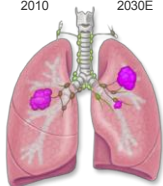
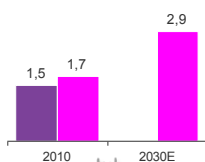


The challenge

■ Mortality ■ Incidence

Lung cancer

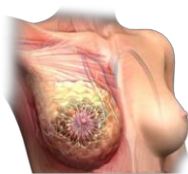
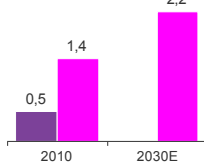
Global incidence, millions



- Constantly moving
- Decrease high mortality

Breast cancer

Global incidence, millions



- Minimizing impact on surrounding tissue
- Motion management

Prostate cancer

Global incidence, millions



- Motion management
- Accuracy and dose control

Source: GLOBOCAN 2008



Elekta delivery system

The most clinically focused offering on the market

Outstanding
beam shaping
Agility™

Digital control
7th
Generation



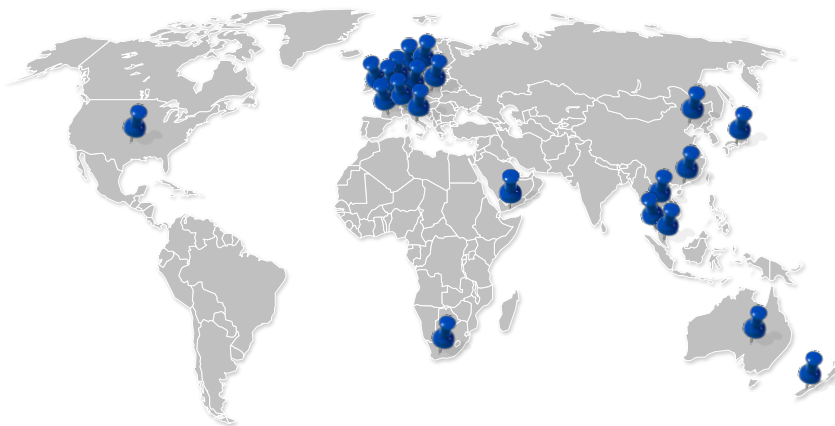
Agility™

Setting a new standard of care

- 2x number of leaves
 - Outstanding resolution to precisely match the contours of the tumor
- 2x speed
 - Unparalleled efficiencies
 - Essential for latest treatment techniques
- Less than 0.5% transmission
 - Minimal exposure to healthy surrounding tissue
 - Fewer side-effects
- Approved in Elekta's largest markets
 - USA, Japan, Europe




Agility – now shipped to 21 countries



Elekta delivery system

The most clinically focused offering on the market



Modular platform
Conventional - VMAT - SRT

Outstanding beam shaping
Agility™

Digital control
7th Generation

Energy efficient
30% less consumption solar power

Advanced image guidance
2D, 3D & 4D

High precision
Stereotaxy


Motion management
Tracking, gating, image guided

Widest clearance
Un-impeded clinical set-up

ELEKTA

Innovation through collaboration

Translating clinical research into patient benefits



Elekta International IMRT consortium

Elekta Synergy® Research Group

Elekta Spine consortium

Leksell Gamma Knife® Society

Elekta Lung Research Group

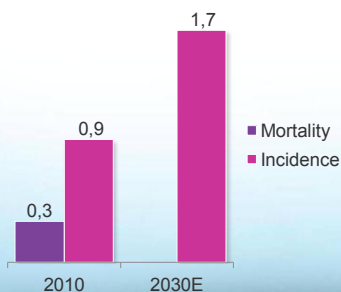
Elekta Clarity consortium

ELEKTA

Prostate cancer – most frequent male cancer

Incidence and mortality

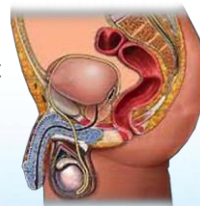
world, million



Challenge

Motion management

Accuracy and dose control

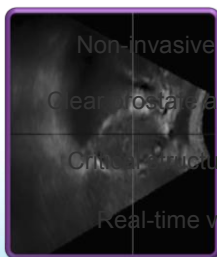


Source: Globocan 2008



Prostate – Motion management

Clarity® with Autoscan – Confidence during treatment



Non-invasive, non-ionizing
Clear prostate anatomy imaging
Critical structure information
Real-time visualization

