



From German to European Leading Specialty Pharma Platform

Company Presentation | April 2025



Every day > 60,000 people are diagnosed with life-threatening diseases globally. At Medios, we are dedicated to timely providing high-quality and efficient treatments to patients with complex diseases.



“We are creating the leading European Specialty Pharma platform to treat diseases optimally with individualized medicine.”

Matthias Gärtner, CEO Medios AG

1 Medios at a Glance

2 Business Model

3 Key Investment Highlights

4 Financials FY 2024

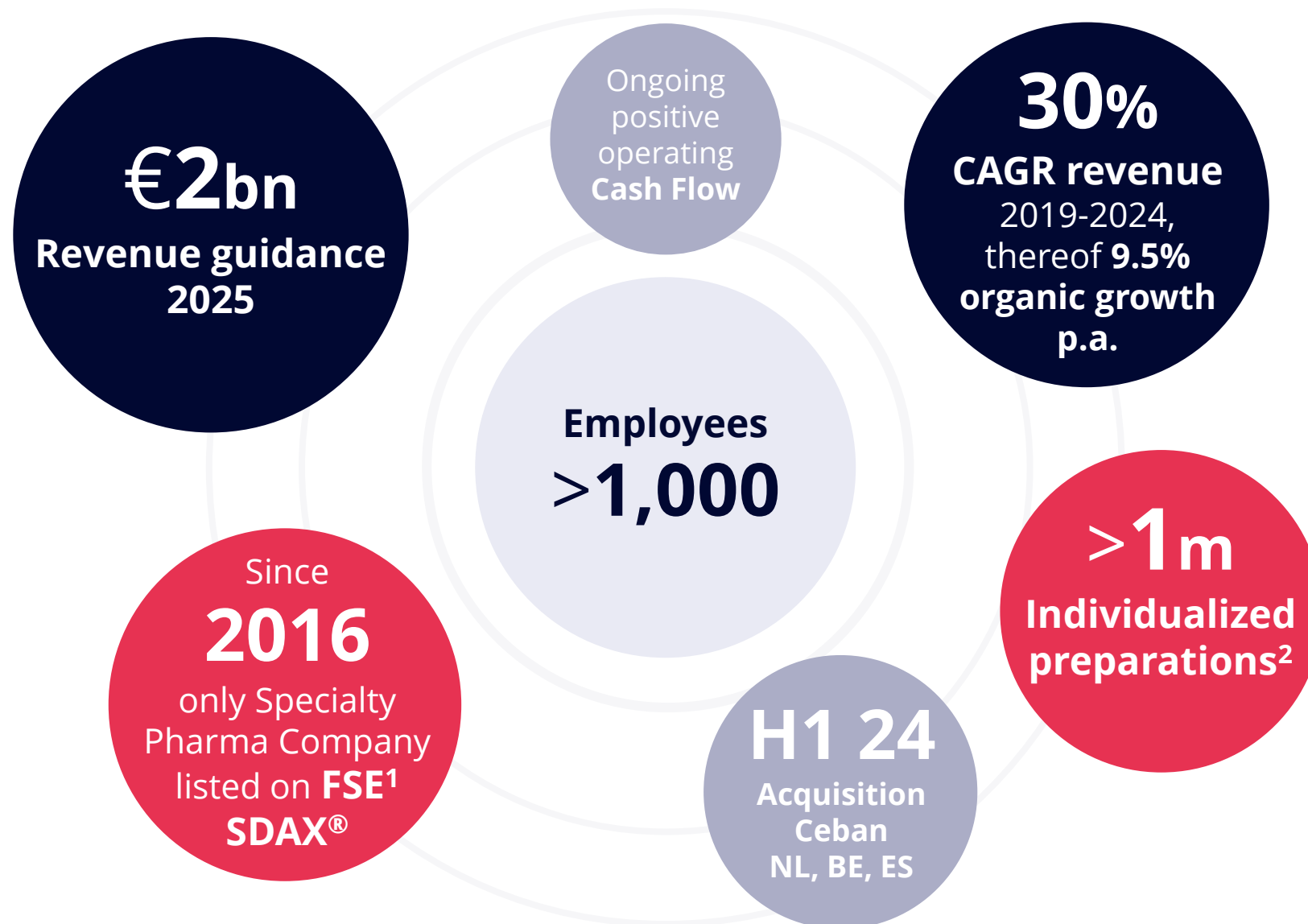
5 Outlook

Appendix



Specialty Pharma: Complex and cost-intensive treatment of life-threatening, chronic or rare diseases e.g. Cancer, Hemophilia, HIV, Hepatitis

A leading position in Specialty Pharma in Europe



Scope of synergistic and well-diversified activities

COMPOUNDING SERVICES

- **Individualized medication compounded** at GMP-compliant facilities for pharmacies, hospitals, clinics, and homecare
- Sterile and nonsterile compounding
- 8 GMP-(compliant) facilities
- By using GMP-(compliant) labs and collaborating with partners enabler for new, personalized treatment options in the field of **Advanced Therapies**

PRESENCE



SEGMENT PST | IB

API SERVICES

- Sourcing, repacking and distributing APIs and excipients to pharmacies and hospitals compounding in-house
- 2 GMP-repacking facilities: one in Belgium and one in Spain

PRESENCE



SEGMENT IB

PHARMACIES

- 24 community pharmacies operating under the **"Medsen"** brand (pharmacy chain)
- 1 hospital pharmacy operating under Ceban Clinic Care

PRESENCE



SEGMENT IB

PHARMACEUTICAL SUPPLY

- Provides finished (specialty) pharma products to own compounding labs, to pharmacies and hospitals
- 3 warehouses: 2 in Germany, 1 in the Netherlands

