



From German to European Leading Specialty Pharma Platform

Company Presentation - June 2025



Every day globally > 60,000 people are diagnosed with life-threatening diseases. At Medios, we are dedicated to providing timely, 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 Financial Overview, Q1 2025

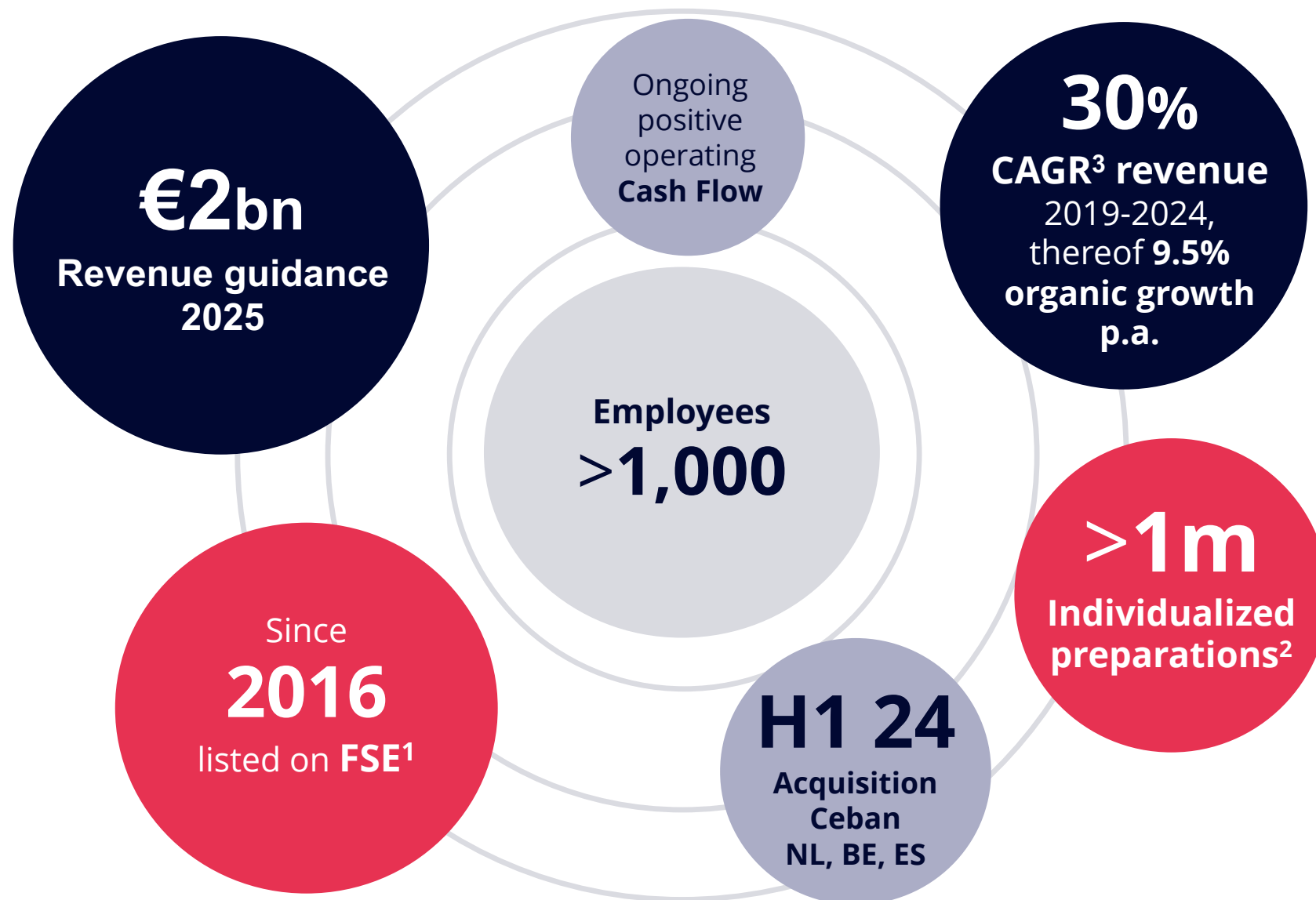
5 Outlook

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

PATIENT-SPECIFIC THERAPIES (COMPOUNDING)