Clarity®



Implanted markers

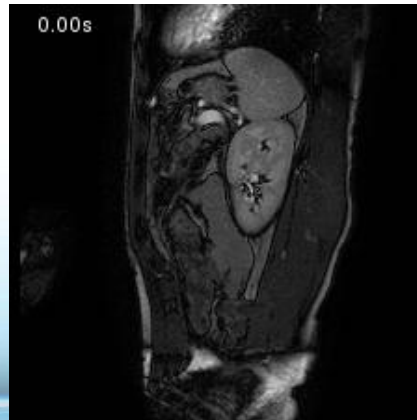


Pioneering the next major breakthrough...

State of the art MR imaging state of the art radiation therapy

- Building on a decade of research from UMC, Utrecht, NL
 - In collaboration with Elekta and Philips
- Research demonstrated unparalleled soft tissue visualization during irradiation
- Research collaboration with leading institutions

PHILIPS



Innovation through collaboration

Translating clinical research into patient benefits

NEW

Elekta MR-guided linac consortium

Elekta International IMRT consortium

Elekta Synergy® Research Group

Elekta Spine consortium

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Elekta Lung Research Group

Elekta Clarity consortium



Strong growth within oncology

- Significant increase in underlying demand
- Best cancer care solutions on the market
- New technology drives increased usage
- Comprehensive R&D project pipeline



Oncology will be a significant contributor to reaching 2 million patients treated

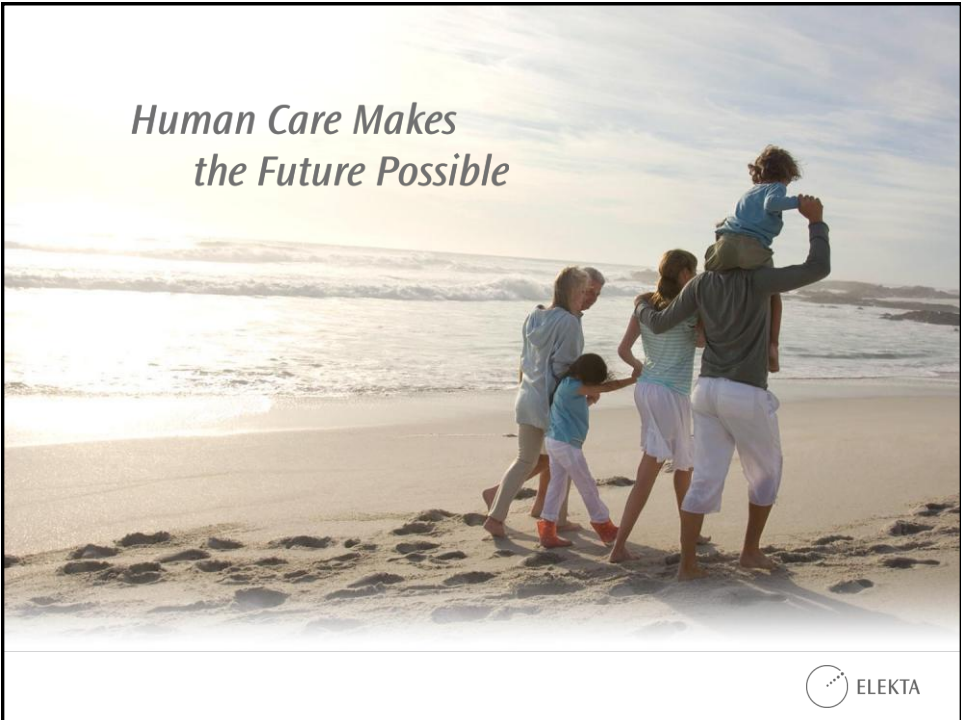


Integrated workflows through MOSAIQ®

- Managed and supported by MOSAIQ®
- Incorporates continuous quality improvement and decision support
- Delivers “evidence-based medicine”



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the Future Possible*



*Human Care Makes
the Future Possible*

Elekta Software

Todd Powell
Executive Vice President

World leader in cancer care software solutions

15,000 users are supported by over 400 dedicated experts driving best in class development