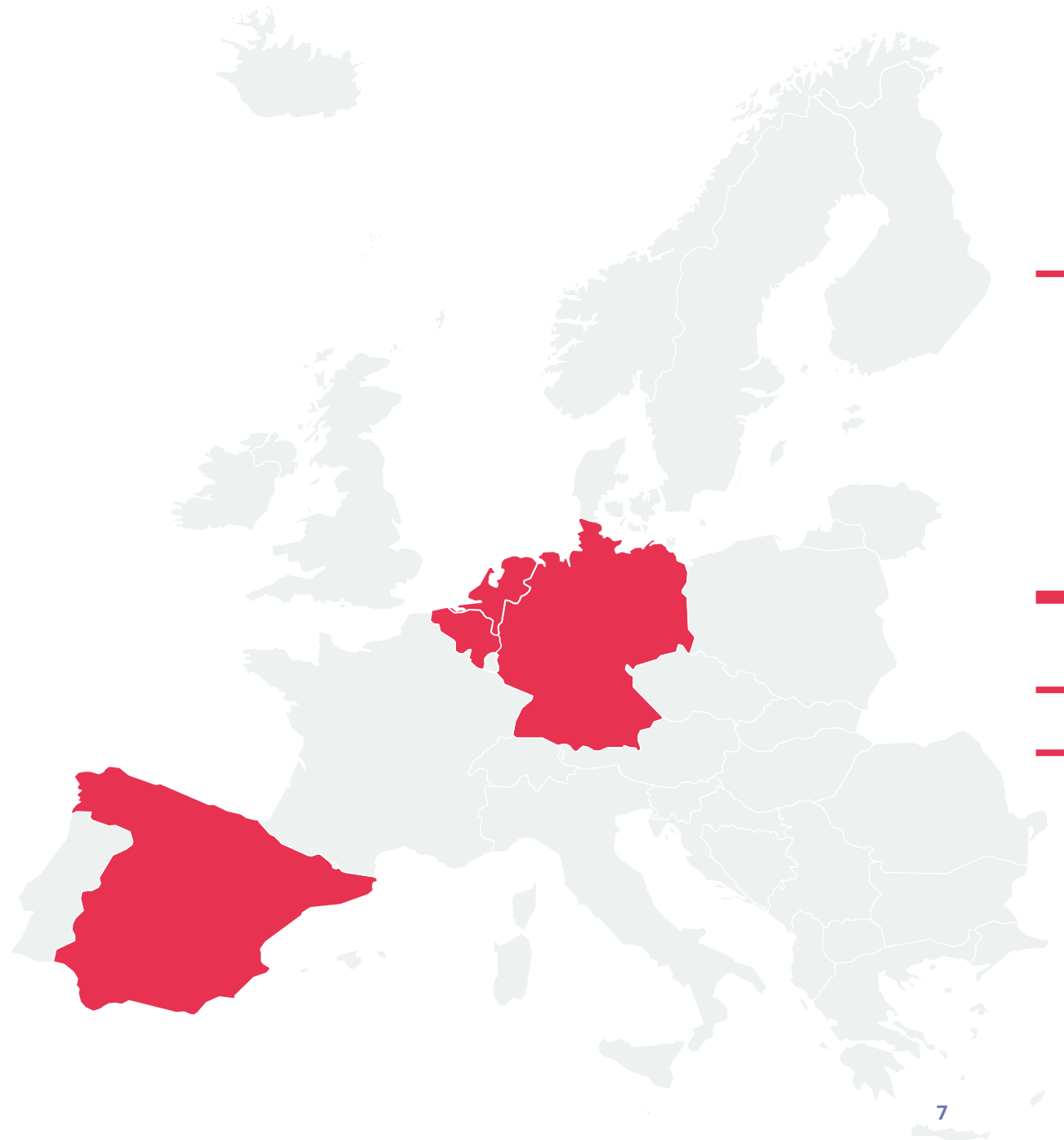
PRESENCE



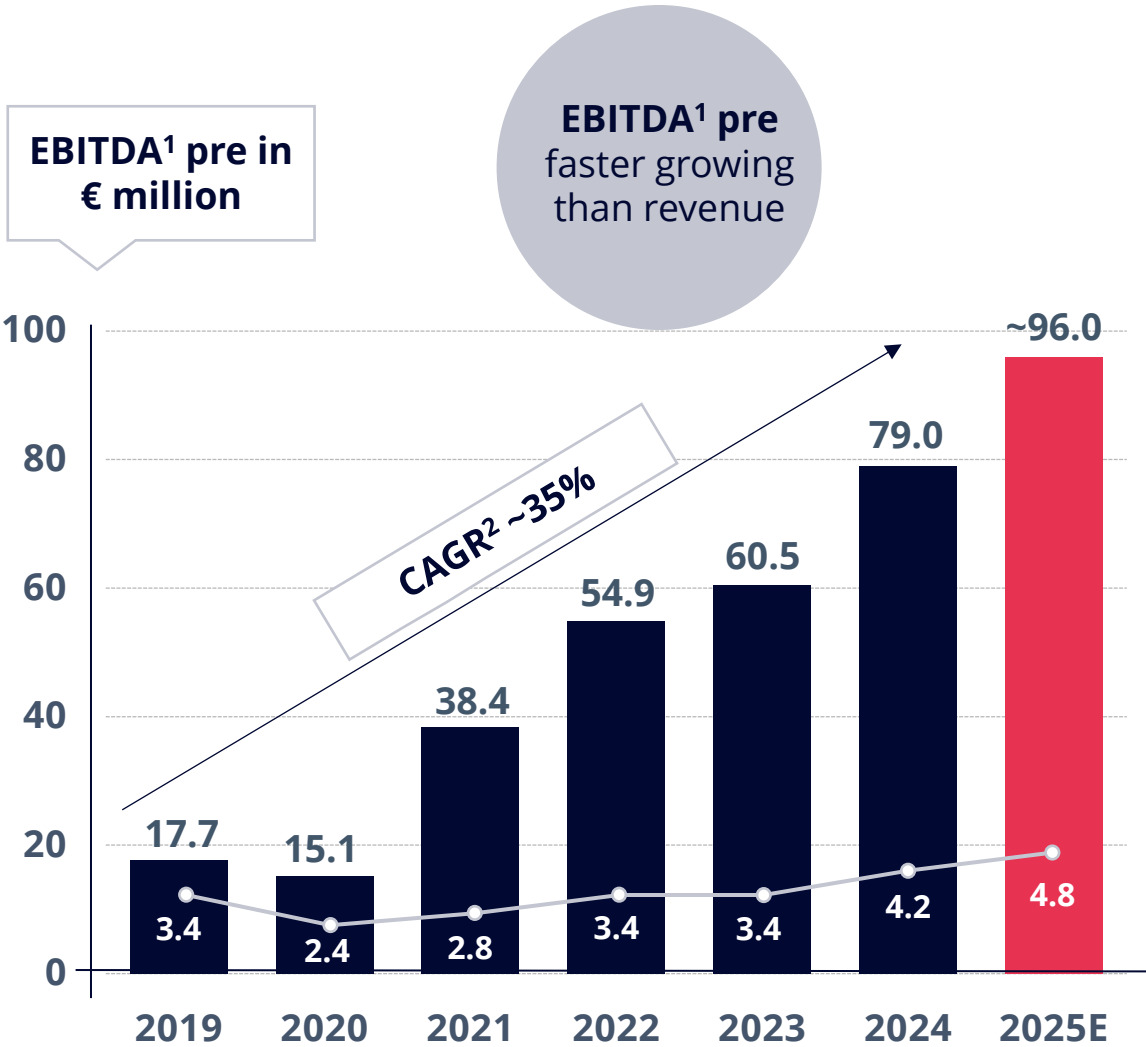
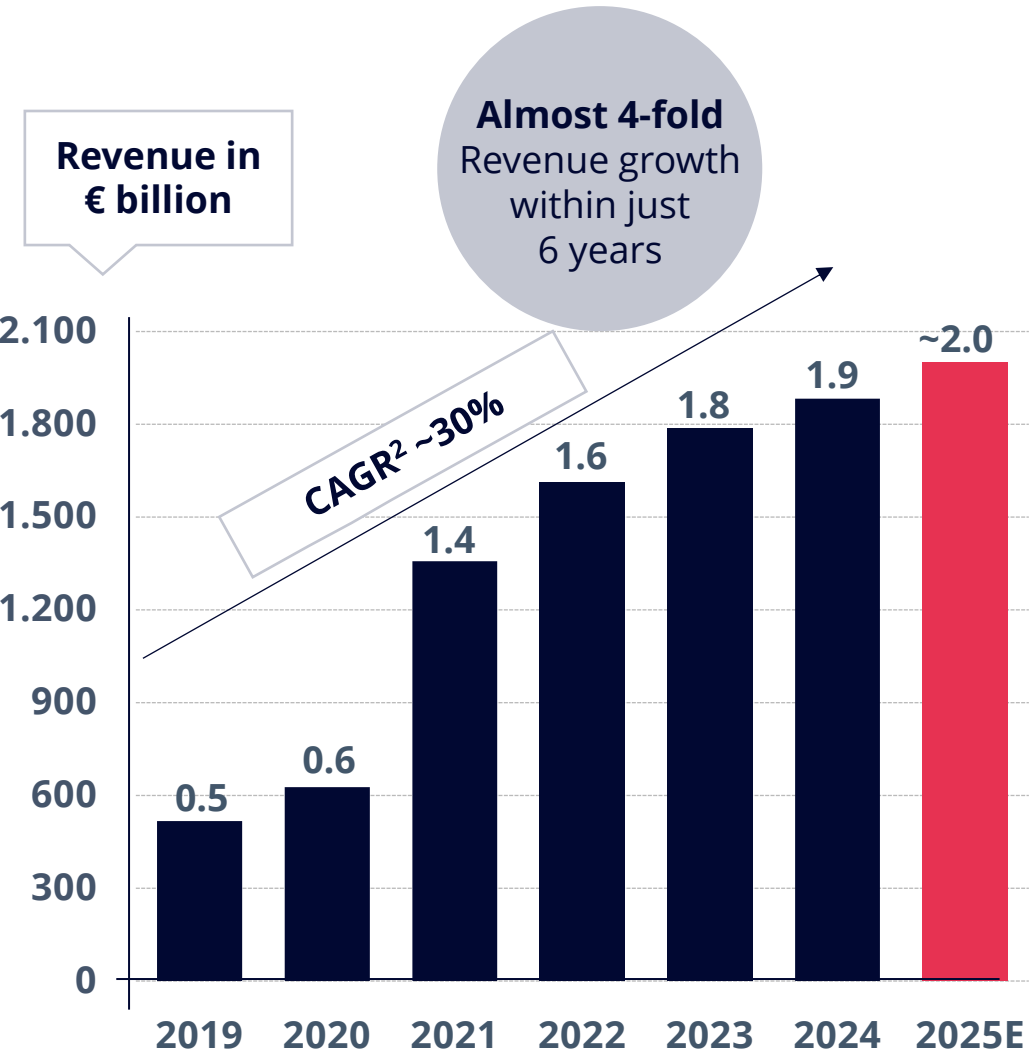
SEGMENT PS | IB

European Compounding Platform

- **Leading position** in Specialty Pharma compounding in Europe following acquisition of Ceban
 - 10 GMP* -(compliant) facilities
 - 8 GMP labs for individualized preparations in Germany and The Netherlands
 - 2 API¹ repackaging facilities in Antwerp, Belgium and Barcelona, Spain
 - 24 owned pharmacies operating under Medsen brand in the Netherlands
 - Around 4,200 partner pharmacies (of which ~940 in Germany) and >200 hospital pharmacies across Europe



Sustainable revenue and EBITDA pre growth 2019 – 2024



MEDIOS

¹ **EBITDA** is defined as consolidated earnings before interest, taxes, depreciation and amortization. **EBITDA pre** is adjusted for special charges for stock options, expenses for M&A activities and for 2023 and 2024 for performance-based payments for the acquisition of compounding volumes as well as from 2024 expenses for ERP-System implementation. I

² Compound Annual Growth Rate

Clear strategy to build the leading European Specialty Pharma Platform

**Strengthening
the Core Business
in Germany**

Continue evolving out
compounding infrastructure
in Germany

**Expansion
in Europe**

Expand compounding
within Europe to gain
continued growth

**Diversification
Advanced
Therapies**

Become a trusted partner
for manufacturing of
advanced therapies



“We highly value Medios as a reliable customer with large Specialty Pharma order volumes.”

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Well diversified set-up with three Segments

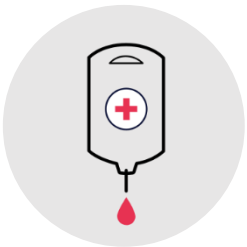
Pharmaceutical
Supply (PS)



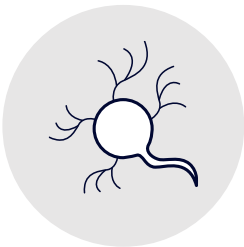
Patient-Specific
Therapies (PST)



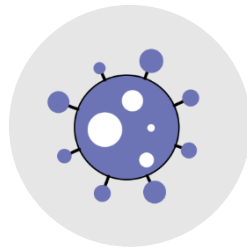
International
Business (IB)



