





Investor meeting at ASTRO

September 16, 2019

Agenda

Setting the new standard in value-based healthcare

**Dr Richard Hausmann,
President and CEO Elekta**

Quality radiation therapy accessible for all

**Maurits Wolleswinkel,
President Linac Solutions**

Elekta digital solutions elevating outcomes

**Sukhveer Singh, President
Oncology Informatics Solutions**

Important information

This presentation includes forward-looking statements including, but not limited to, statements relating to operational and financial performance, market conditions, and other similar matters. These forward-looking statements are based on current expectations about future events. Although the expectations described in these statements are assumed to be reasonable, there is no guarantee that such forward-looking statements will materialize or are accurate. Since these statements involve assumptions and estimates that are subject to risks and uncertainties, results could differ materially from those set out in the statement. Certain of these risks and uncertainties are described further in the Annual Report in section “Risks and uncertainties”. Elekta undertakes no obligation to publicly update or revise any forward-looking statements, whether as a result of new information, future events or otherwise, except as required by law or stock exchange regulations.

This 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 has products to treat these indications.



Setting the new standard in value-based healthcare

Dr Richard Hausmann, President and CEO

We are Precision. Radiation. Medicine.

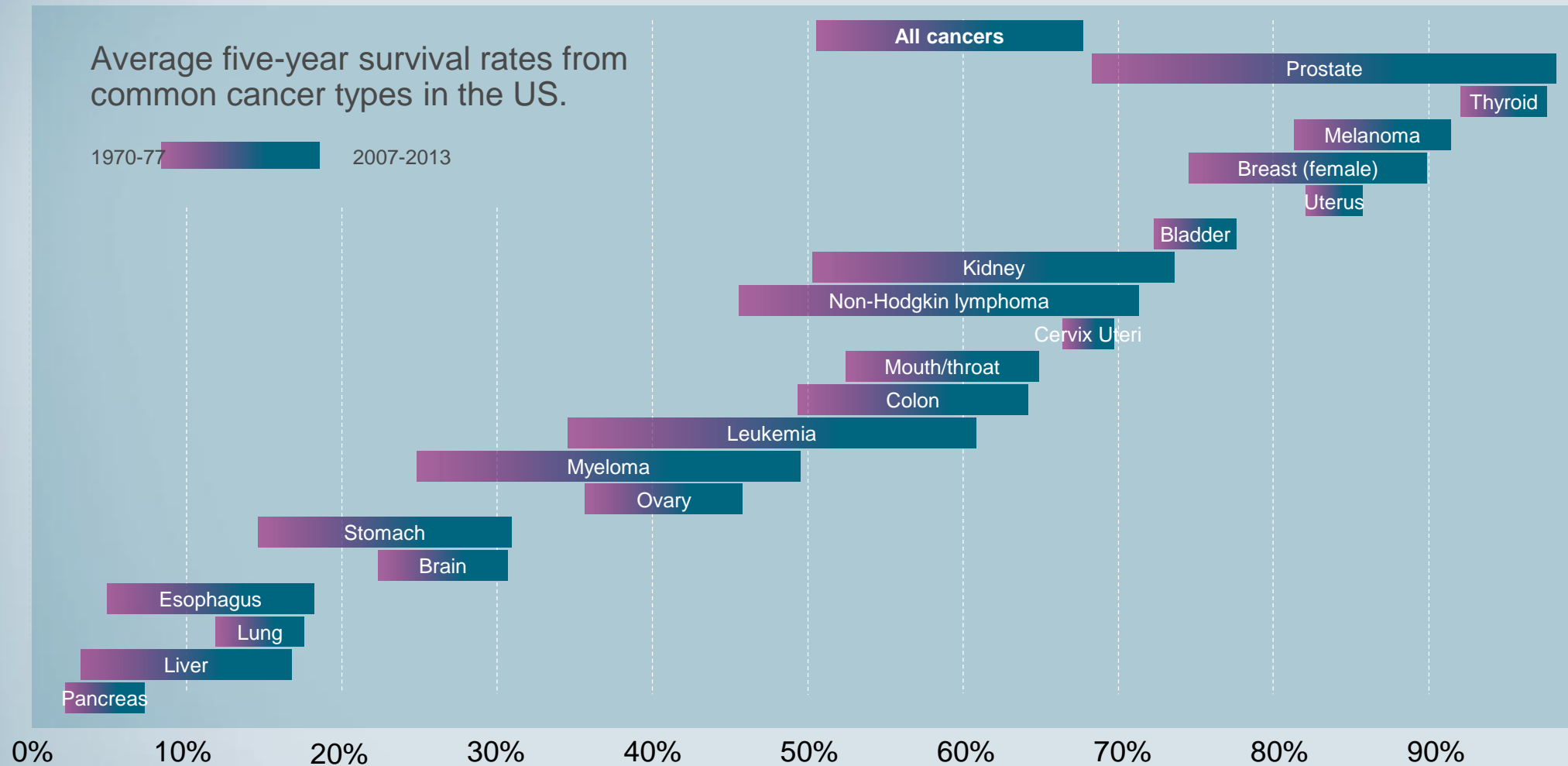
Everyone with cancer should have access to and benefit from precise, personalized radiotherapy



The need for Precision Radiation Medicine

Average five-year survival rates from common cancer types in the US.

1970-77 2007-2013



Improve operational efficiency and patient experience by hypofractionation

Improve outcomes by safe dose escalation

Patient outcomes and access shaping industry trends

Alternative
Payment
Model

New EU
cancer
agenda

Chinese
cancer
program

Growing
economies

**Trends aligns well with our strategy of
Precision Radiation Medicine**

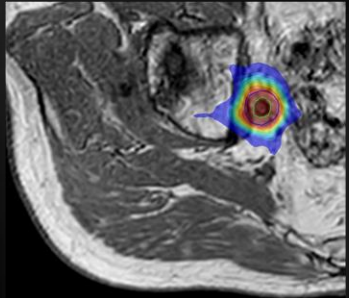
Elekta Unity

Unlocking

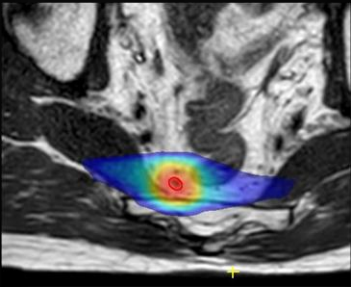
hypofractionation possibilities
and clinical discoveries for
new anatomies



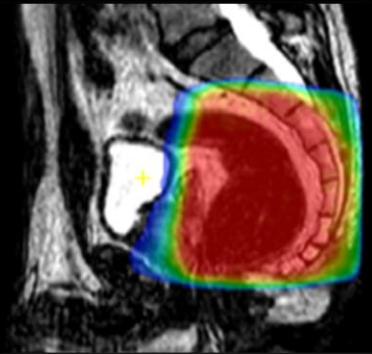
Clinical utilization from Aug 2018 until Sep 2019



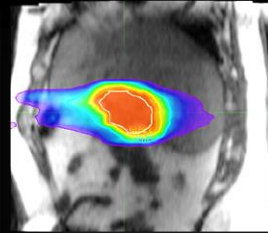
UMC Utrecht



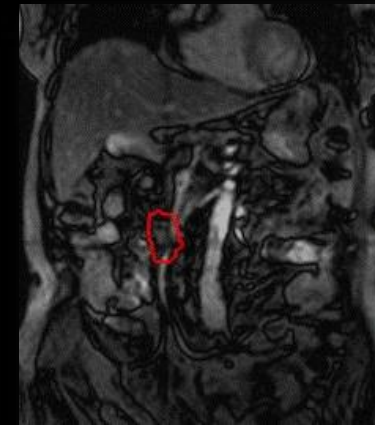
UMC Utrecht



UMC Utrecht



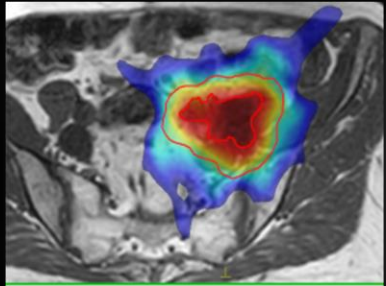
MCW



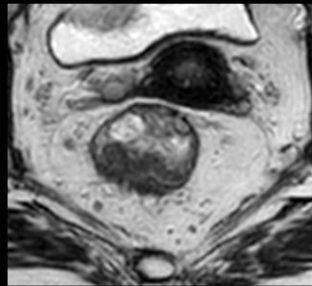
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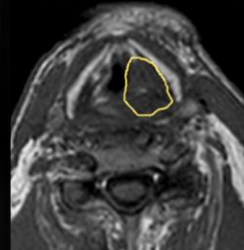
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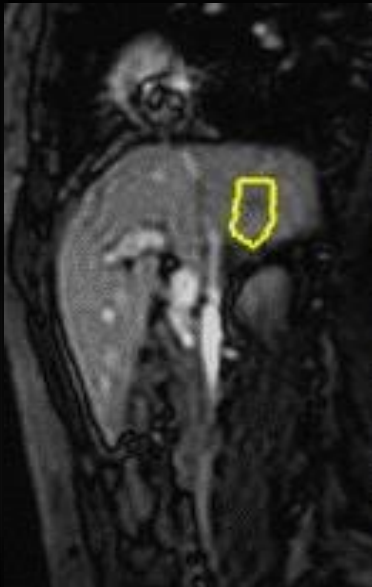
Univ Tubingen