Over 1,000 parameters are managed during a typical treatment



Growth drivers for software

- Continue to grow installed base with market leading OIS system MOSAIQ®
- Strengthen market share within Treatment Planning System (TPS)
- Increased pace in innovation for continuous upgrades to drive growth within existing installed base

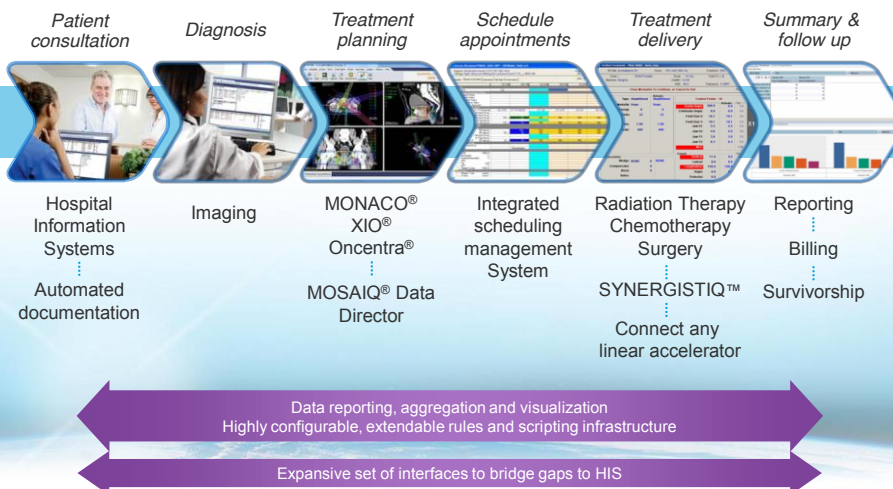


MOSAIQ® – best OIS software on the market

- Empower hospitals and clinics to digitally manage and streamline all aspects of cancer care
- Drive development towards disease-specific needs while enhancing tools to support standardization and clinical evidence
- Facilitate and record activities that are critical for evidence-based healthcare, patient safety and clinical workflow
- Open systems commitment



MOSAIQ® supports the entire chain of cancer care



True open systems commitment



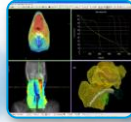
Treatment delivery

Elekta
Varian
Siemens
Accuray
Mitsubishi
Brainlab
Xstrahl



Beam shaping

Elekta
Varian
Siemens
Brainlab



Treatment planning

Elekta
Varian
Siemens
Phillips



Imaging

Elekta
Varian
Siemens
Any DICOM compliant device



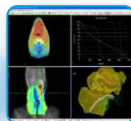
SRS and Brachy

Elekta
Varian
Accuray

79



True open systems commitment



OIS

Elekta
Varian
Siemens



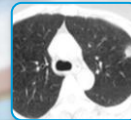
HIS

EPIC
Cerner
McKesson
GE Healthcare
Meditech
Any HIS system



Interfaces

HL7
IHE-RO
ESI



PACS

Elekta
Varian
McKesson
GE Healthcare
Cerner
Any DICOM compliant device or software