Oncology



Neurology



Autoimmune
Diseases



Ophthalmology



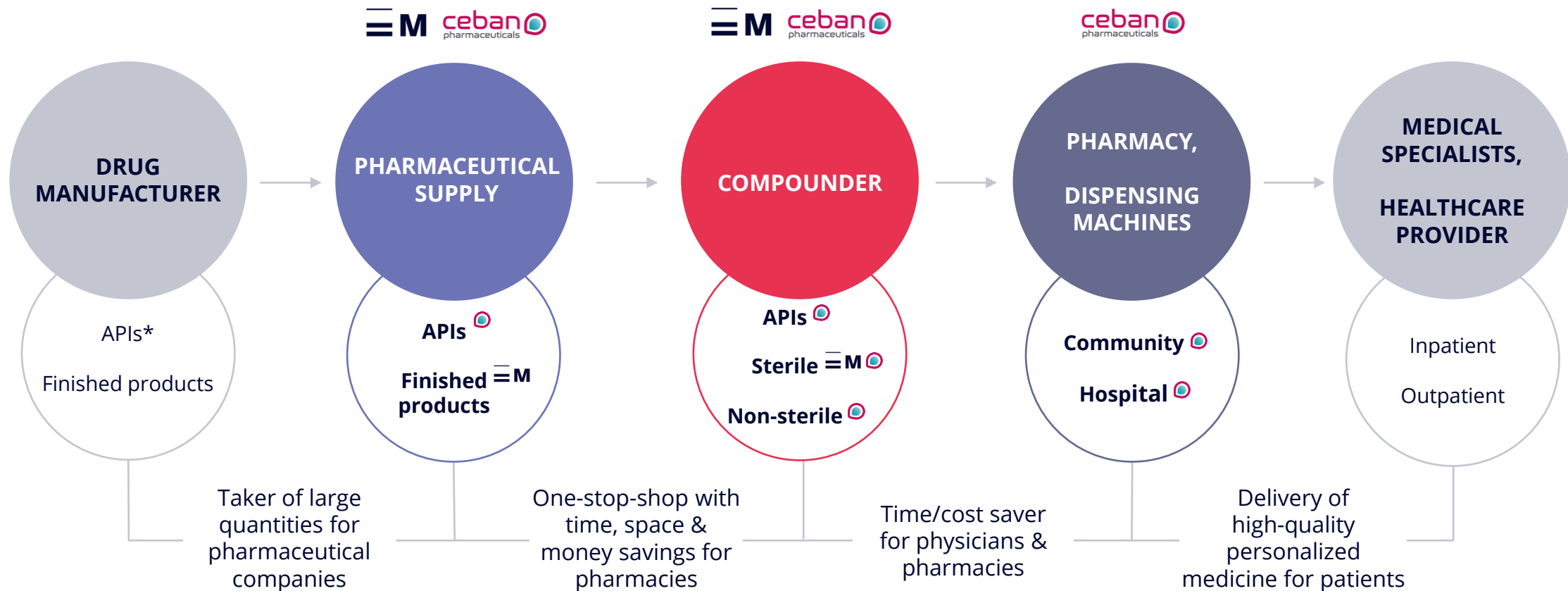
Infectious
Diseases



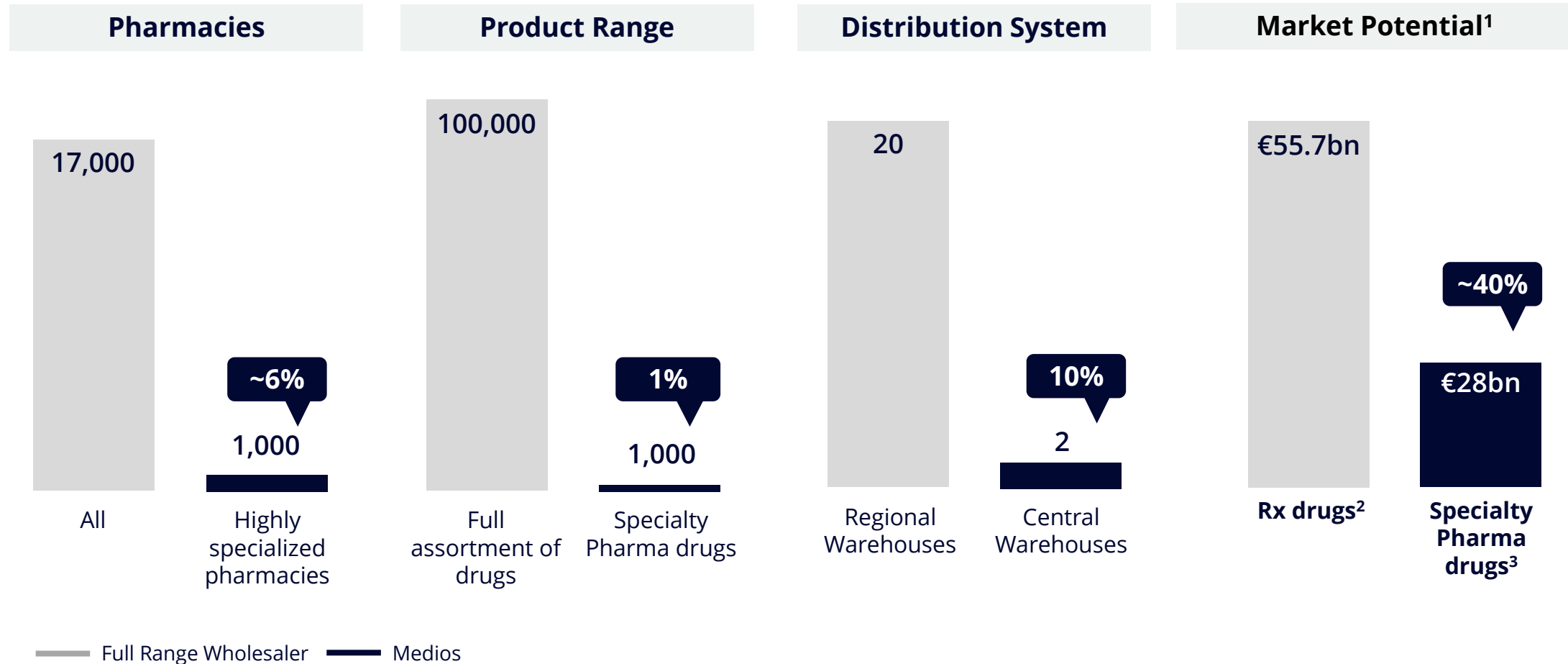
Hemophilia



Medios' position in the simplified pharmaceutical value chain



Highly focused & efficient



A portrait of Dr. Yann Samson, a middle-aged man with short dark hair, smiling. He is wearing a dark suit, a white shirt, and a blue and white striped tie. The background is a light, neutral color.

"I am convinced that close cooperation, knowledge sharing and transparency are key to deliver successfully on our ESG commitments."

Dr. Yann Samson, Chairman of the Supervisory Board
ESG Expert

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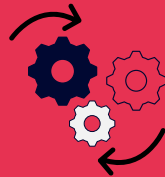
Key Investment Highlights

Compelling Investment Case

A leading position
in Specialty Pharma
compounding in
Europe



Unique business model with
compounding and
supply networks
supported by
digital
platform



**Attractive and
rapidly growing
market** in Europe



Leveraging market
leadership in
Germany to **build
European
Specialty Pharma
platform**



**Culture,
leadership and
sustainability** as
key enablers



**Strong and
profitable
growth** with solid
balance sheet and
cash generation



Low risk business profile

 **As market leader,**
potentially benefitting
from regulatory changes
in the mid to long term

Resilient, low-risk business



Strong position among market players



Wholesale Companies

- Full-line wholesalers (~100,000 products)
- Primarily a logistics partner not a consulting partner
- Mandatory legal inventory range of 14 days
- Intransparent discount structures

Specialized Merchants

- Limited range
- Focus on niche segments and special processes

Manufacturing Companies

- Mainly regional focus
- Primarily manufacturers, not consulting partners
- Limited range

Pharmacies

- ... more than 200 pharmacies with clean room
- No GMP¹ certification
 - Less cost-effective manufacturing

Pharmaceutical Supply

Patient-Specific Therapies

NOWEDA

PHOENIX group

Alliance Healthcare

Sanacorp

omnicare

virion serion

Europarm

≡ M

zyto manufaktur

zyto service

pharmigon

Reinraumlabor Neus

MEDIPOLIS

Niemeyer Apotheke

APOTHEKE am Salzufer

sanitäts haus edenswald-apotheke

Hirsch Apotheke

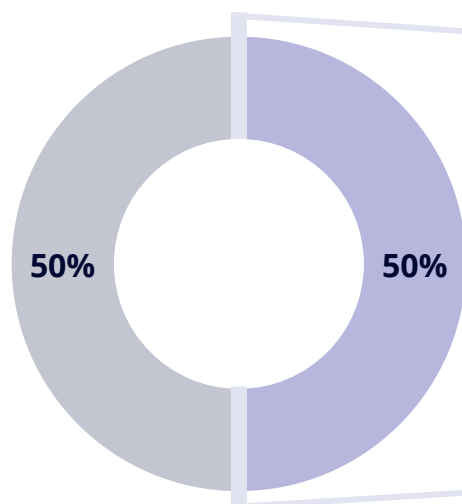
WAAGE APOTHEKE

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Undisputed market leader in Pharmaceutical Supply

Rx Drug Sales

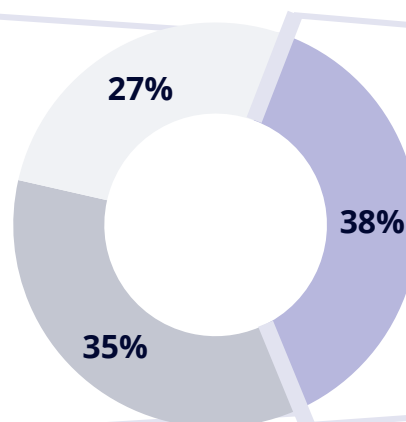
€55.7bn¹



- Specialty Pharma Drugs
- Standard Drugs

Specialty Pharma Drug Sales

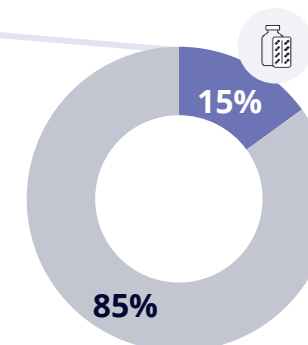
€27.9bn²



- Specialty Pharma Wholesalers
- Direct Sales to Pharmacies from Pharmaceutical Companies
- General Wholesalers