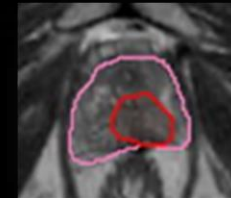
Univ Tubingen



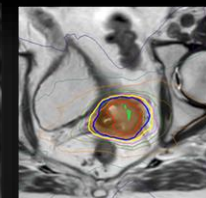
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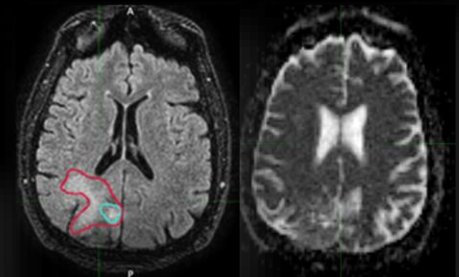
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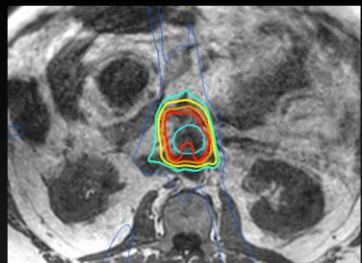
Odense



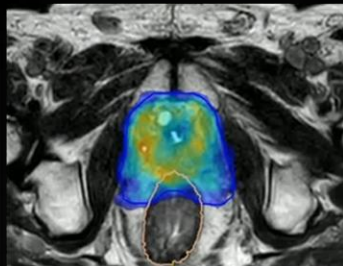
Odense



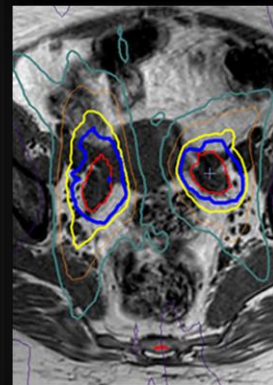
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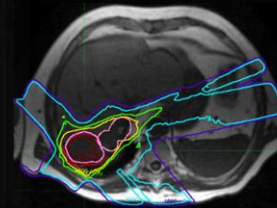
Univ. Tubingen



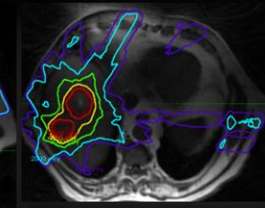
AvL-NKI



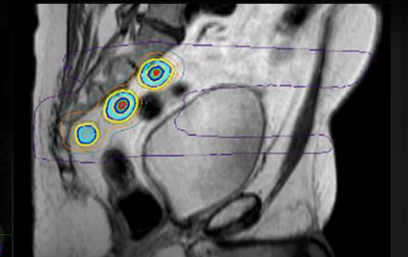
Odense



MCW



MCW



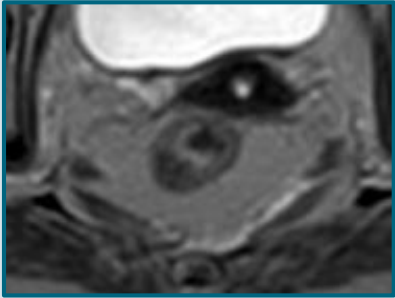
Odense

Rectal tumor disappearing in 50 days



Reference

3D T2 MR 6 min



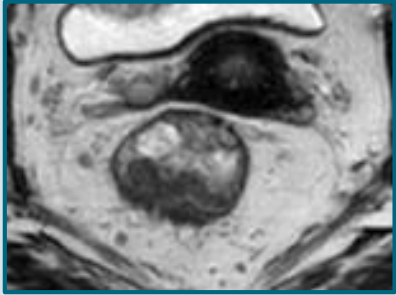
Day 38

3D T2 MR 2 min



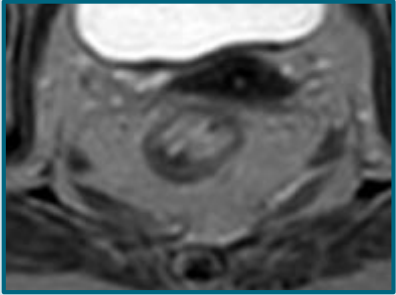
Baseline

Endoscopy



Mid-treatment

3D T2 MR 2 min

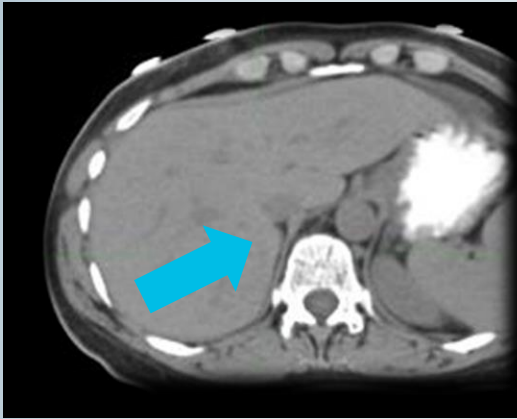


Day 50

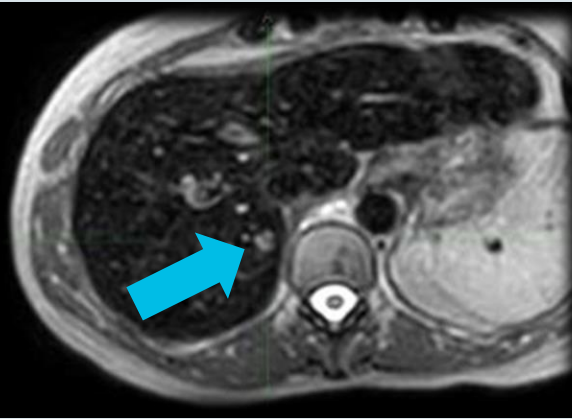
Endoscopy

Liver metastasis with Elekta Unity

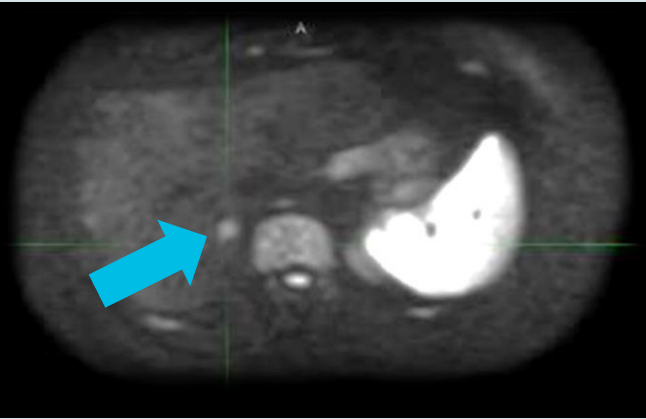
Planning CT



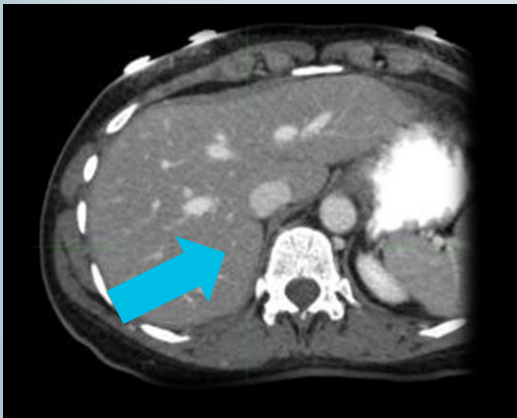
Navigated T2



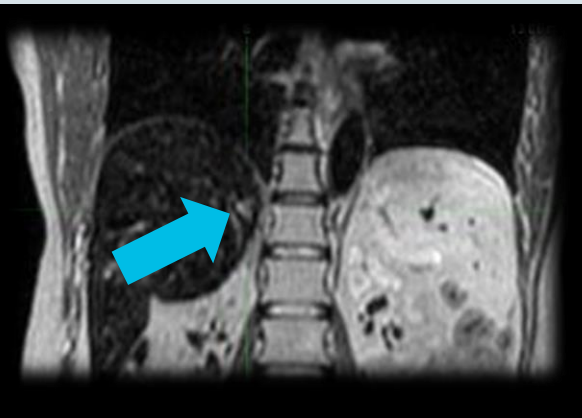
DWI



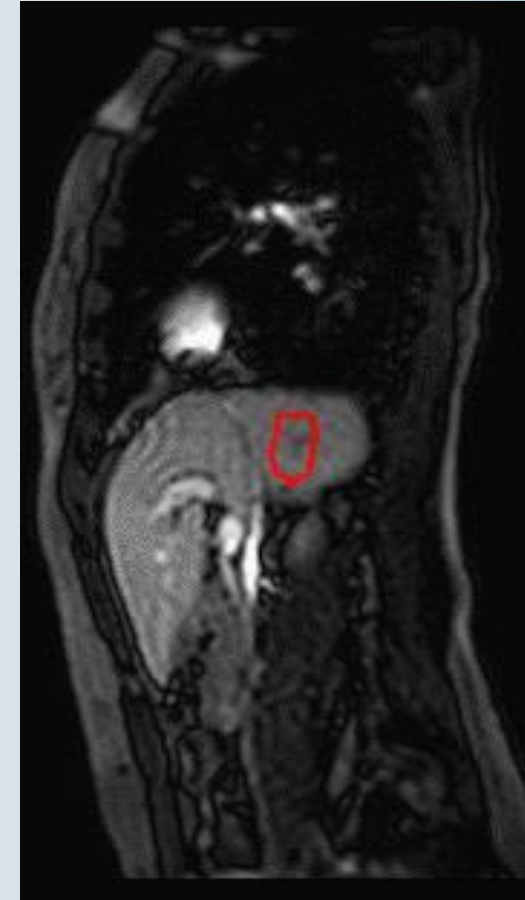
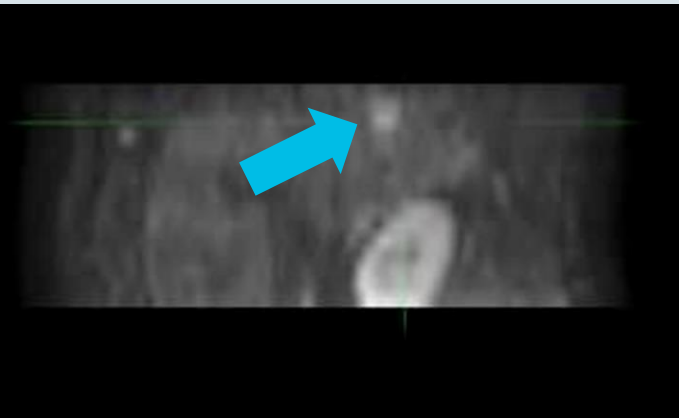
IV CT