80



One platform – multiple locations

MOSAIQ®



100 sites

Clusters of 4 to 5 sites each
Transitioning to a cloud-based approach

9 sites

One MOSAIQ database

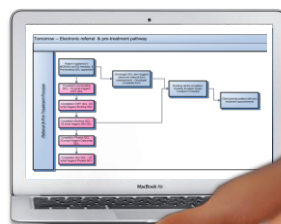
4 sites

One MOSAIQ database

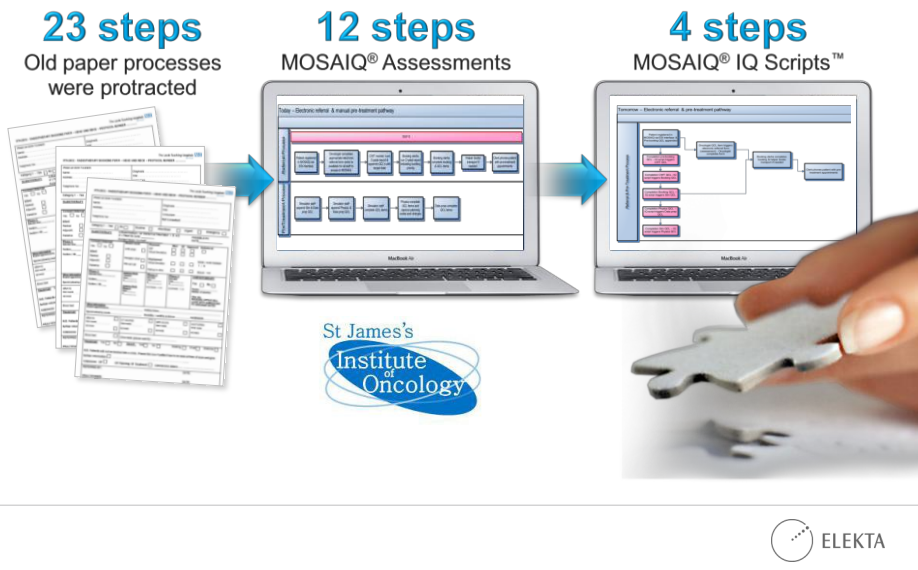


MOSAIQ®

IQ Scripts™



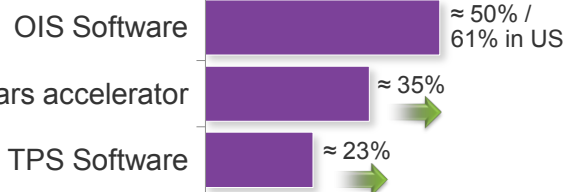
Customizing and automating patient workflow MOSAIQ® IQ Scripts™



MOSAIQ® enables full product integration



Leveraging on the strong market positions



Source: Elekta



MOSAIQ® RTP – integrated treatment planning



- Oncentra®
- Monaco®
- XiO®
- Conventional RT & particle support
- Powerful integrated imaging tools



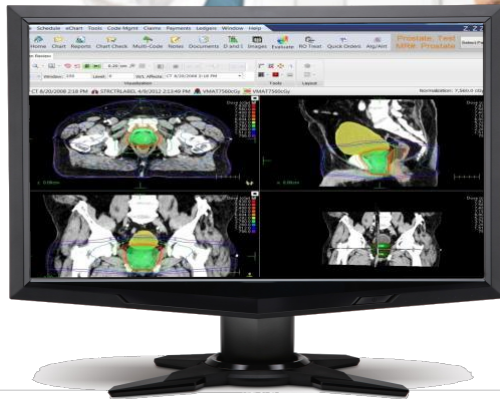
MOSAIQ® RTP



MOSAIQ® Evaluate

The first step along the way...

- Comprehensive plan review
- Full plan approval
- Full integration with MOSAIQ®
- Entirely new imaging framework



MOSAIQ® Evaluate is currently under 510(k) review by the U.S. FDA and is not yet commercially available in the U.S.



DVH templates

Dose (cGy)	Max. Dose (cGy)	Mean Dose (cGy)	Ref. Dose (cGy)	Ref. Vol. (%)	Inclusion %
7,640.0	8,028.2	7,827.0			100.0
7,654.3	8,028.2	7,825.8			100.0
5,127.3	8,017.6	7,548.3			100.0
7,760.9	7,967.3	7,850.7			100.0
220.1	8,017.6	4,186.1			100.0
260.5	8,017.6	4,254.1	>	6000	28.0
			>	5000	40.7
			>	4000	52.4
849.5	8,017.6	6,665.7			100.0
7,267.2	8,035.2	7,793.5	<	7560	97.1
1,569.0	6,467.6	3,853.5			100.0
0.0	7,973.6	1,191.4			100.0
0.0	8,035.2	748.1			100.0
249.1	4,394.8	2,522.8			100.0
849.5	8,035.2	7,336.9			100.0



MOSAIQ® RTP

Streamline your clinical workflow

- Reduced travel to dosimetry
- Integrated workflows
- Reduced interruptions
- Simplified chart rounds