Specialty Pharma Wholesale Market

€10.6bn



- MEDIOS**
- Other

Key Investment Highlights

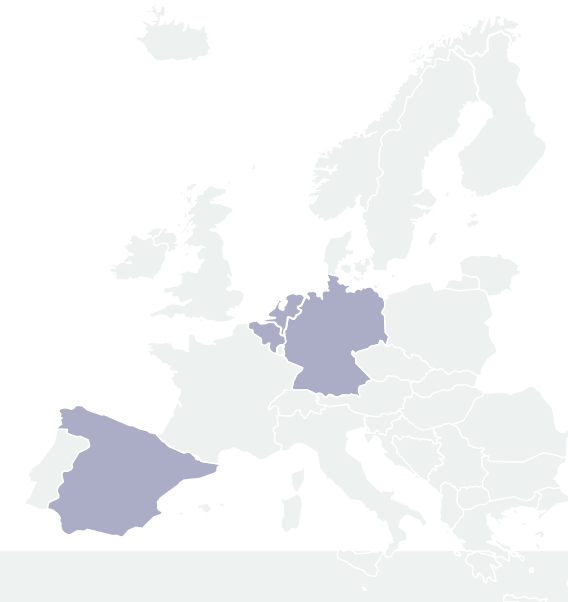
Compounding Services

- **Market leader in Compounding Services**
 - Complete non-sterile offering
 - Expanding sterile offering
 - Highly innovative – quick go-to-market
- **Unique business model, characterised by:**
 - Covering the full-value chain – anticipation on developments
 - Supply chain security & strong logistics
 - Robust product development capabilities
- **Well-positioned to benefit from the outsourcing trend**

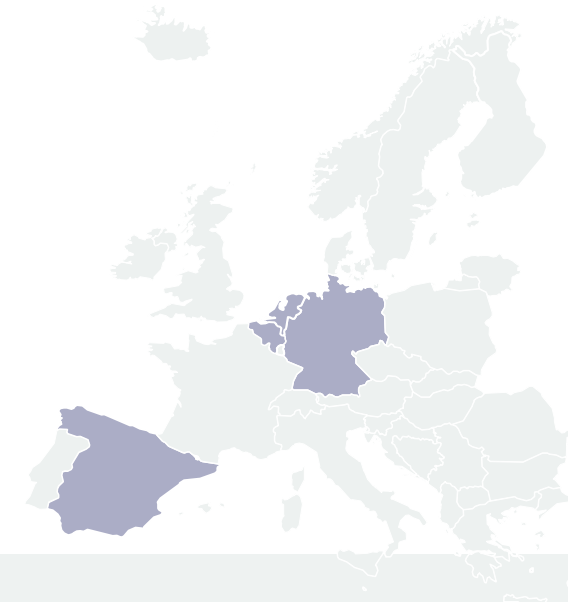
Oostrum Compounding Site		Breda Compounding Site	
Facility size	2,000 sqm	Facility size	3,000 sqm
Workforce	72	Workforce	81
Clean rooms	30	Clean rooms	22
Capacity (in use)	25-30%	Capacity (in use)	70%

Growth drivers

- ✓ Favourable regulatory environment, allowing for sterile and non-sterile outsourcing
 - Strong and developed non-sterile market
 - Rapidly growing sterile market
- ✓ Healthcare providers focusing on core activities, fuelling demand for outsourcing
- ✓ Regulation imposing increasingly strict quality & safety requirements while reducing costs
- ✓ Collaboration with hospitals and growth of clinics driving strong growth in sterile market
- ✓ Valuable insights - Medsen pharmacies and API Services



API-Services and Compounding Services



API Services

- Leading player in APIs for pharmacies and hospitals compounding in-house in Belgium and Spain
 - Complete offering of APIs and related products
 - Customers in 7 European countries
 - Product offer expanded following shortages/discontinuations
- Well-positioned to benefit from demographics, drug shortages and drug discontinuations

Compounding Services

- Starting in Q4-24 with Compounding Services
 - State-of-the-art new facility in Wilrijk (Belgium)
 - Approvals received from authorities to start with compounding (sterile and non-sterile)

Growth drivers

- ✓ Accessibility
 - Drug shortages and discontinuations
 - Supply chain disruptions
- ✓ Personalization – need for tailor-made medicines
 - Dose and/or format alteration
 - Combination therapies
- ✓ Demographics – ageing population, ...
- ✓ Favorable regulation towards outsourcing of compounding (regulatory changes in 2019 and 2021)
- ✓ Increased regulation for hospital compounding requires substantial investments, driving outsourcing
- ✓ Liberalization results in slowly increasing outsourcing levels, fueling compounding market growth