- **Individualized medication compounded** 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

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

PRESENCE 

SEGMENT IB

PHARMACEUTICAL SUPPLY

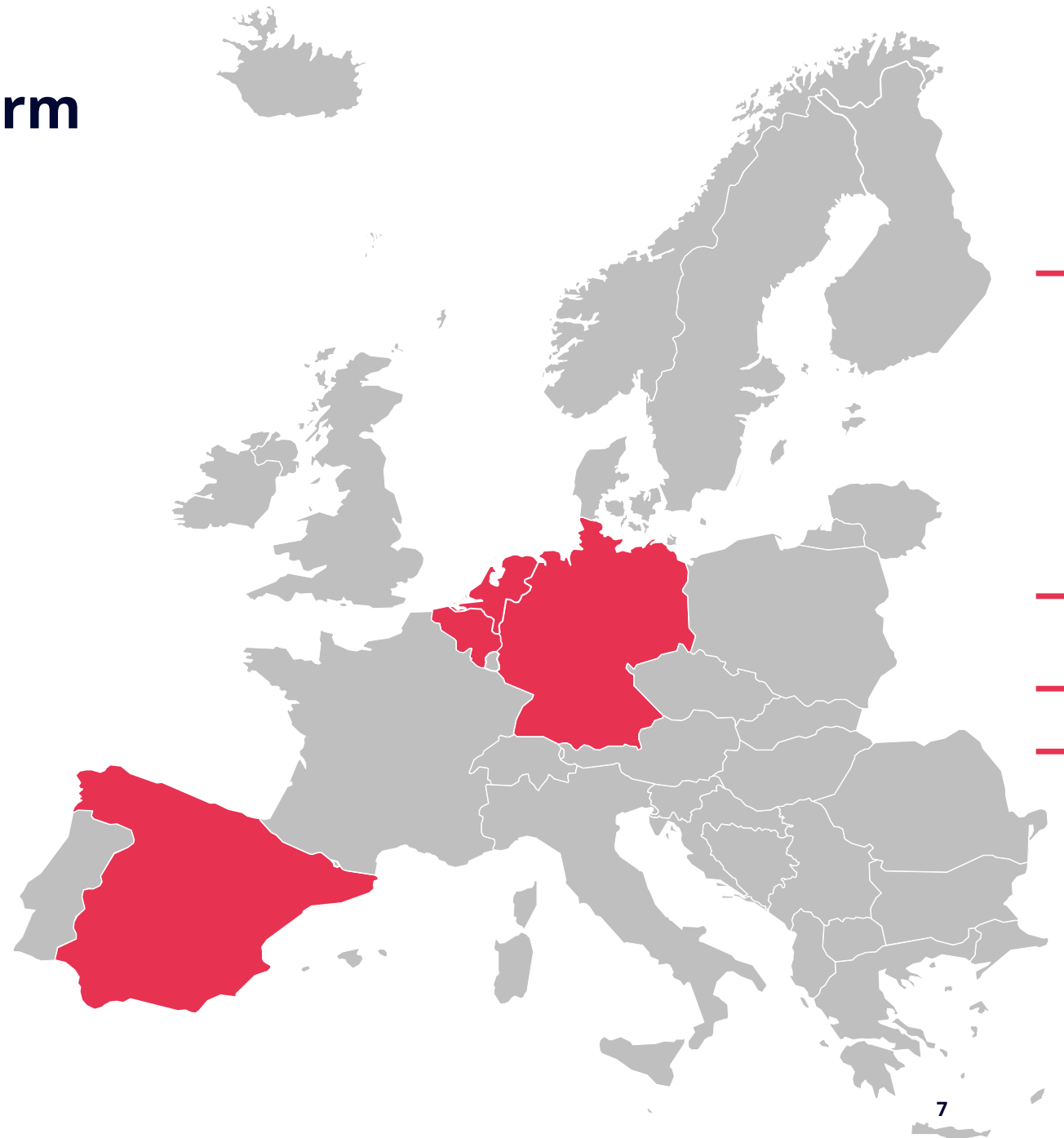
- Provides finished **(specialty) pharma products** to own compounding labs, pharmacies and hospitals
- 3 **warehouses**: 2 in Germany, 1 in the Netherlands