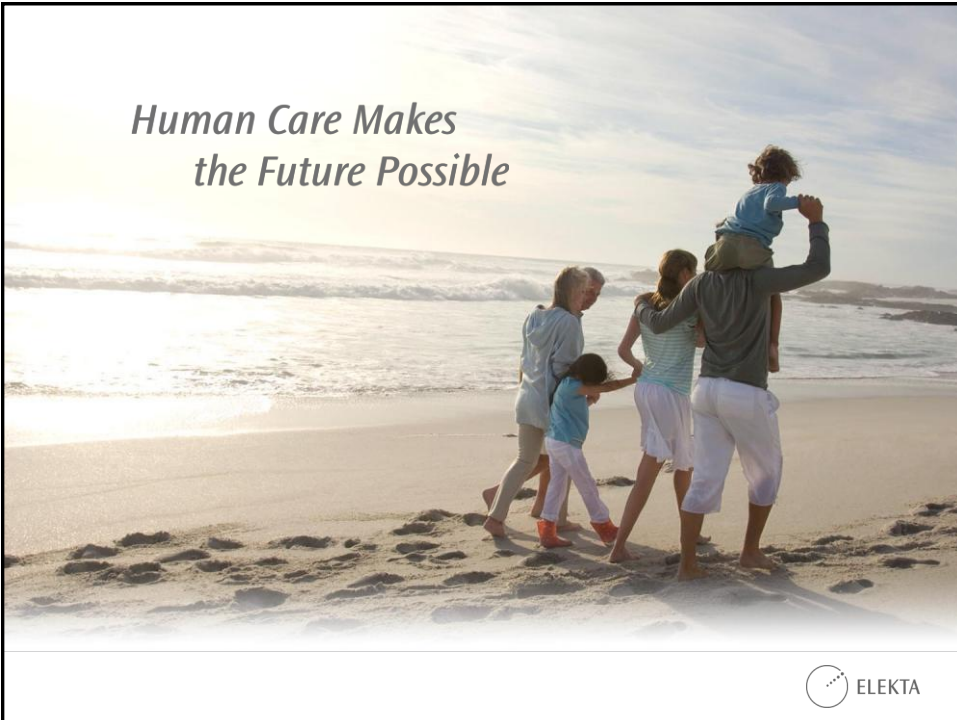


Innovations presented at ASTRO

- Connectivity to the Leksell Gamma Knife® and the Registry
- Connectivity to the Nucletron HDR including brachy charting in MOSAIQ®
- Open systems interface to the Cyberknife
- Latest releases of MOSAIQ® including Evaluate and IQ Scripts™
- ... and Monaco®
- ... and Oncentra®



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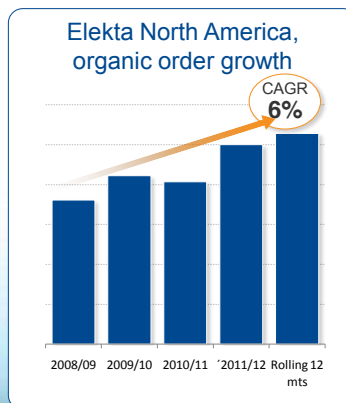
**Region
North America**

Jay Hoey
Executive Vice President



Strengthened presence in North America

- 7% of world's population
- 30% of the world's linear accelerators
- Most advanced radiotherapy market in the world
- Elekta has >60% market share in software (OIS) and brachytherapy. 24% in new sales of linacs
- Demand is driven from aging population and increasing cancer incidence as well as technological advancements



Organic growth: 9% incl. Nucletron



Well positioned for further growth

Installed base

- Enhance service excellence
- Provide advanced solutions
 - Streamlined workflow = higher efficiency
 - Advanced treatments = higher effectiveness

Linacs

- Siemens opportunity
- Agility™ roll-out

SRS/SRT solutions

- Elekta well positioned via SRS/SRT expertise
- Leksell Gamma Knife® performance & reputation

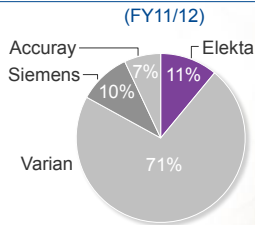
Software leadership

- New software applications for existing customers

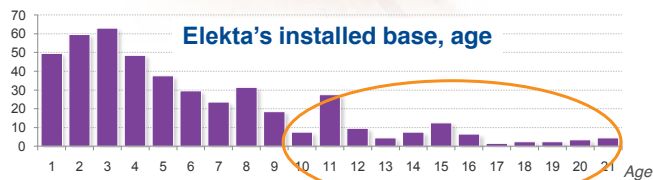
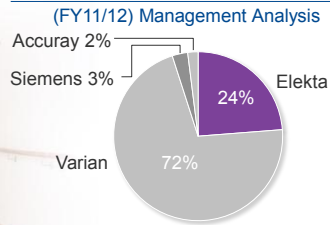