Benefitting from the megatrends

Ageing population

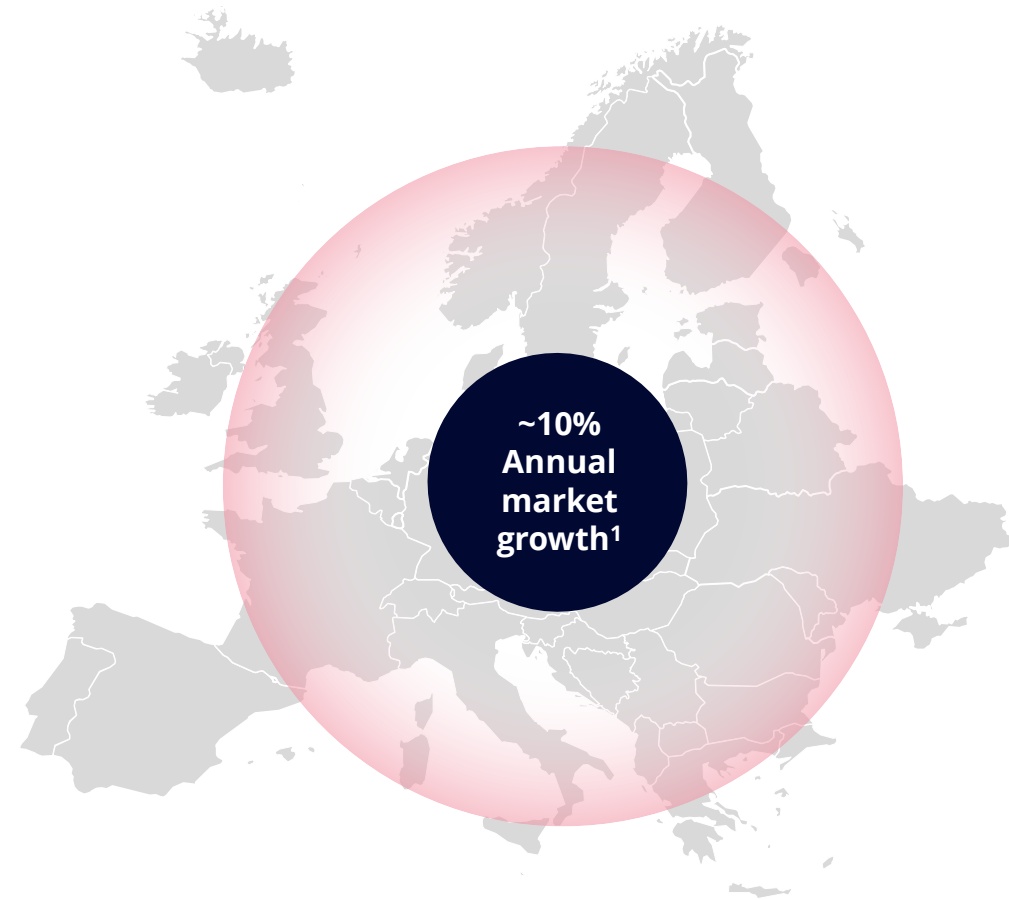
Rising prevalence of chronic disease

Individualization

New patient-tailored therapies

Focus on quality and efficiency

Increasing rate of outsourcing to GMP² facilities



Specialty Pharma growing faster than the pharma market

Revenue of Pharmacies in Germany in 2023

€66.4bn

+3.4% yoy

Total revenue¹

thereof

€55.7bn

+3.6% yoy

Rx drugs revenue¹

thereof

€27.9bn

+6.5% yoy

Specialty Pharma
drugs revenue²

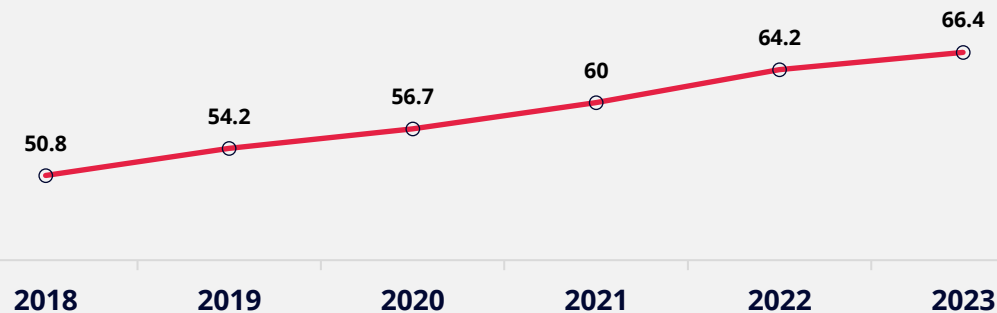
thereof

~€2.0b

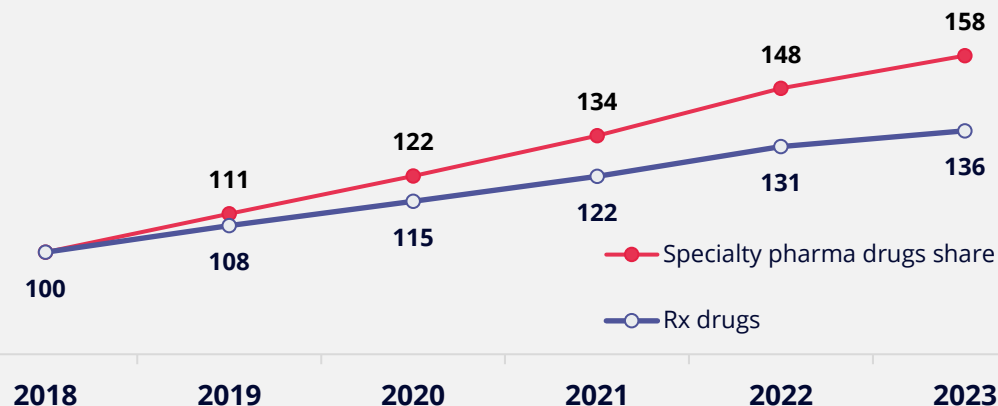
~7.0%

Medios market
share³

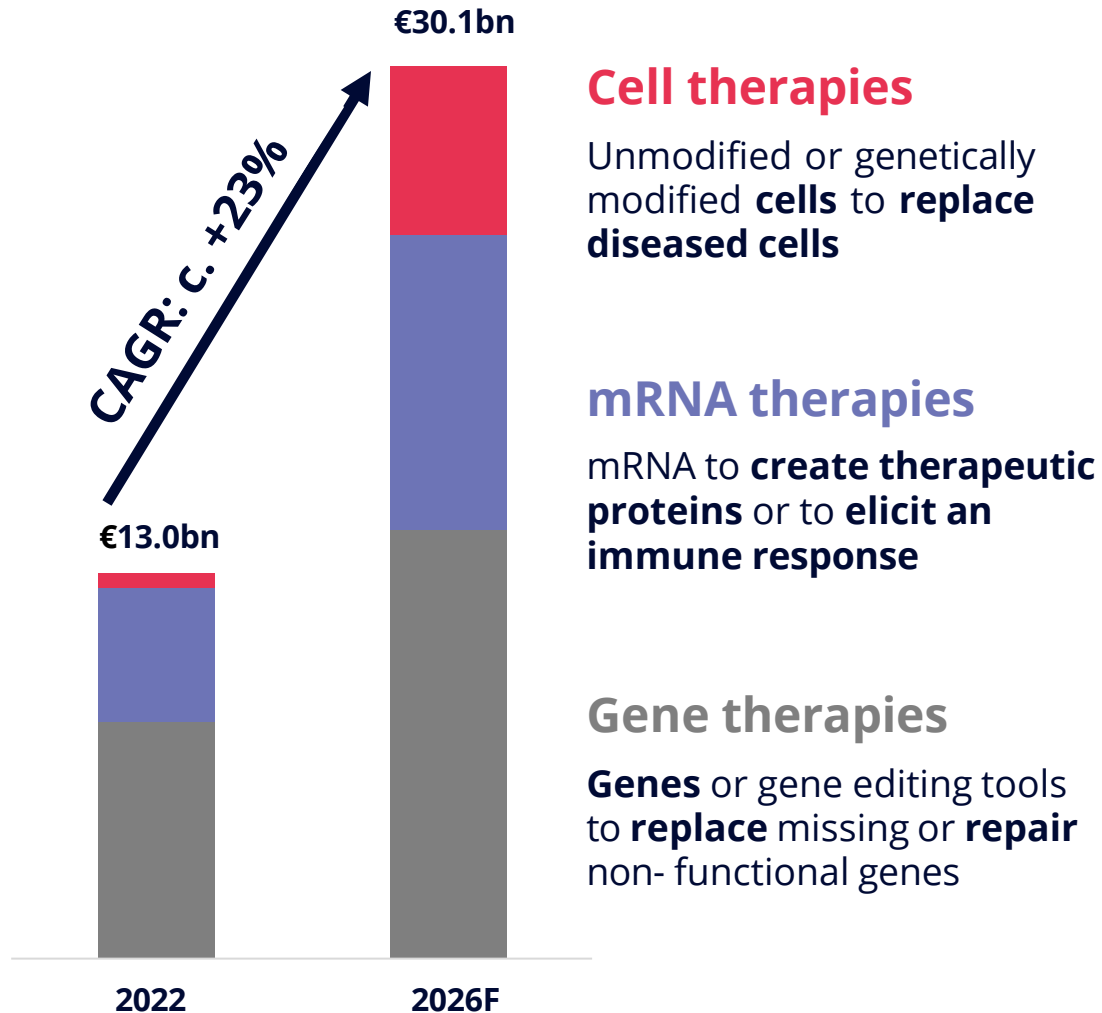
Pharmacies revenue in Germany (in € bn)¹



Revenue Specialty Pharma drugs² vs. Revenue all RX drugs¹ in Germany (indexed, in %)



Global advanced therapeutics market*



Leveraging market leadership

Advanced Therapies will revolutionize patient care – Medios' platform is an enabler

Expert in patient-specific **GMP¹**
manufacture of therapies in **smallest batches**

Comprehensive **network** of **pharmacies** and **logistics** for **personalized medicine**

ESG embedded in management

Comprehensive “**ESG strategy 2025**”
as part of Corporate strategy

ESG Committees: Responsibility at all levels

- Sustainability Committee: Chaired by CEO
- Chair of the ESG Committee: Chairman of the SB

High Transparency through:

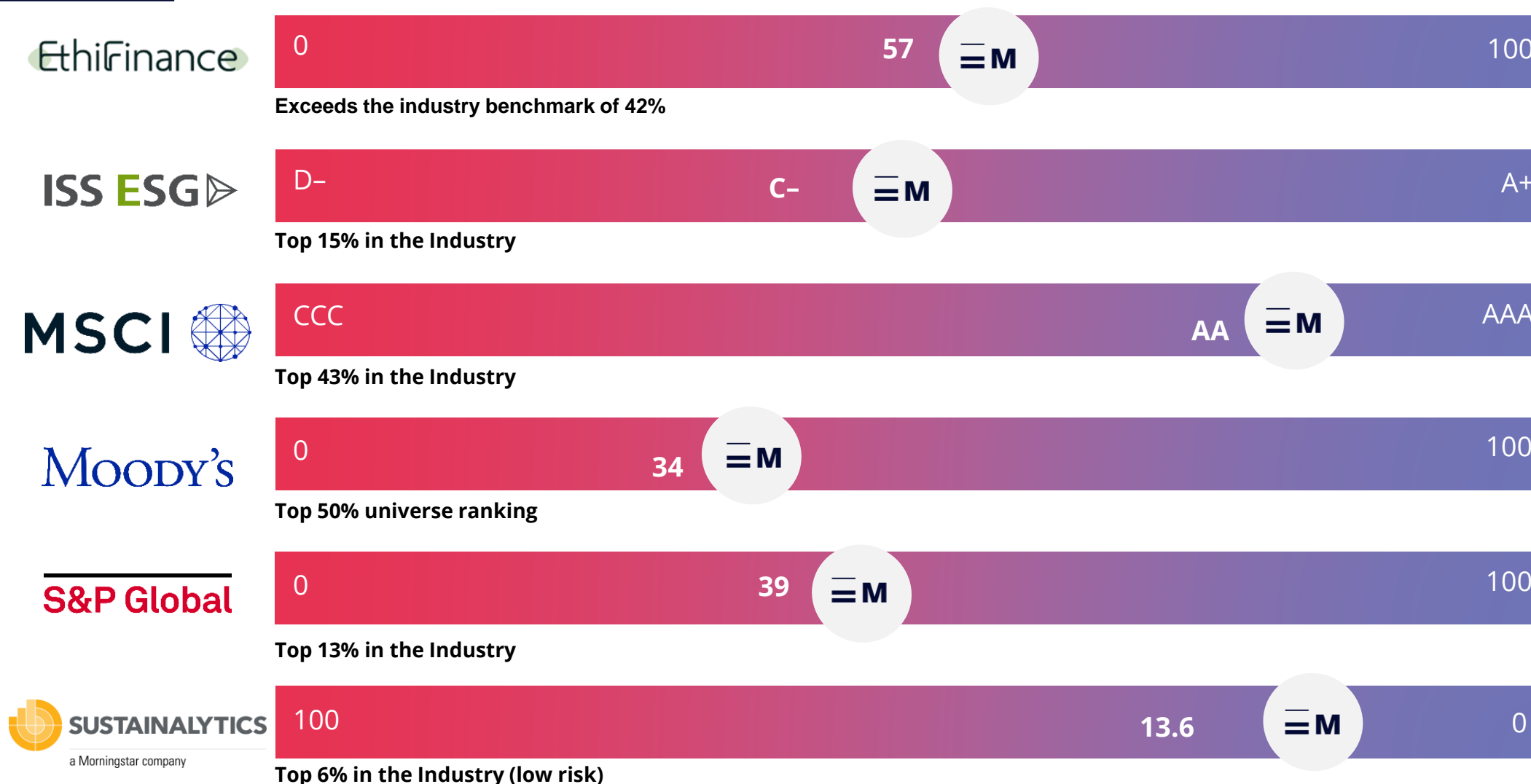
- Voluntary Annual Nonfinancial Reports until 2023, starting in 2024, mandatory reporting that fully complies with new European standards (CSRD¹ and ESRS²), highly increasing transparency



**Culture, leadership and
sustainability as key enablers**

Key Investment Highlights

Average to above-average ESG Ratings





"I am passionate about working for Medios because patient care is at the center of what we do."