Navigated T2 Cor reformat

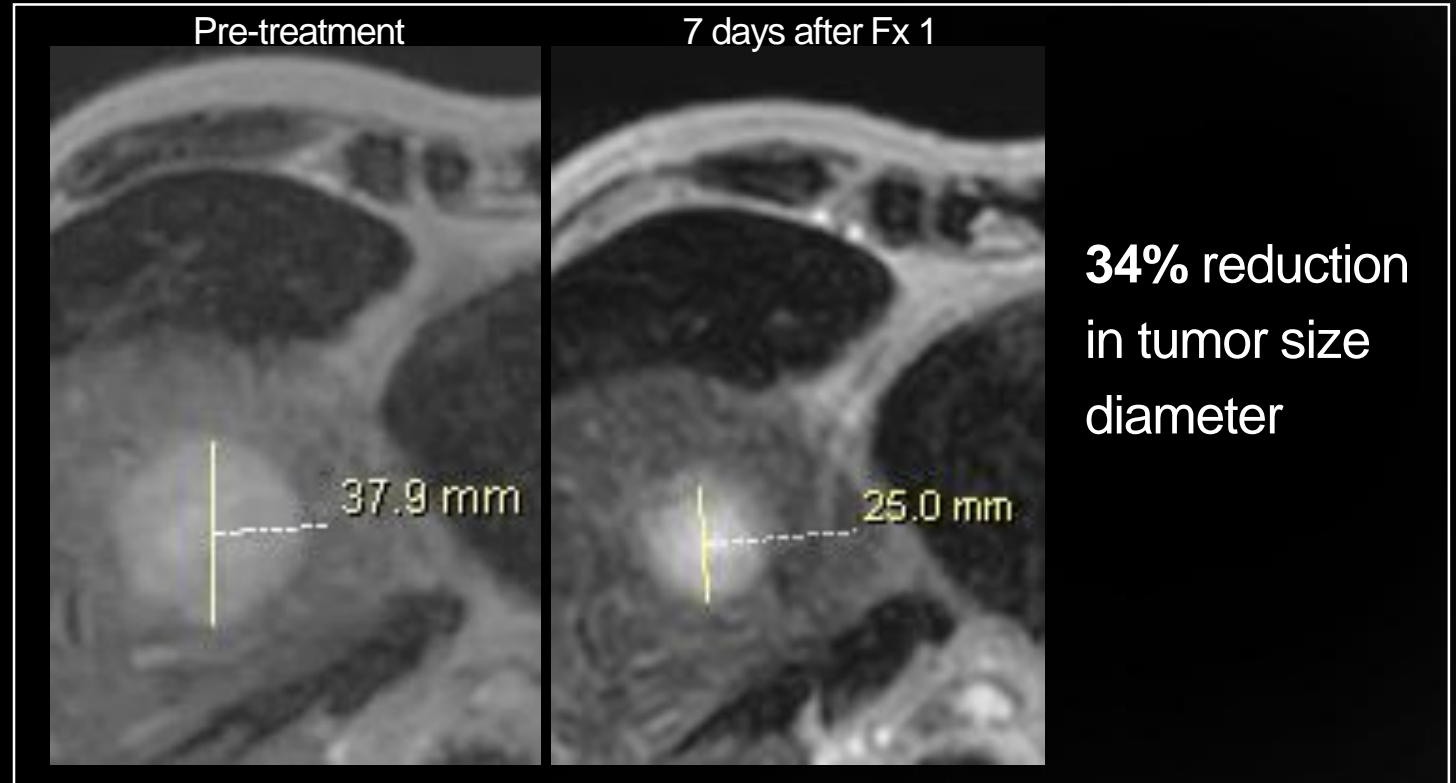
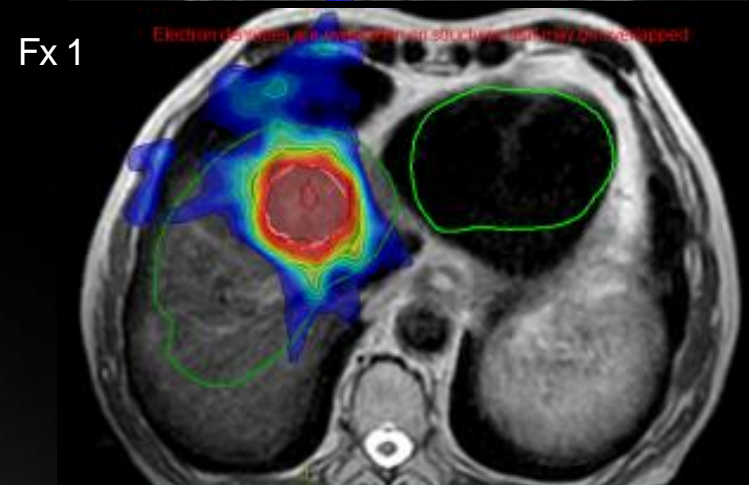
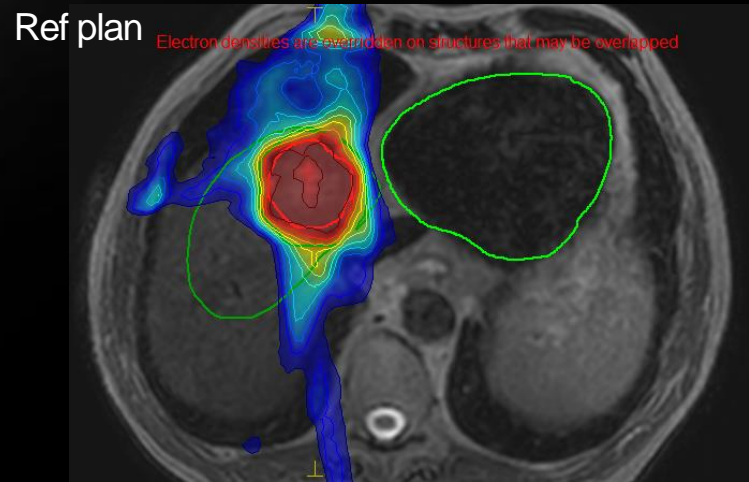


DWI Sag reformat



Beam-on monitoring
(Sagittal plane)