Elekta North America is gaining share

Market share - installed base



Market share – new orders



Sources: IMV, MD Buyline, Internal Win / Loss reports, Sales and Marketing G2



USA – world's largest RT market



United States

- Population: 314 M, cancer incidence: 1.5 M (~0.47%)
- ~63% receive radiation therapy

Radiation therapy - mainly a replacement market

- ~80% of linacs are replacement machines

Multiple factors drive demand

- Higher cancer incidence with aging population
- Equipment age (large installed base = large replacement market)
- New technology (SRS/SRT, VMAT)
- Private center consolidation



US reimbursement and health care tax



CMS reimbursement proposal

- Increase proposed for HOPPS, decrease for free-standing clinics
- Extensive discussions and activities from industry organizations

Affordable care and health care tax

- Result in upcoming election of importance
- Health care tax to be decided, unclear if and how it will be implemented



The Canadian market is expanding



- Population: 36 M, cancer incidence: 0.2 M (~0.51%)
- ~ 32% receive radiation therapy, government goal is 48%
- 33% growth in linear accelerators in Ontario, Quebec and British Columbia since 2000
- Linear accelerators replaced as part of government health agency replacement cycles (10-12 years for linacs)



Increased medical initiatives in Mexico



- Installed base:
 - ~ 65 linacs installed ~ 26 cobalt units
- ~70% government and ~30% private
- Government initiatives with funding approved for expanding in radiation medicine
- Private sector will expand radiotherapy and OIS segments (updating installed base)
- Increased marketing efforts and business presence in Mexico by Elekta
- Elekta's market share is increasing



Elekta is growing

- Technology leadership
- Highest standard in service and aftermarket support
- Focus on comprehensive solutions and partner with customer
- Leverage on strong footholds within software (OIS) and brachytherapy



Good progress in Agility™ roll-out



Johns Hopkins Hospital

- World renowned, top ranked hospital in the US*
- 2 Agility installations



William Beaumont Hospital

- Top 5 academic hospital**
- 2 Agility installations



UC Davis Medical Center

- Top 10 Hospital in America***
- 1 Agility installation



* U.S. News & World Report 2012 Best Hospitals
 ** University Healthcare Consortium 2012 Quality Leadership Award
 *** American Alliance of Healthcare Providers 2012 Choice Awards



October 2012 IMV Satisfaction Ratings*

Category	Rating of Highly Satisfied	2012 #1 Manufacturer
Manufacturer performance	Ability to drive industry standards	Elekta
	Competence of install team	Elekta
System performance	Overall system ease of use	Elekta
	Reliability of hardware	Elekta
	System uptime meets expectations	Elekta
Service performance	Overall service performance	Elekta
	Service follow-up	Elekta
	Service performance relative to amount charged	Elekta
	Effective escalation by service team	Elekta



*ServiceTrak™ Imaging 2012 - Radiation Oncology Accelerators – Highly satisfied ratings – IMV report, October 2012



IMV Ratings*

Outcome of **Number 1** position in sub-items

	2010	2011	2012
Elekta	7	15	23
Varian	16	16	10
All	35	37	43



*ServiceTrak™ Imaging 2012 - Radiation Oncology Accelerators – Highly satisfied ratings – IMV report, October 2012