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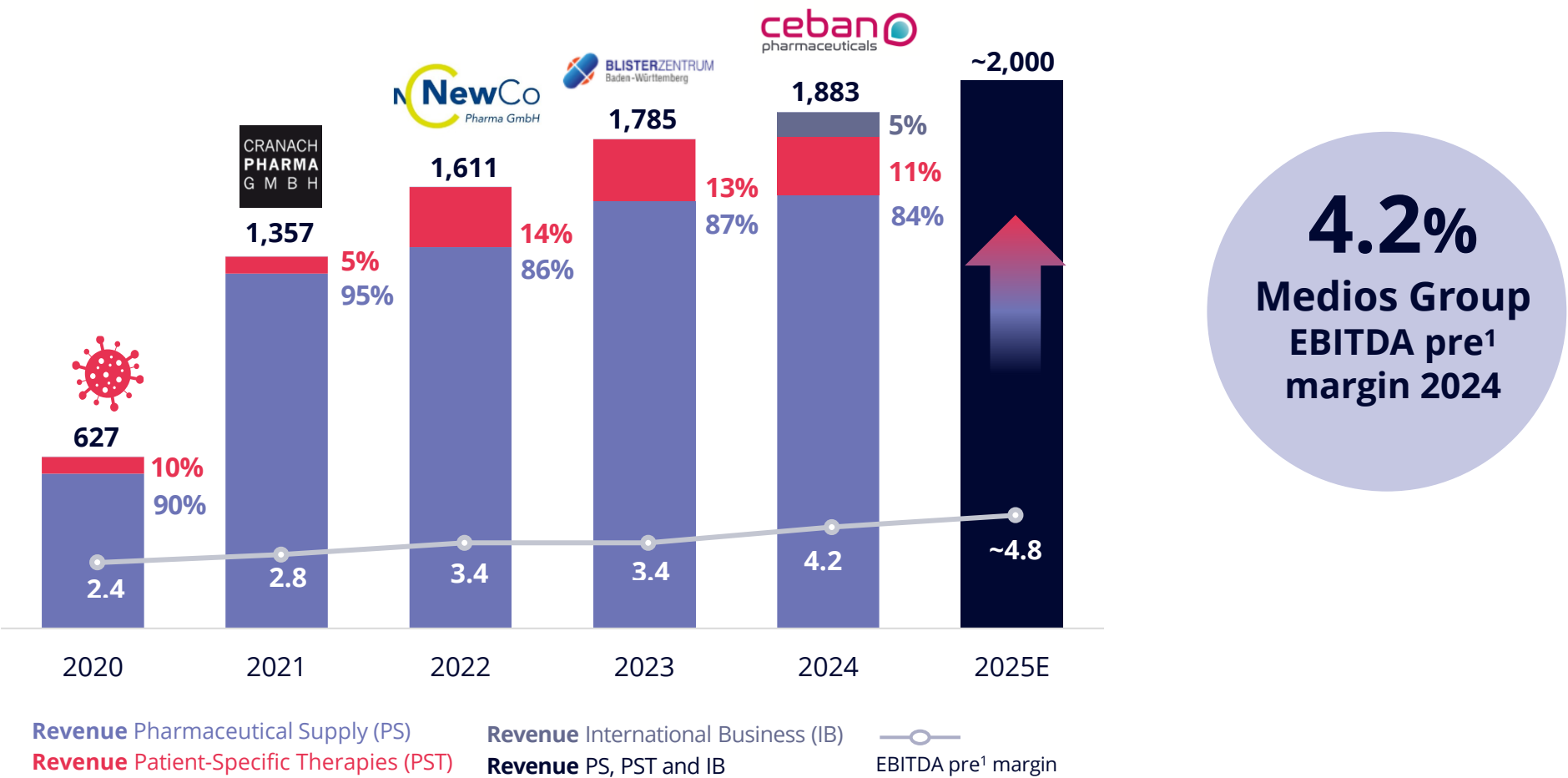
Appendix

FY 2024 - Strong PS & IB (7 months); turnaround of PST in the course of 2025

	Pharmaceutical Supply 'PS'		Patient-specific Therapies 'PST'		International Business 'IB'		Internal Services		IFRS consolidation		Group	
YoY in € million	FY 24	FY 23	FY 24	FY 23	FY 24	FY 23	FY 24	FY 23	FY 24	FY 23	FY 24	FY 23
Total segment revenue delta (yoy in %)	1,720 1.4%	1,696	228.2 -11%	256.4	88.8	n/a	11.3 27.5%	8.8	-166.0 -6.2%	-176.9	1,883.0 5.5%	1,784.7
Revenue – external delta (yoy in %)	1,580 1.4%	1,558	213.6 -5.4%	226.0	88.8	n/a	0.6 5.0%	0.6	n/a	n/a	1,883.0 5.5%	1,784.7
EBITDA pre ¹	50.0	46.6	23.2	21.8	16.3	n/a	-10.6	-8.0	n/a	n/a	79.0	60.5
margin (% of revenue – total)	2.9%	2.8%	10.2%	8.5%	18.3%		-93.6%	-90.0%			4.2%	3.4%
margin (% of revenue external)	3.2%	3.0%	10.9%	9.7%	18.3%		<-100%	<-100%			4.2%	3.4%

Ongoing growth and significant EBITDA pre margin increase

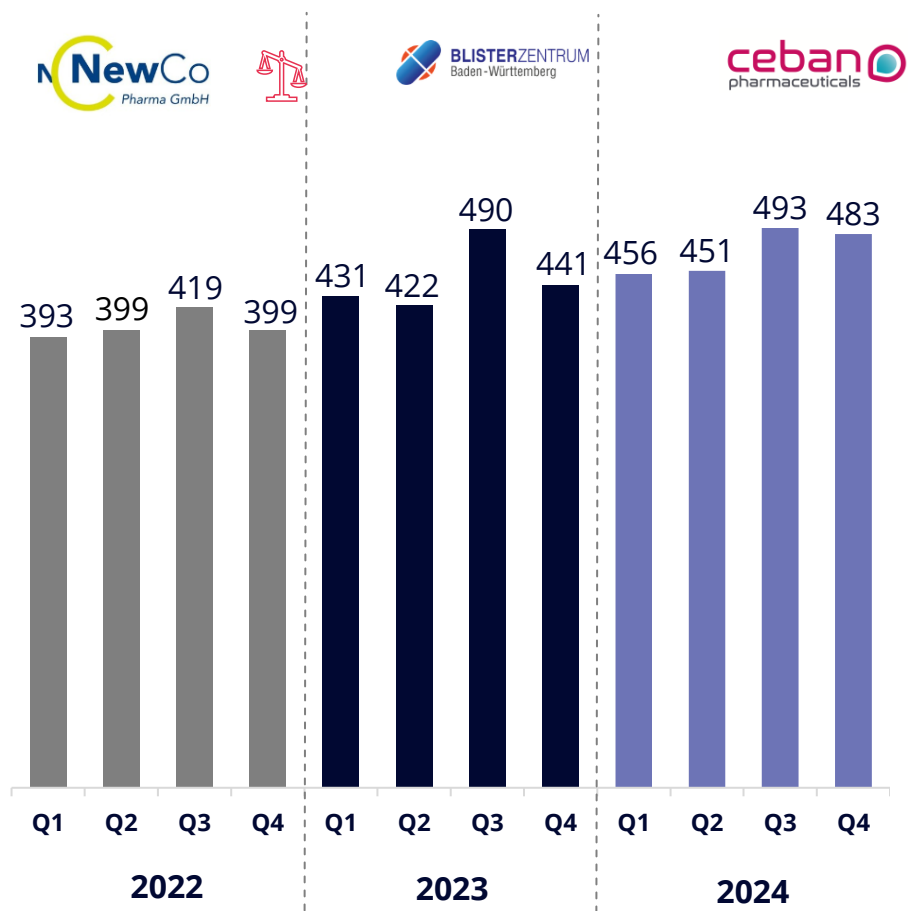
Segment revenue, EBITDA pre¹ margin (in €m, %)



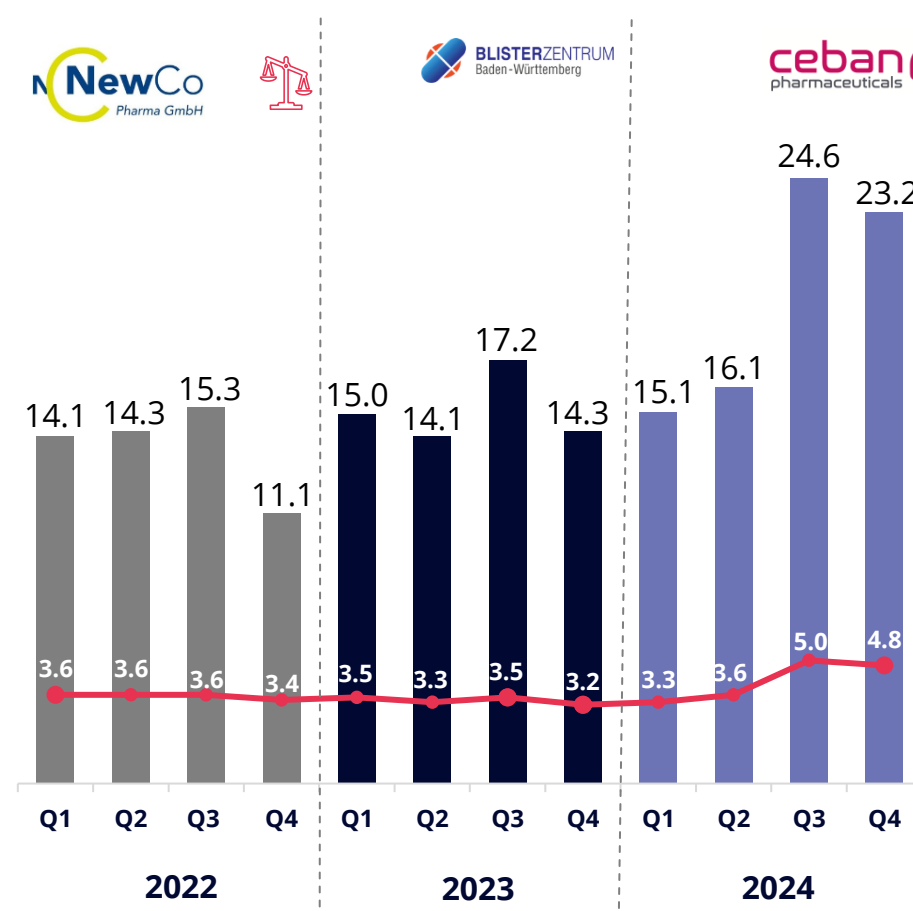
¹ EBITDA pre is adjusted for special charges for stock options, expenses for M&A activities and for performance-based payments for the acquisition of compounding volumes

QoQ – Strong EBITDA pre margins in the second half of 2025

Revenue (€m)



EBITDA pre¹ €m



¹ EBITDA is defined as consolidated earnings before interest, taxes, depreciation and amortization. EBITDA pre is adjusted for special charges for stock options, expenses for M&A activities and for 2023 and 2024 for performance-based payments for the acquisition of compounding volumes as well as from 2024 expenses for ERP-System implementation.