Clinical precision



Leksell Gamma Knife®

ZERO Margin

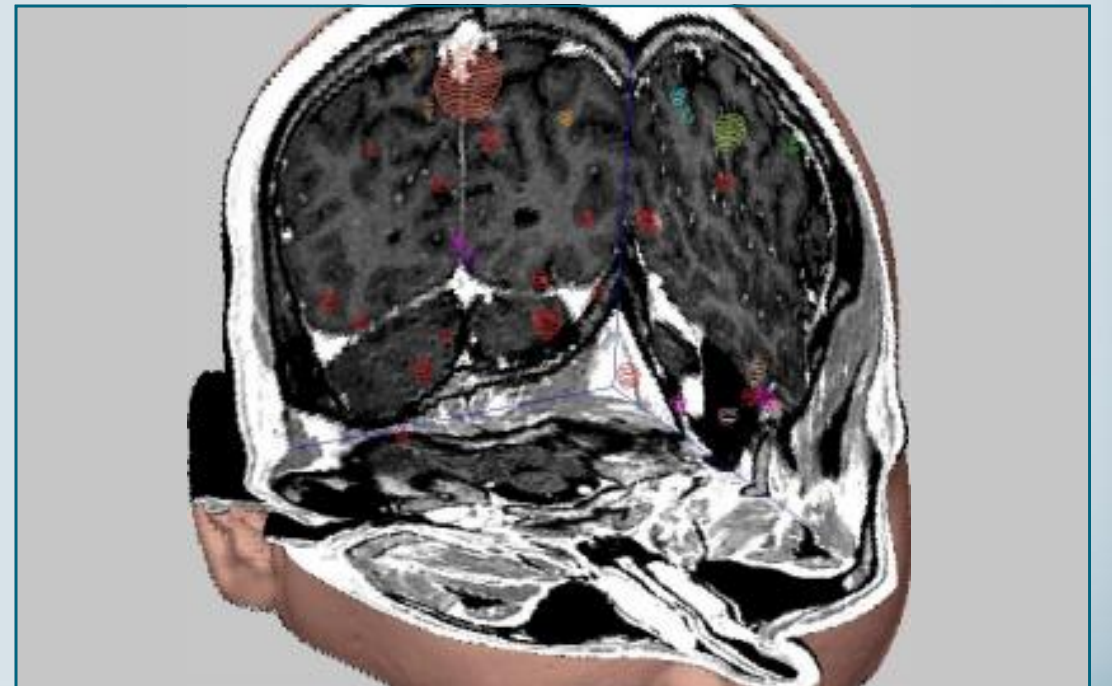
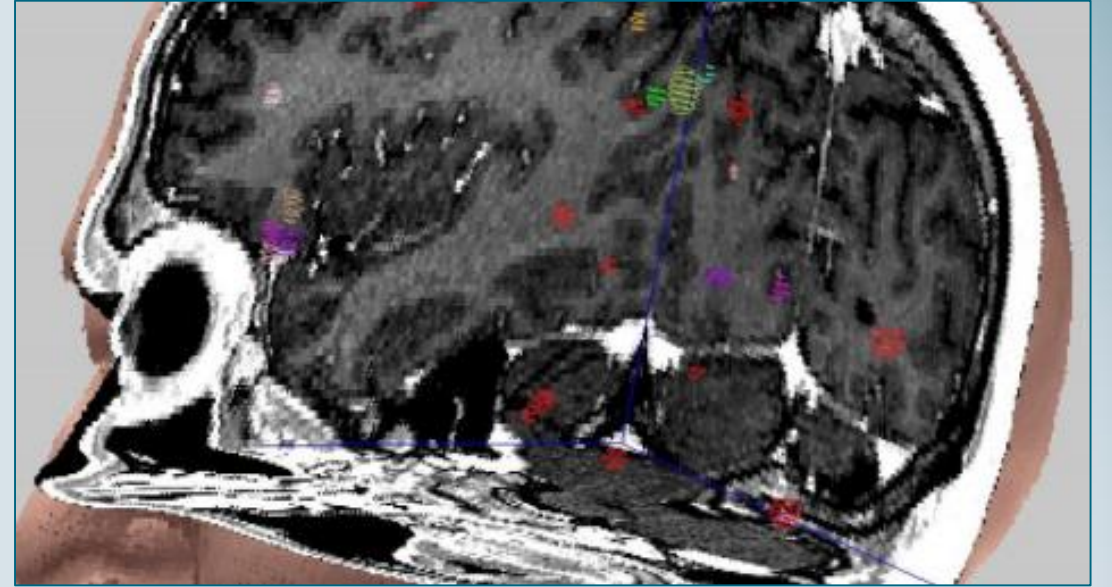
ZERO Delay

ZERO Harm



Treatment of multiple brain metastases

Young patient with 34 brain metastases treated efficiently, sparing healthy brain tissue and avoiding neurocognitive decline



Brachytherapy

Going
where the tumor is
– that's precision



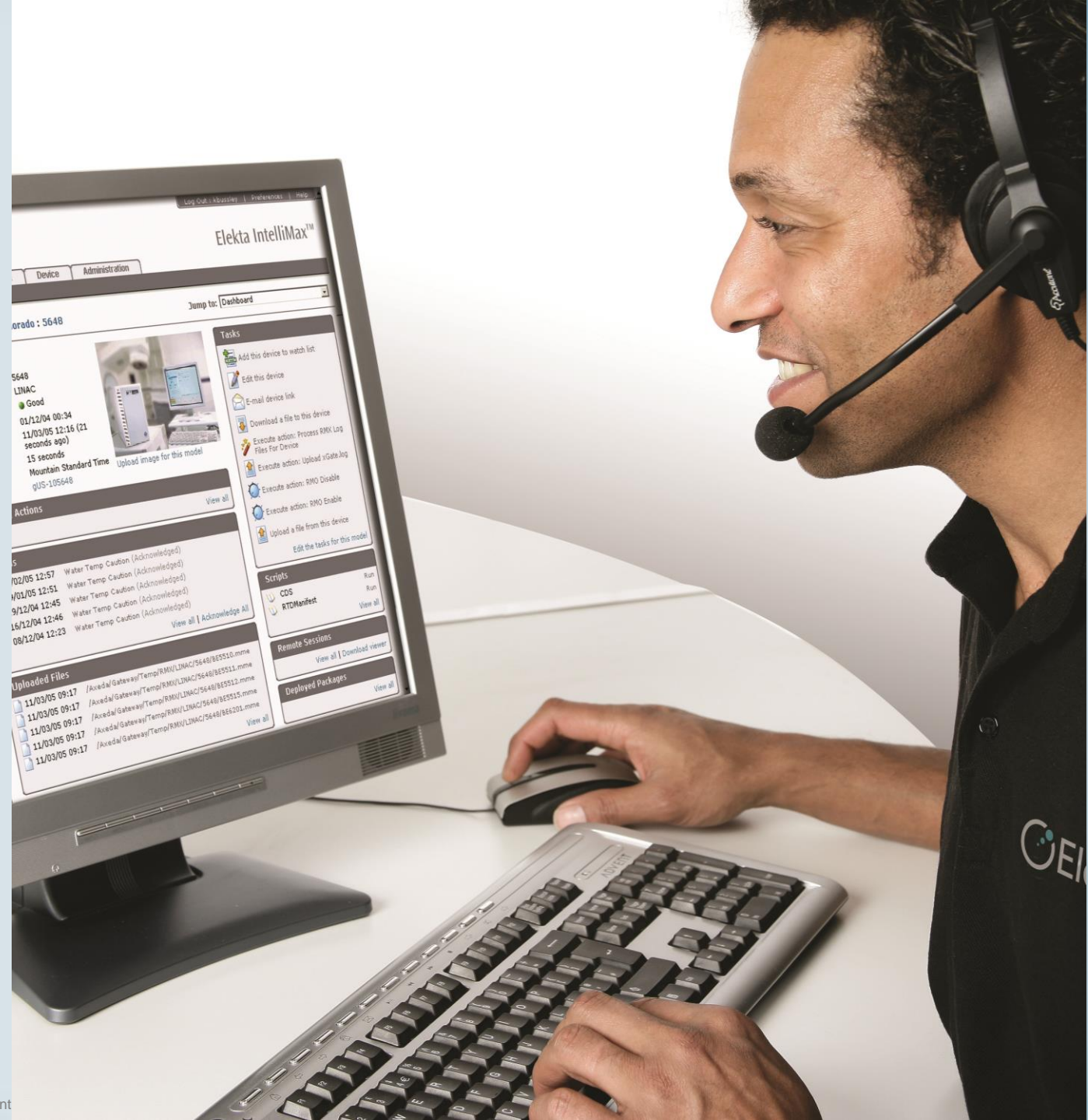
AI-driven service

75%

of our predictive cases were raised by IntelliMax[®] AI algorithms

>3,000

IntelliMax-generated cases have been raised to avoid clinical interruptions/downtime



Introducing ProKnow

Standardize quality of treatment

Centralize, archive, view and analyze treatment planning data

Automated Metrics and Performance Scorecards

Cloud base scalable framework



New standards in value-based healthcare

- MR-linac is driving market growth
- Innovation is the way to improve:
 - Clinical workflow
 - Patient outcome
- "Good enough" is not good enough