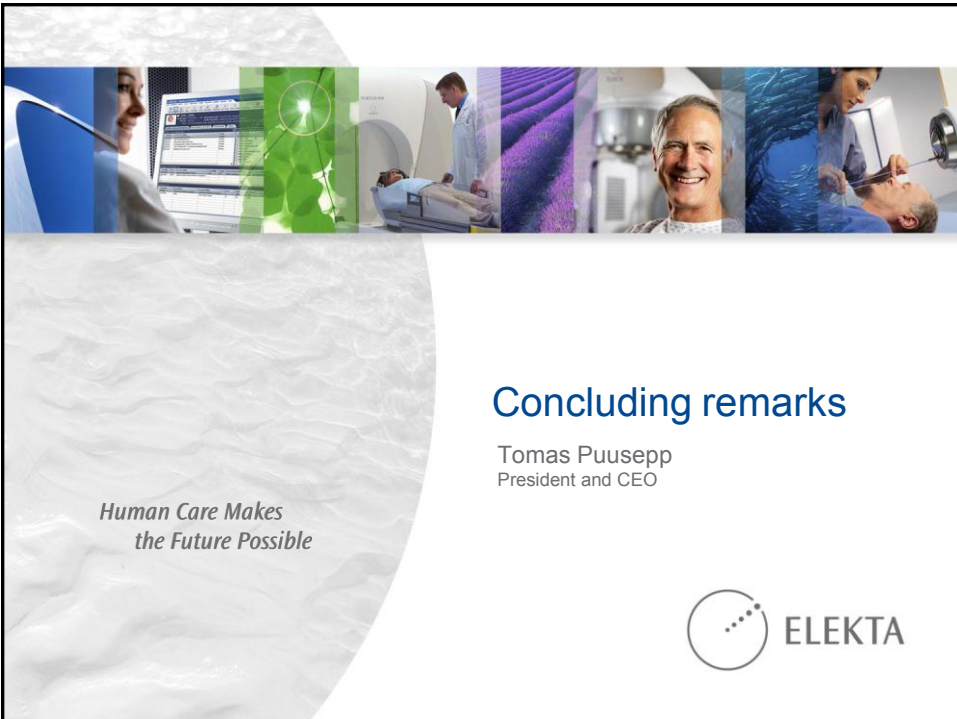
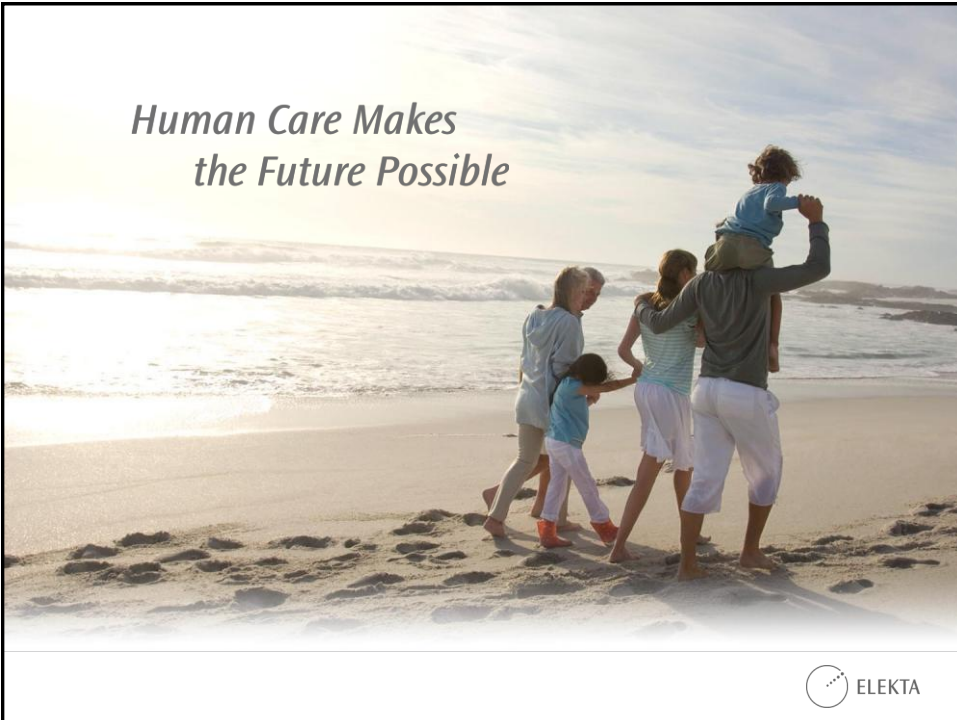
Top customer satisfaction in the US

CUSTOMER SATISFACTION

- #1 Leksell Gamma Knife® Perfexion™
- #2 Elekta Synergy®
- #3 Elekta Mosaic®
- #4 Varian TrueBeam



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Concluding remarks

Tomas Puusepp
President and CEO



Pioneer development and facilitate increased usage of radiation therapy

- Comprehensive solution offerings to meet future requirements
- Increase utilization of radiation therapy by extending penetration in existing markets and improve accessibility in emerging markets
- World class organization with a strong focus on patient needs



Elekta's ambition: increased usage of radiation therapy



Today: close to
1 million
patients

Aspiration:
2 million
patients



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