FY 2024 – Good Group financials and strong operating CF

In € million	FY 2024	FY 2023	Δ in %
Revenue	1,883.0	1,784.7	5.5%
Gross profit¹	154.6	112.0	38.0%
<i>gross margin in %</i>	8.2%	6.3%	30.2%
EBITDA pre²	79.0	60.5	30.5%
<i>margin in %</i>	4.2%	3.4%	23.5%
Conversion rate in % (EBITDA pre/gross profit)	51.1%	54.0%	-5.4%
EBIT	31.7	31.4	0.9%
EPS (€), undiluted	0.51	0.79	-35.8%
CF from operating activities	73.7	16.4	>100.0%
CF from investing activities	-222.3	-16.6	>100.0%
CF from financing activities	183.8	-8.0	>100.0%
Free cash flow³ (before M&A)	67.4	15.1	>100.0%
	31 Dec 2024	31 Dec 2023	Δ in %
Inventories	92.4	59.3	55.8%
Cash & cash equivalents	106.0	71.0	49.2%
Equity	510.2	468.8	8.8%
<i>ratio in %</i>	54.6%	78.8%	-30.7%
Liabilities	424.2	125.9	>100.0%
<i>ratio in %</i>	45.4%	21.2%	>100.0%

Comments

Financials including the strong contribution of **Ceban (segment International Business “IB”)** for seven months

- **Revenue growth of 5.5%** mainly driven by IB for seven months and to a lower extent by PS (+1.4%)
- **Gross profit** increased by +38% mainly due to IB and PS; PST decreased due to deconsolidation of Koelsche Blister in June 2023, regulatory headwinds, and higher performance-based payments for additional compounding orders
- **EBITDA pre** rose by 30.5% driven by contribution of IB and supported by PS and the turnaround of **PST** especially in H2
- **Operating cashflow more than doubled** €73.7m driven by higher operating result and reporting-date-related positive effects
- **Investing CF** of -€222.3m mainly resulting from payments for the Ceban acquisition
- **Financing CF** of €183.8m reflects bridge loan for the Ceban acquisition (€200m) in H1 that was replaced by a long-term loan (€125m) and a RCF (€75m); cash outflows resulted from interest (-€10.0m) and lease payments (-€4.3m) and the repayment of an operating loan (-€1.1m)
- **Cash & cash equivalents** consisted mainly of unrestricted bank deposits

¹ **Gross profit** = Revenue - Cost of materials | ²**EBITDA** is defined as consolidated earnings before interest, taxes, depreciation and amortization. **EBITDA pre** is adjusted for special charges for stock options, expenses for M&A activities and for 2023 and 2024 for performance-based payments for the acquisition of compounding volumes as well as from 2024 expenses for ERP-System implementation. | ³ Calculated as follows: Operating CF less CAPEX

Status Debt-Financing

- **New financing structure** concluded in Nov 2024 : **€225m**, thereof
 - €125m as **term loan**, term: 5 yrs, repayment will start in March 2025, and
 - €100m as **Revolving credit facility (RCF)**, term 5 (+1 +1) yrs plus
 - RCF step up option of **further €50m**
 - Attractive **interest rate** agreed
- **Net debt** of approx. €130m on 31 Dec 2024
 - Includes **fully drawn bridge loan (€125m)** and **RCF (€75m)**
- **Estimated future free cash flow after interest payments** (c. €30m - €40m) available for redemption of credit facility starting as of March 2025





“Medios delivers the best quality – reliably, competently and fast. These are key criteria for the optimal care of our patients.”

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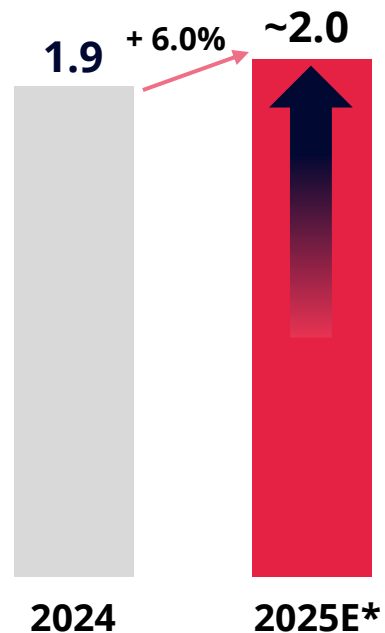
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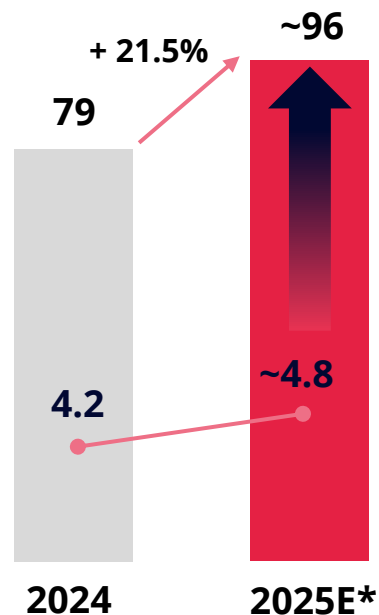
Guidance 2025 & growth story

Disproportionate EBITDA pre increase expected

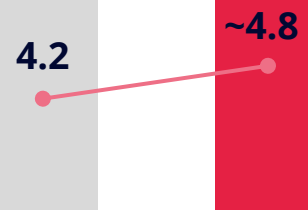
Revenue (€bn)



EBITDA pre¹(€m)



Margin (%)





**Thank you very much
for your attention!**



“I work for Medios because I can contribute to patient care that meets the highest quality standards.”

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Synergistic positions across the compounding value chain

	Compounding Services	API Services	Pharmacies
Description	<ul style="list-style-type: none"> Tailor-made medication compounded at GMP-compliant facilities for pharmacies, hospitals, clinics, and homecare Compounding facilities: <ul style="list-style-type: none"> Breda, NL: Sterile and non-sterile compounding Oostrum, NL: Sterile compounding Wilrijk, BE: Non-sterile and sterile compounding 	<ul style="list-style-type: none"> Sourcing, repacking and distributing APIs and excipients to pharmacies and hospitals compounding in-house Repacking facilities: <ul style="list-style-type: none"> Wilrijk, BE Barcelona, ES 	<ul style="list-style-type: none"> 24 owned pharmacies across the Netherlands under the "Medsen" chain Automated digital services, including 24h dispensing machines
Revenue breakdown	~45%	~15%	~40%
Presence	Netherlands, Belgium	Belgium, Spain	Netherlands
Synergies with Compounding Services		<ul style="list-style-type: none"> ✓ Timely access to APIs ✓ Strong supply chain ✓ In-depth relationships with pharmacies, hospitals and clinics ✓ Starting point for Compounding Services 	<ul style="list-style-type: none"> ✓ Providing insight in market demand and dynamics ✓ Negotiation power over wholesalers ✓ Access to other pharmacies through sale of dispensing machines ✓ Flexibility in distribution



Repacking of APIs, Belgium



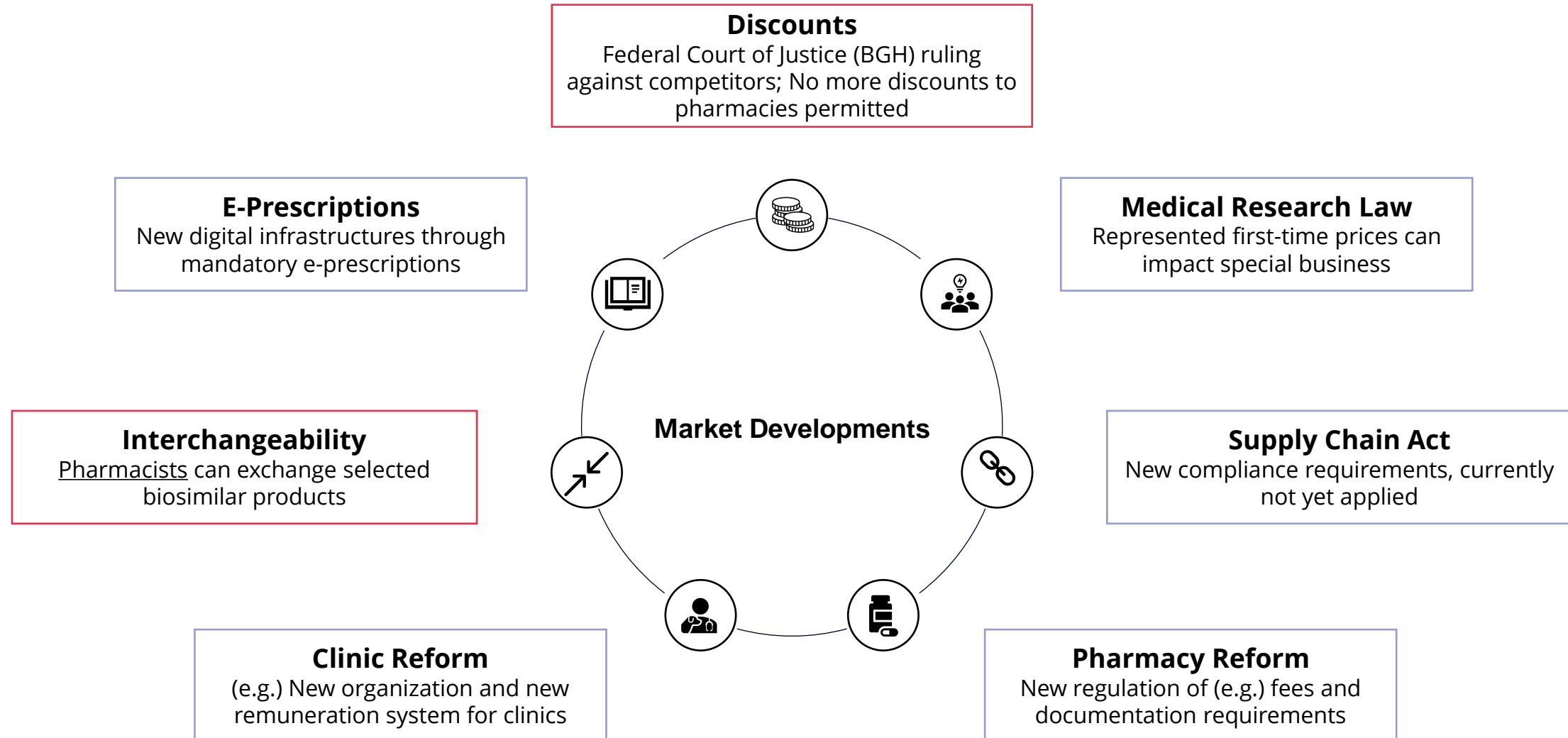
Capsule filling, the Netherlands

← Accretive services to core compounding business

Transformative and value enhancing acquisition

Internationalization	<ul style="list-style-type: none">• First step in Medios internationalization• Immediate market entry into three European countries: NL, BE, ES• A leading position in compounding in Northwestern Europe
European Platform	<ul style="list-style-type: none">• First building block to establish the leading European compounding platform• One-stop-shop on international scale• Improve healthcare and maintain accessibility for patients across Europe
Product diversification	<ul style="list-style-type: none">• Expanding the value chain through 23 own pharmacies in NL• Entry into high-margin segment of APIs• Also covering high-margin non-sterile business
Substantial synergies	<ul style="list-style-type: none">• Significant international cross-selling opportunities across borders for API• International sourcing expertise to fight drug shortages
Attractive purchase price	<ul style="list-style-type: none">• Purchase price comprises a cash component of €235.3m and 1.7m Medios shares (~€23.9m*):• Only small portion of equity-linked financing• Attractive multiple• Immediately accretive to EBITDA pre and EBITDA pre margin