**Elekta is well positioned
for future growth**



Precision radiation accessible for all

Maurits Wolleswinkel, President Linac Solutions

Precision radiation accessible for all

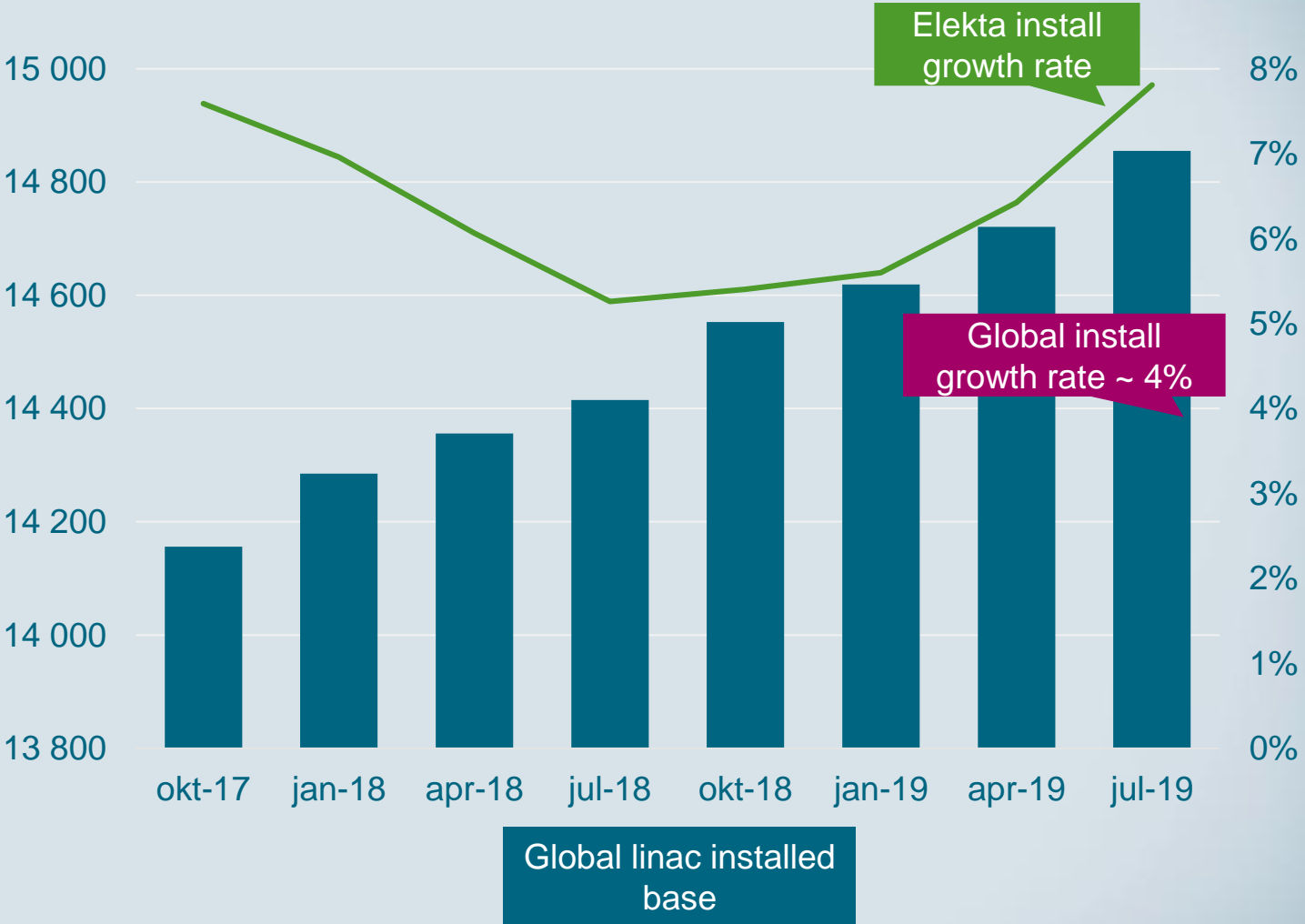
**Market
position**

**Innovation
agenda**

**New at
ASTRO**

Elekta's installed base growing faster than global market

- Solid order and revenue growth
- Gain market share in growth markets
- Stable development in mature markets
- Growing treatment planning system (Monaco[®]) adoption in installed base



We see the customer needs clustered in 3 distinct segments

Synergy[®] HD

Growth market indications

Basic workflows,
throughput focus

Low cost of ownership

ACCESS

Affordable productivity

Infinity[™] HD

All indications incl.
SRS/SBRT

Multifunctional in capabilities,
streamlined workflows

Competitive cost of
ownership

PERFORMANCE

Versatile performance

Versa[™] HD

Expand hypofractionated &
stereotactic capabilities

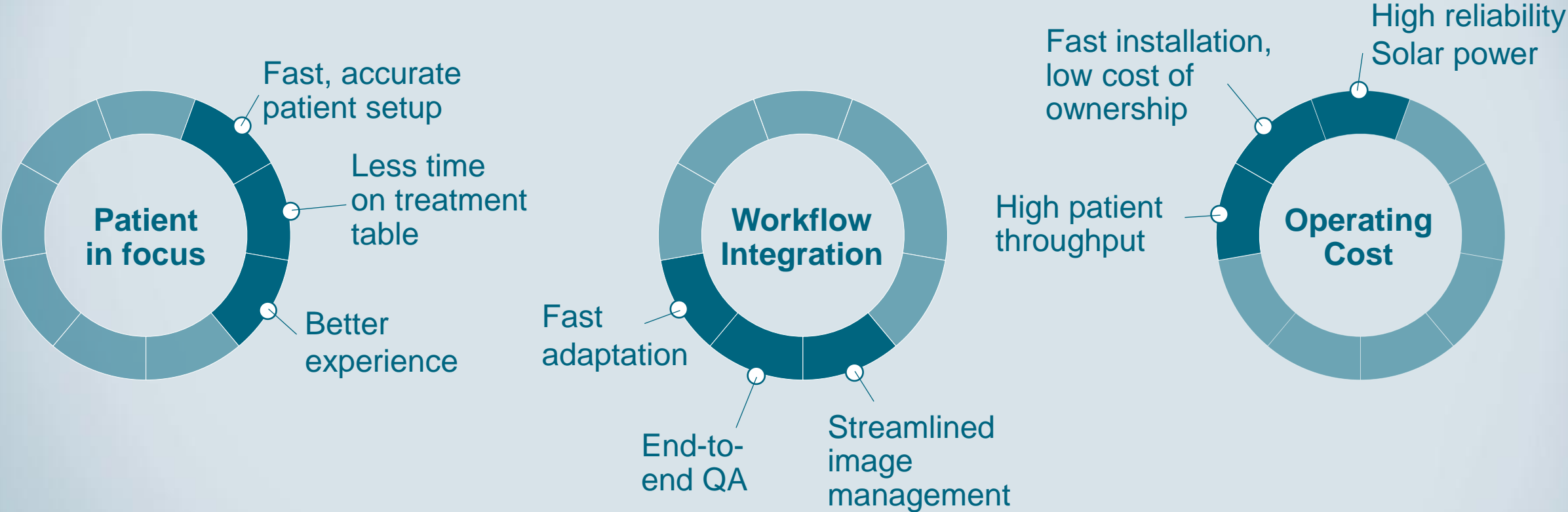
Workflow integration and on-
line adaptive capabilities

Competitive cost of
ownership

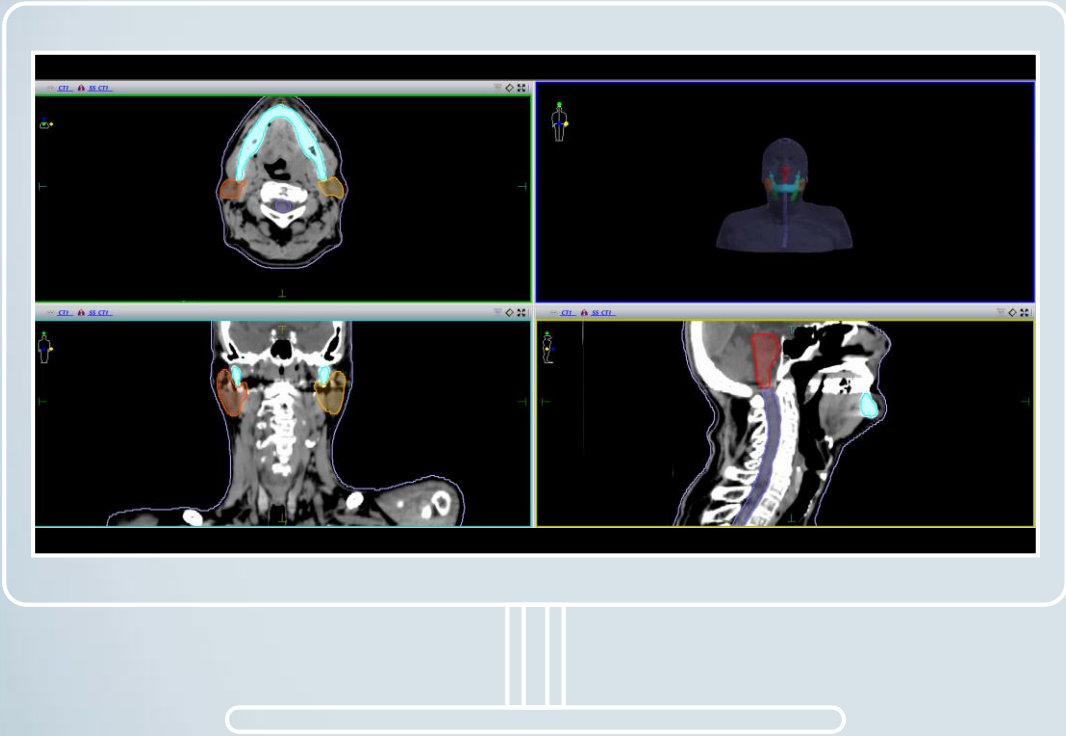
EXCELLENCE

Focused precision

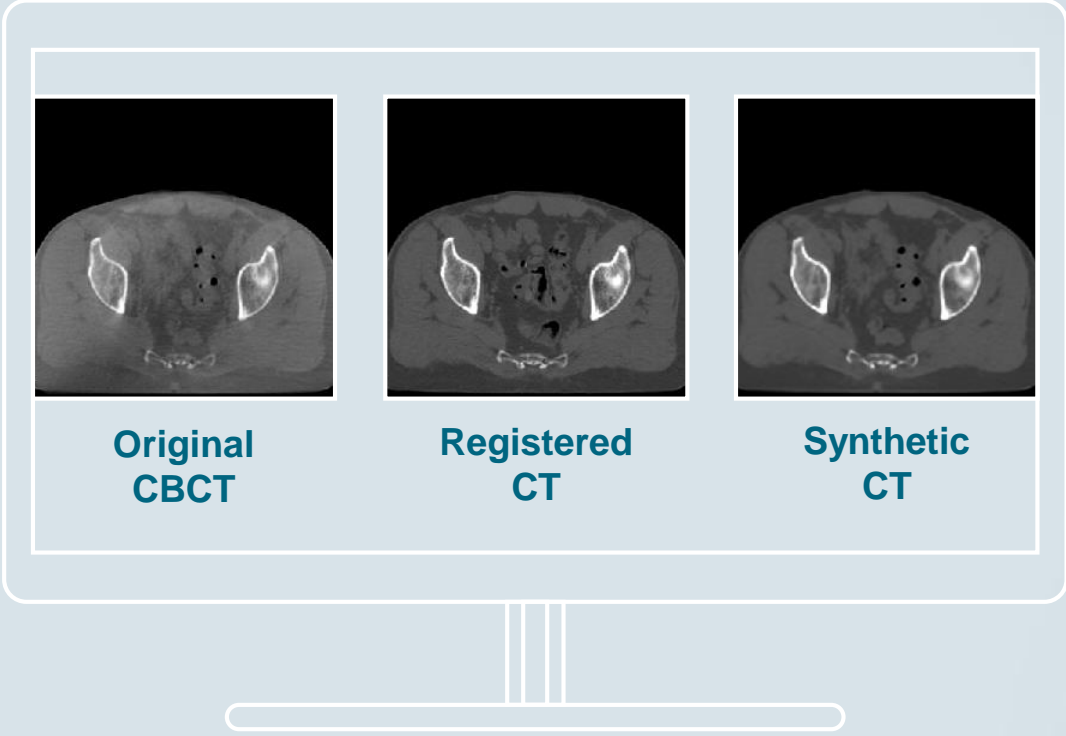
Next innovations focusing on nine areas around the patient, workflow and costs



Key enabler; AI-driven solutions



AI auto-segmentation models



AI synthetic CT creation from CBCT and MRI

Expanding our linac portfolio

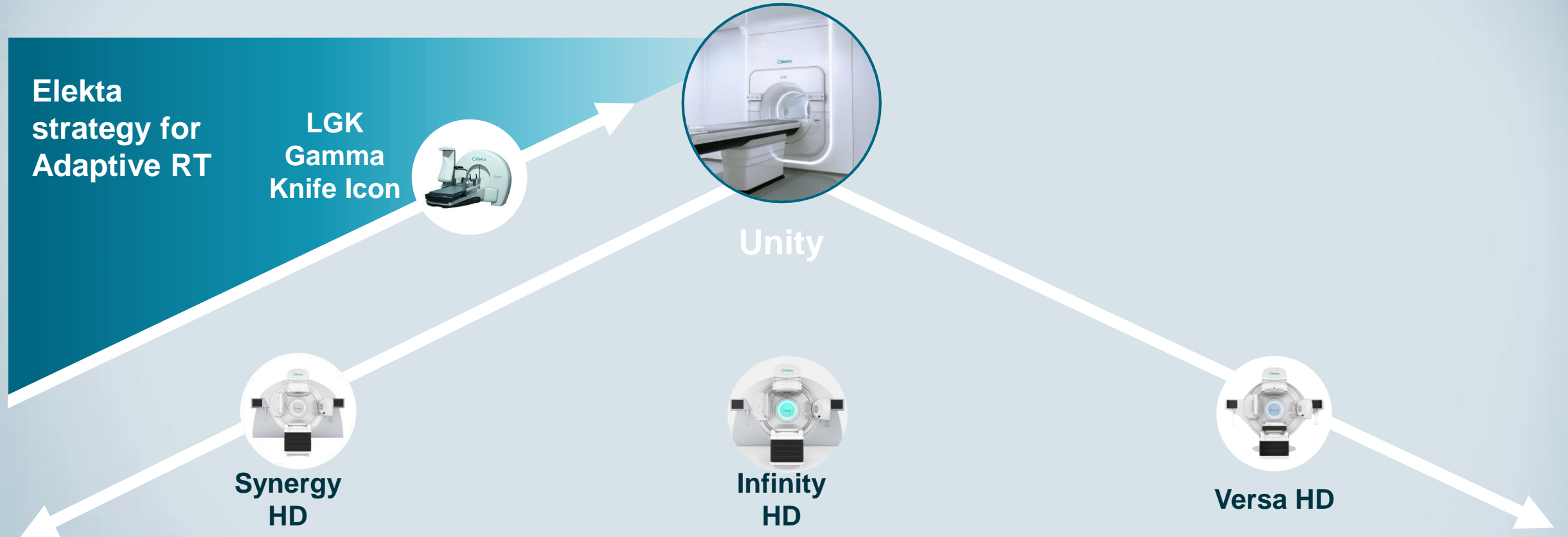
Precision Radiation accessible for all

- Versatility
- Footprint & installation
- Workflow integration
- Usability



Elekta approach to adaptive RT

Release new real-time adaptive platform



Elekta
strategy for
Adaptive RT

L GK
Gamma
Knife Icon

Unity

Synergy
HD

Infinity
HD

Versa HD

Leverage real-time adaptive platform in mainstream systems

Introducing response driven personalized care with RGRT

Response Guided Radiation Therapy



01

Innovation from ground-breaking Elekta Unity

02

Respond to changes and personalize treatment

03

Fast and easy workflow

Acquisitions and collaborations to drive more precision and workflow integration

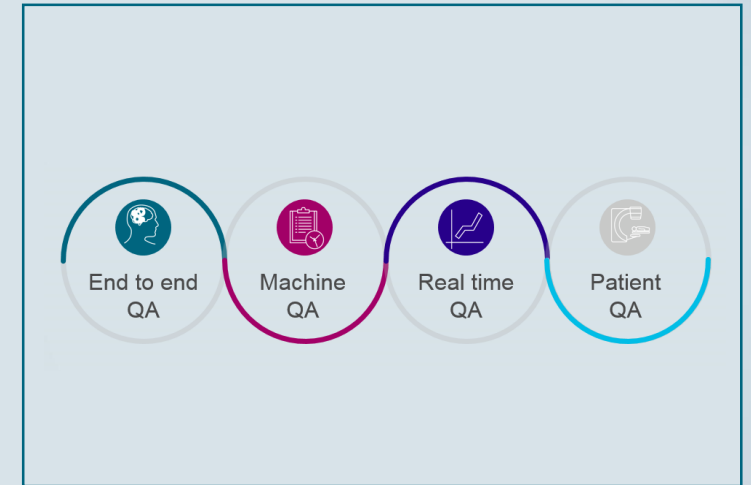
ProKnow acquisition



Surface Guidance with C-RAD



Complete QA portfolio





Stereotaxy made easy

Versa HD



C-RAD SIGRT package*



RTsafe

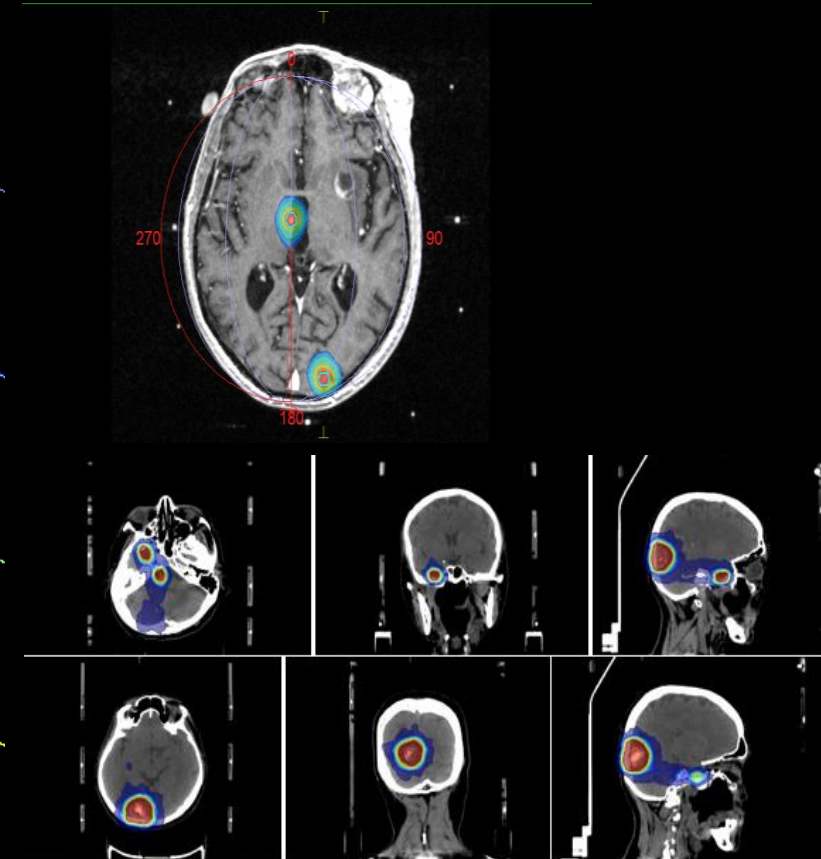
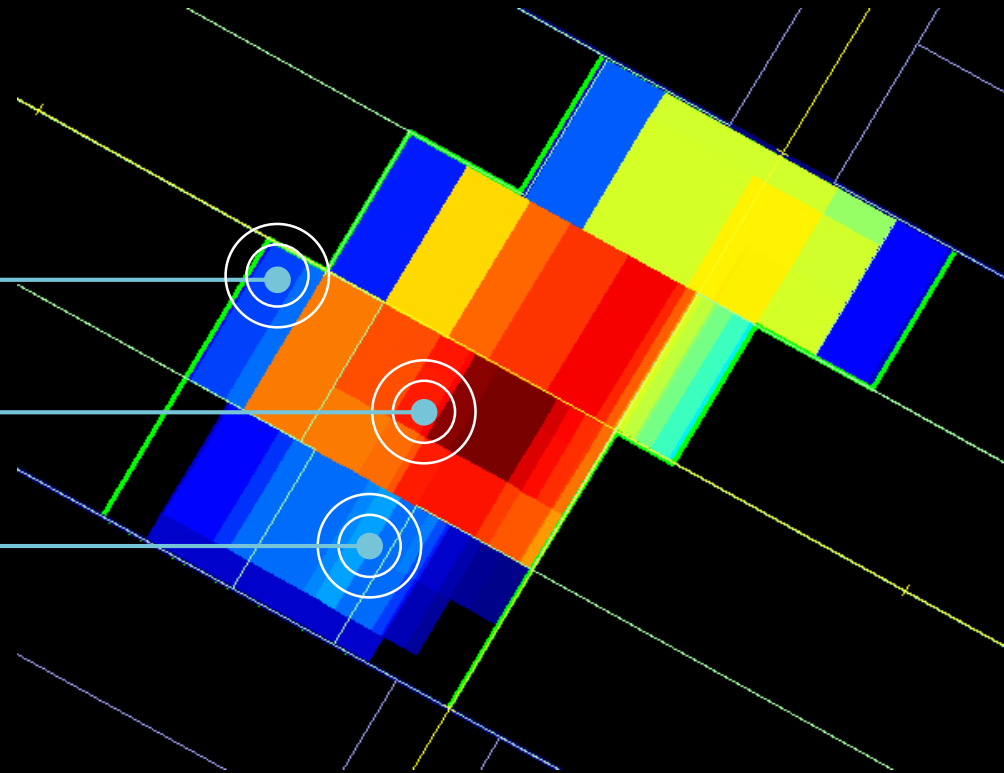