Regulatory developments Germany



Q4 2024 – Disproportionate EBITDA pre increase with great margin

	Pharmaceutical Supply 'PS'		Patient-specific Therapies 'PST'		International Business 'IB'		Internal Services		IFRS consolidation		Group	
YoY in € million	Q4 24	Q4 23	Q4 24	Q4 23	Q4 24	Q4 23	Q4 24	Q4 23	Q4 24	Q4 23	Q4 24	Q4 23
Total segment revenue delta (yoy in %)	423.0 -0.3%	424.5	55.5 0.8%	55.1	41.5	n/a	2.8 30.0%	2.2	-40.4 -0.4%	-40.6	482.5 9.3%	441.2
Revenue – external delta (yoy in %)	388.7 -0.3%	390.1	52.0 2.1%	51.0	41.5	n/a	0.2 >100%	0.1	n/a	n/a	482.5 9.3%	441.2
EBITDA pre¹	13.0	13.0	6.5	4.0	6.5	n/a	-2.8	-2.7	n/a	n/a	23.2	14.3
margin (% of revenue – total)	3.1%	3.1%	11.8%	7.3%	15.7%	n/a	-98.1%	<-100%			4.8%	3.2%
margin (% of revenue external)	3.3%	3.3%	12.5%	7.8%	15.7%	n/a	<-100%	<-100%			4.8%	3.2%

FY 2024 - Strong PS & IB (7 months); turnaround of PST in the course of 2025

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YoY in € million	FY 24	FY 23	FY 24	FY 23	FY 24	FY 23	FY 24	FY 23	FY 24	FY 23	FY 24	FY 23
Total segment revenue delta (yoy in %)	1,720 1.4%	1,696	228.2 -11%	256.4	88.8	n/a	11.3 27.5%	8.8	-166.0 -6.2%	-176.9	1,883.0 5.5%	1,784.7
Revenue – external delta (yoy in %)	1,580 1.4%	1,558	213.6 -5.4%	226.0	88.8	n/a	0.6 5.0%	0.6	n/a	n/a	1,883.0 5.5%	1,784.7
EBITDA pre ¹	50.0	46.6	23.2	21.8	16.3	n/a	-10.6	-8.0	n/a	n/a	79.0	60.5
margin (% of revenue – total)	2.9%	2.8%	10.2%	8.5%	18.3%		-93.6%	-90.0%			4.2%	3.4%
margin (% of revenue external)	3.2%	3.0%	10.9%	9.7%	18.3%		<-100%	<-100%			4.2%	3.4%

Appendix

The Medios share

Basic Information

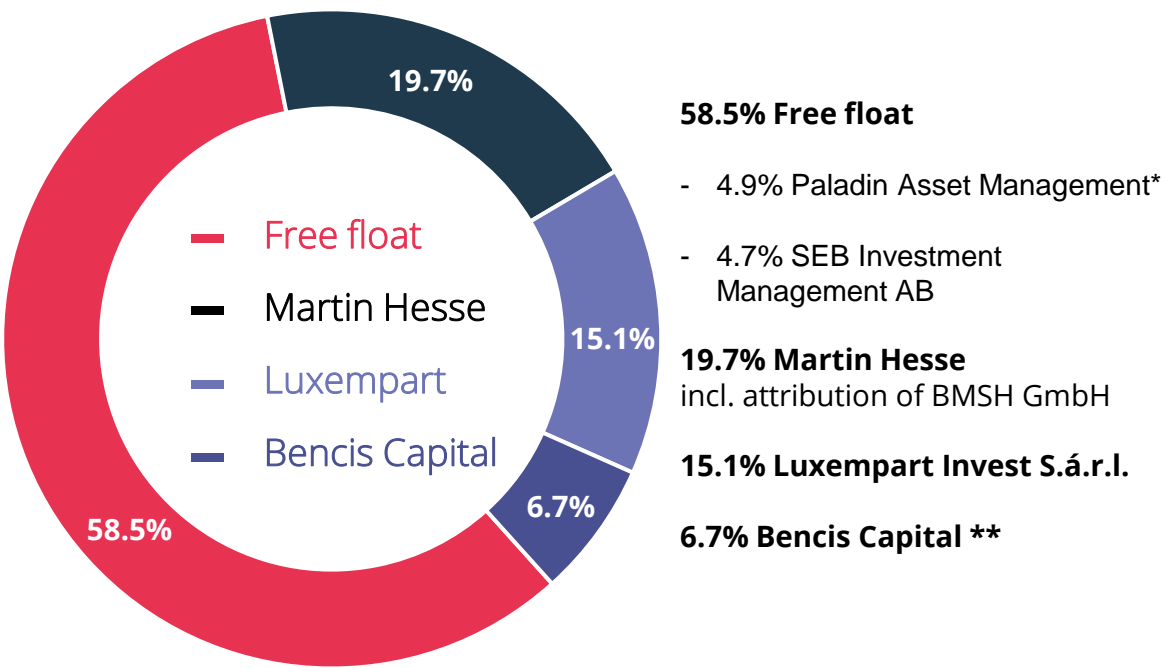
Share Capital	25,505,723€
No. of shares	25,505,723
Share class	No-par value bearer shares
ISIN	DE000A1MMCC8
	DE000A409682*
Segment	Regulated Market Frankfurt (Prime Standard)

Analyst Coverage

Covered by six international investment banks / brokers

*Note pursuant to Sec. 7 German Stock Exchange Admission Regulation (*Börsenzulassungsverordnung – BörsZulV*): From a capital increase in kind registered with the commercial register on 11 June 2024, 1,700,000 newly issued shares came into existence, which bear a separate ISIN (DE000A409682) and which are currently not admitted to trading.

Shareholder Structure



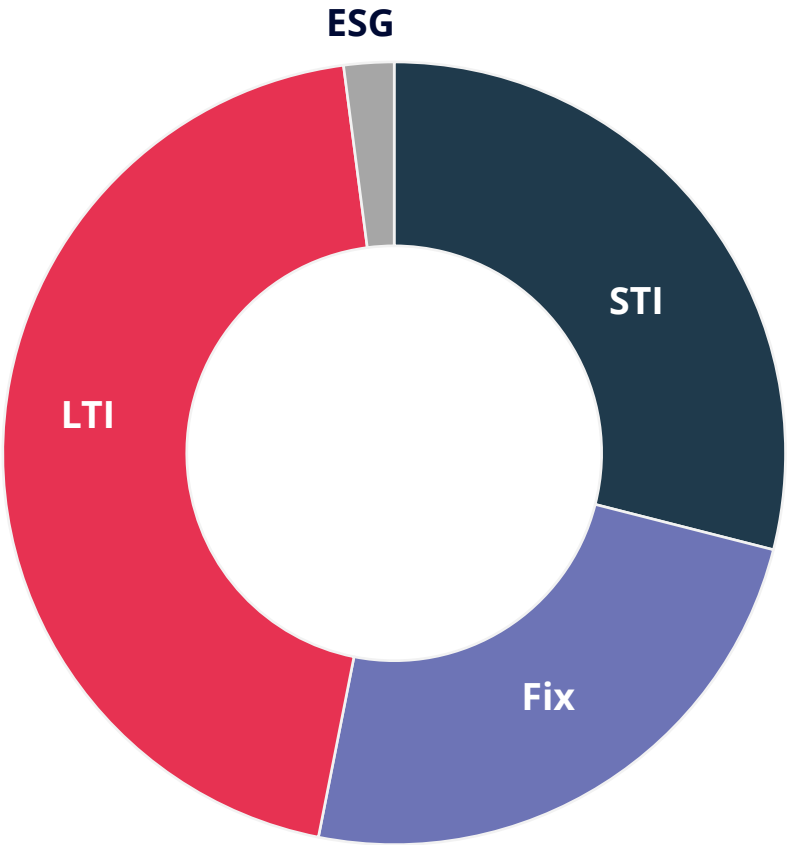
All figures according to voting rights notifications by the notifying parties

* Paladin Asset Management Investment stock corporation with variable capital and sub-funds

** In the course of a capital increase in kind in connection with the acquisition of Ceban Pharmaceuticals B.V., 1,700,000 new shares (ISIN DE000A409682) have been issued to Bencis Buyout Fund V GP B.V., acting for the risk and for the account of Bencis Buyout Fund V C.V., Amsterdam, the Netherlands („Bencis“). These new shares are subject to a lock-up agreement entered into between Medios AG and Bencis, pursuant to which the disposal of the new shares is restricted for a period of 24 months upon completion of the transaction. Therefore, these shares will not be admitted to trading during the lock-up period.

Appendix

Total target remuneration



Remuneration System for the Executive Board (March 2023)

Compensation structure of the total target remuneration

Non-performance related fixed remuneration 28 – 35%

Performance related remuneration 65 – 72%

1. Annual Short-Term-Incentive (STI) (target: 100%) 28 – 35%,
thereof

- M&A* (40 %)
- Revenue growth (20 %)
- EBITDA growth (20 %)
- EBITDA margin (20 %)

2. ESG bonus (short-term) 2 – 3%

3. Long-Term-Incentive (LTI): Stock options 29 – 42%

Sum 100%

* dependent on performance & price of target(s)

Appendix

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From German to European Leading Specialty Pharma Platform

Company Presentation | March 2025