HDRS; 1mm resolution enables leading stereotactic performance

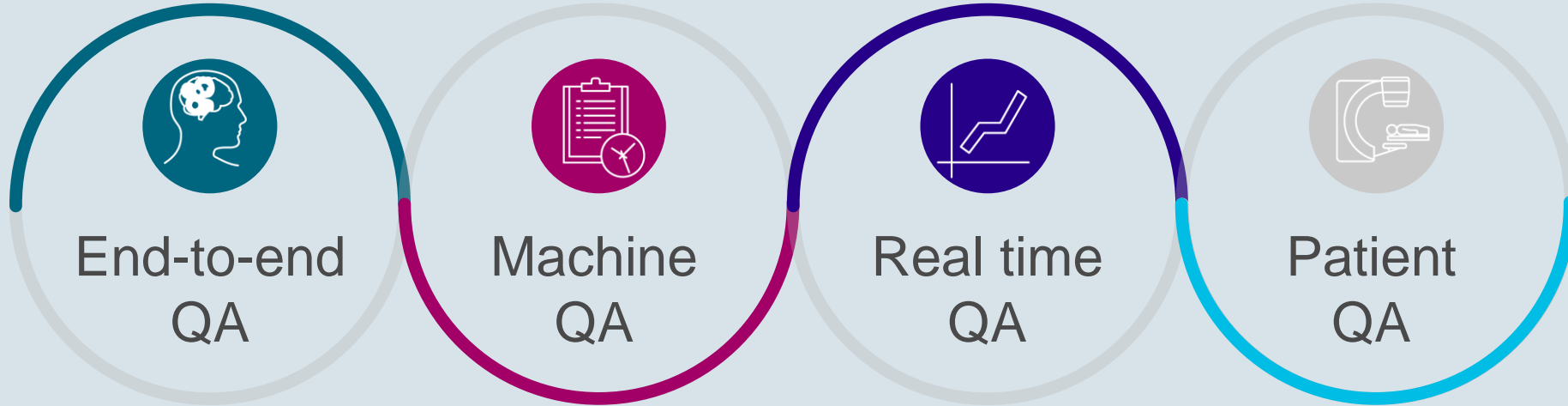
Dynamic jaws move from segment to segment

Hi-resolution
1mm increments

Mimics effects of dynamic
1mm leaves for small fields



The strategic elements for QA are now in place



Precision radiation accessible for all

The background of the slide is a dark, futuristic industrial or laboratory environment. It features a large, circular structure with a glowing blue light source at its center, creating a lens flare effect. The scene is filled with various mechanical components, pipes, and panels, some of which are illuminated with blue light. A yellow warning sign with a black exclamation mark is visible on the left side of the structure. The overall atmosphere is one of advanced technology and precision.

Strong
portfolio

Continued
substantial growth of
installed base

Acceleration of
innovation

Addressing future
needs around
data, automation,
integration and cost
of ownership

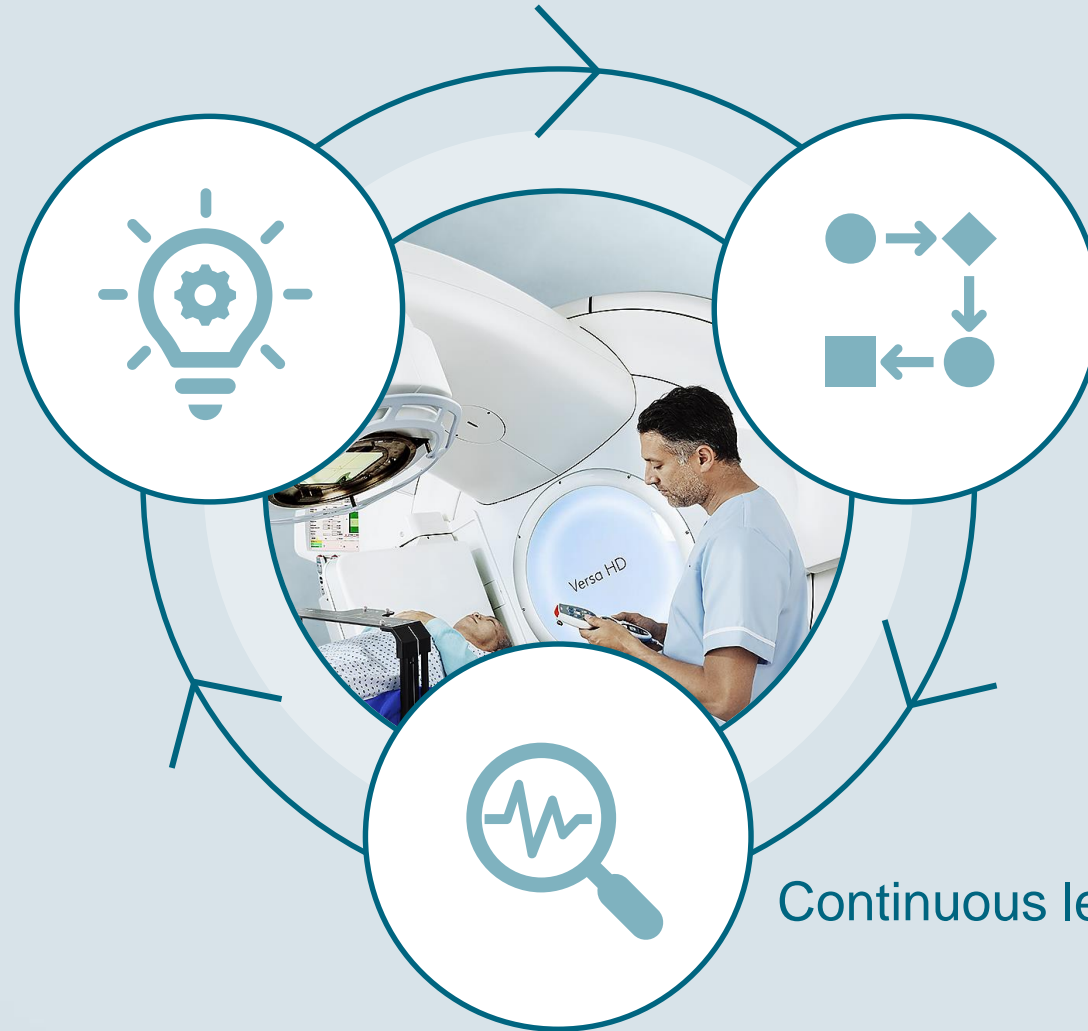


Elekta Digital Solutions elevating outcomes

Sukhveer Singh, President Oncology Informatics Solutions

The framework of software driving value-based care

Evidence-driven
decision-making

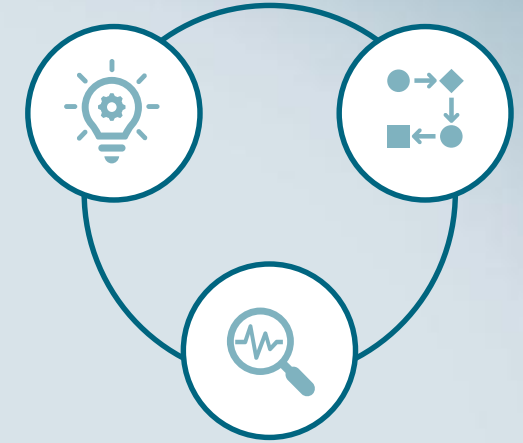


Workflow efficiency
and standardization

Continuous learning

MOSAIQ[®] Plaza

Intelligence for value-based healthcare



Evidence-based decision support



IBM Watson for Oncology

Humans + AI = Augmented Intelligence

Humans excel at:

- common sense
- imagination
- abstraction
- morals
- compassion
- generalization

AI excels at:

- natural language
- pattern identification
- locating knowledge
- machine learning
- reducing bias
- repetition and consistency

AI-driven decision support based on the latest published evidence and trials

MOSAIQ care collaboration

Hello Dr. Smith

Meetings My Patients

20 Aug 2018 - 26 Aug 2018

Monday 20 Aug 2018

Time	Meeting	Date	Patients	Buttons
11:00 am	Lung	Mon 12 Jun 11:00 am	36 patients (3 approved, 44 not)	Join
14:00 am	Breast	Mon 12 Jun 11:00 am	65 patients (12 ready, 53 not ready)	Open

Friday 24 Aug 2018

Time	Meeting	Date	Patients	Buttons
11:00 am	Urology	Mon 12 Jun 11:00 am	10 patients (0 ready, 10 not ready)	Open

Multidisciplinary Tumor Board support & Chart round decision review

MOSAIQ's single source of truth



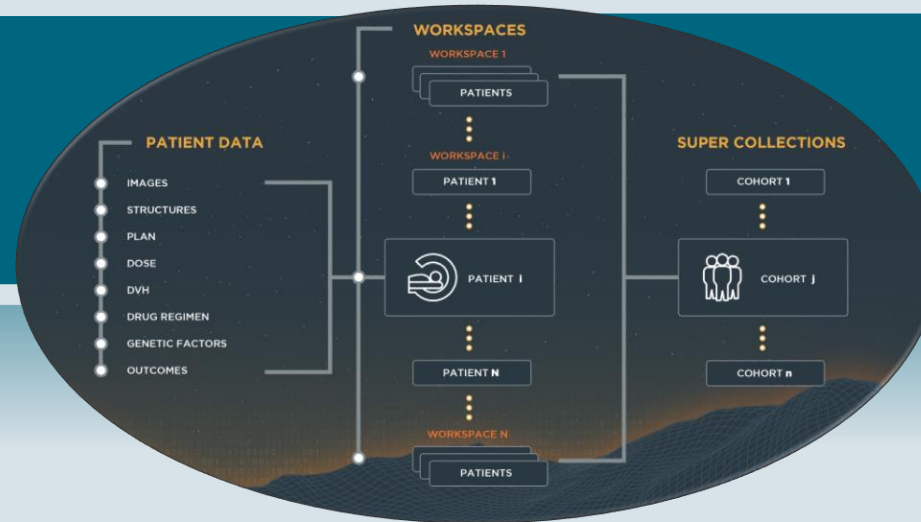
Multidisciplinary single database for all oncology that captures all decision points for every episode



Increased precision with real world data analytics



Analyze
single
patient



Analyze
patient
populations

RT-PACS universal
and cloud-based

Distributed contouring

Remote peer review

Automated performance scorecards

Custom metrics (clinical outcome)

Evaluate individual vs.
'big data' cohorts

Integrated and intuitive

Cohort management

Statistical process control

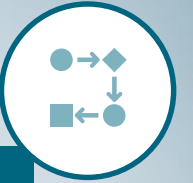
Comparative effectiveness

Case study libraries

Clinical trials & outcomes analysis

ProKnow® =
System of **Profound Knowledge**

Standardized pathways increase efficiency

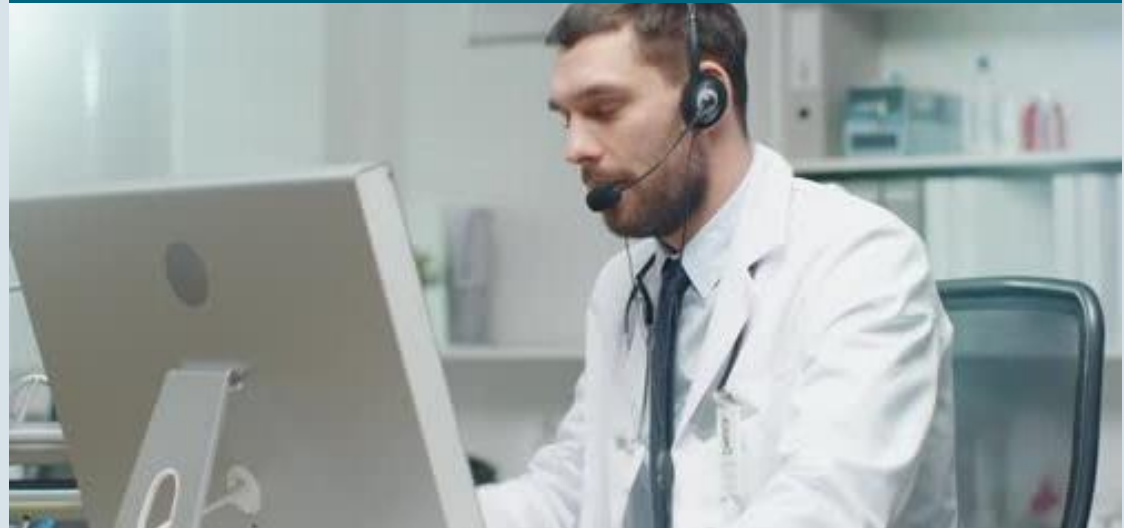


MOSAIQ SmartClinic



- MOSAIQ virtually anywhere
- SmartBoard-driven workflows
- Role-based pathway compliance
- Reduce physician burnout

MOSAIQ Voice Automation



- Save 125 hours every year
- Voice-created structured data
- Eliminate transcription costs
- 5-minute document availability

Our customers state the importance of clinical workflow



“SmartClinic is going to revolutionize clinical workflow. It helps to address physician burnout. You are hitting the nail on the head!”

Christopher D Jahraus MD FACRO
ABR Certified Radiation Oncologist
Generations Radiotherapy & Oncology, PC



Real-world data driving continuous learning



MOSAIQ® Oncology Analytics

- Measure and benchmark outcomes
- Optimize resource utilization
- Activity-based costing
- Ensure compliance to evolving payment models

METRIQ® Cancer Registry

- Over 3 million outcome records in US
- Align operational decisions with clinical outcomes



Elekta cloud – further improvements to workflow



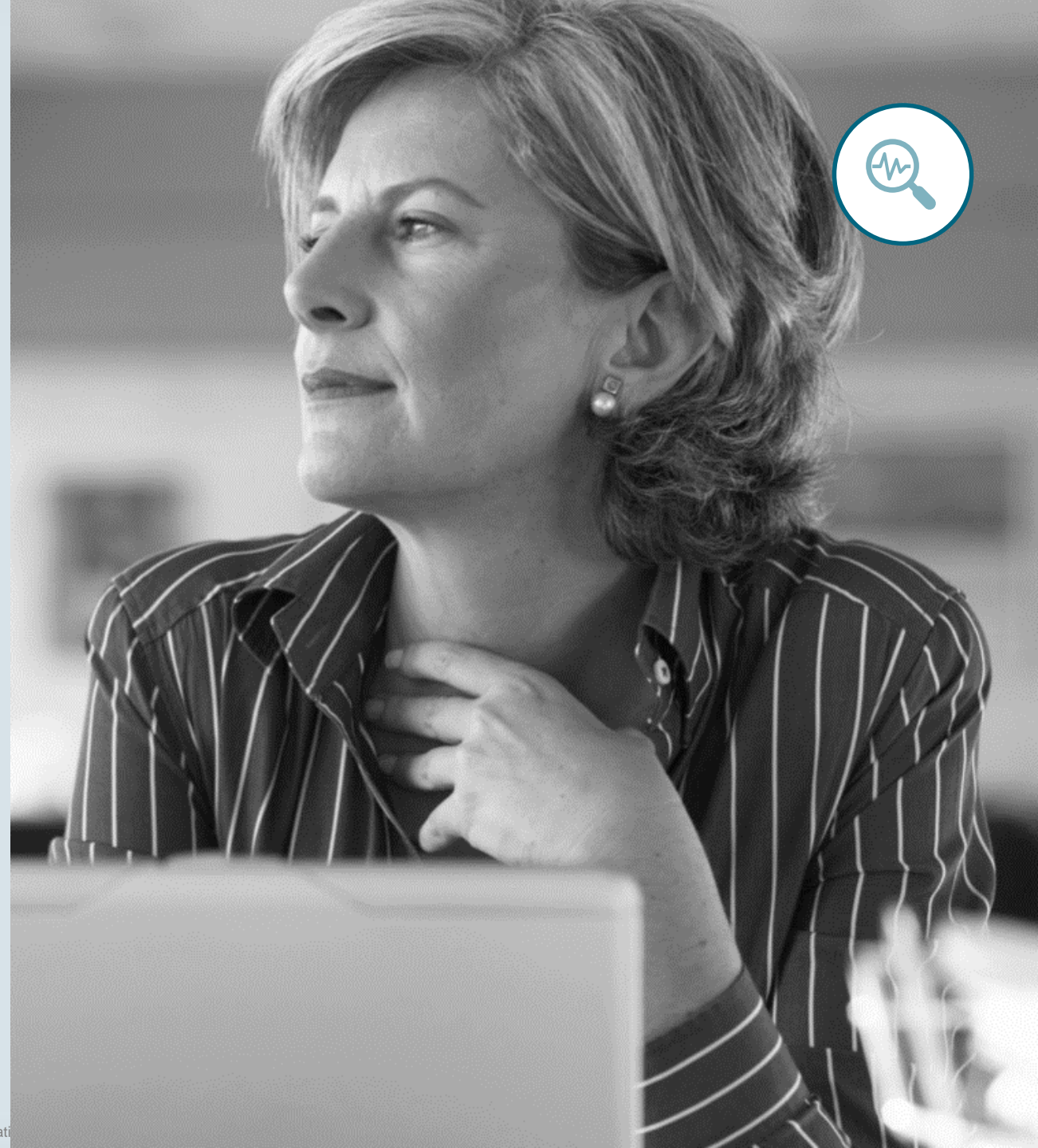
Scale optimally & simplify access



Standardize multi-site workflows



Automate administration



Enabling the future

Real-world data



Leverage real-world data to generate evidence, provide actionable insights and enable continuous learning

Artificial Intelligence



Provide machine learning and artificial intelligence-based decision support tools at the point of care

Patient engagement



Extend workflow solutions to integrate the entire patient care continuum across all care settings

Q&A

Thank you!