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
 - **23 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



Ceban Pharmaceuticals

- 4 GMP*-compliant clean room laboratories
- Manufacture (sterile & non-sterile)
- API¹-Services for pharmacies with their own production
- Own pharmacy chain with 23 branches in the Netherlands (Medsen)



Founded
2004



Netherlands
#1



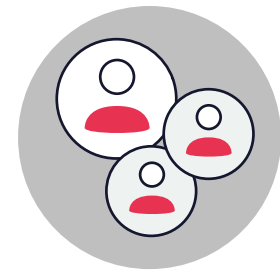
Head Quarter
**Breda,
Netherlands**



Belgium
#2

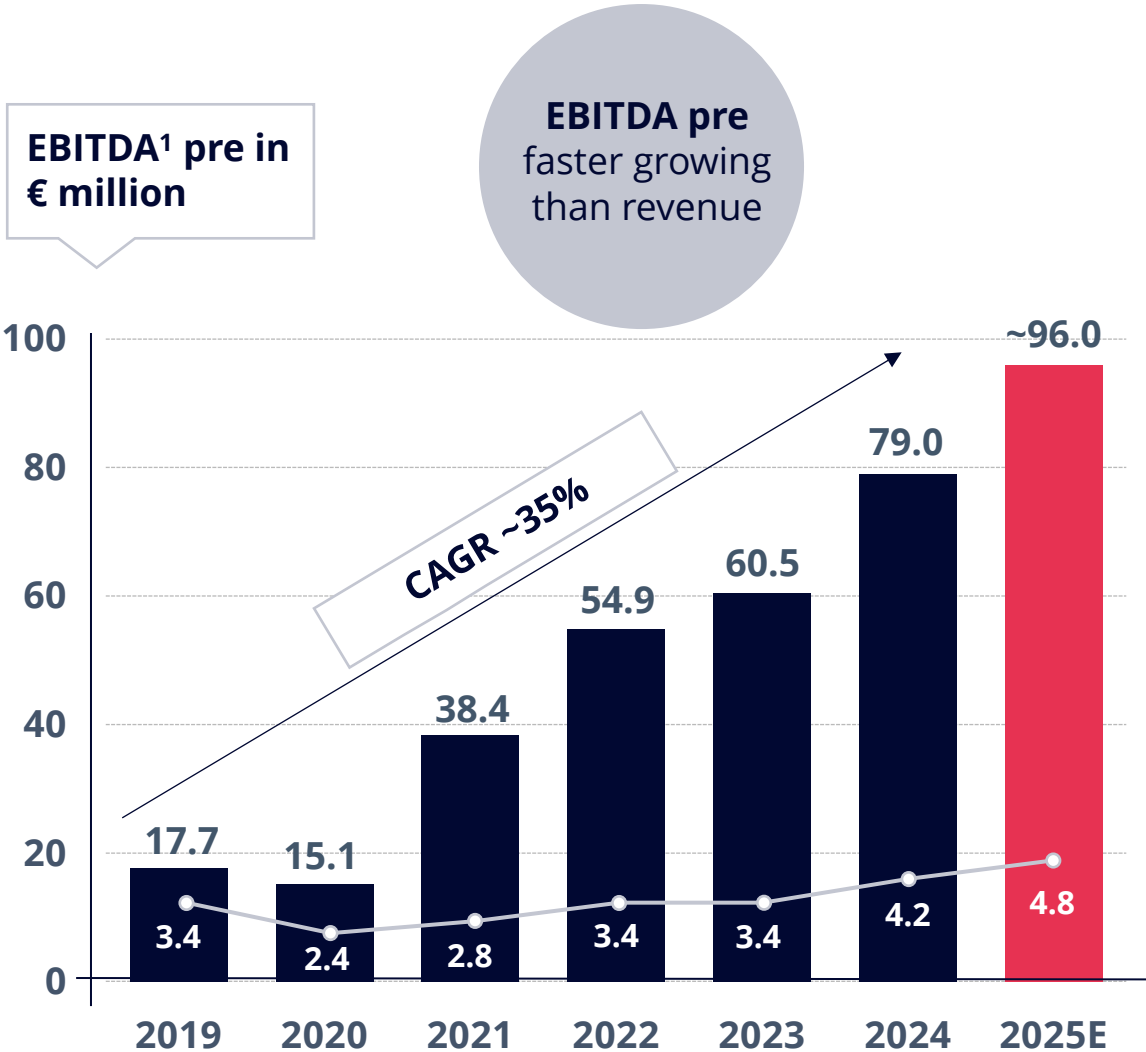
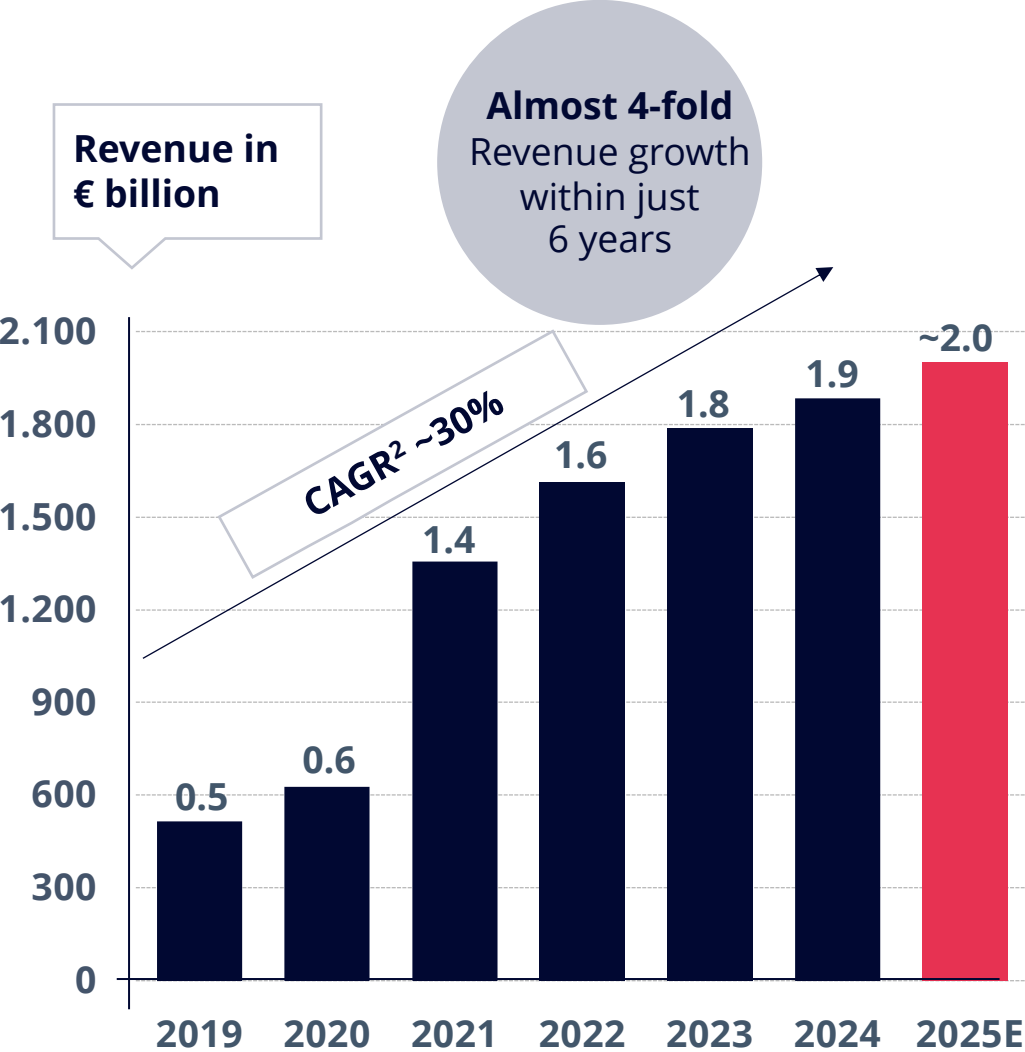


Spain
#3



Employees
~500

Sustainable revenue and EBITDA pre growth 2019 – 2024



Clear strategy to build the leading European Specialty Pharma Platform



**Strengthening
the Business
in Germany**

Continue evolving out
compounding infrastructure
in Germany

**Expansion
in Europe**

Expand compounding
within Europe to secure
sustainable growth

**Diversification
Advanced
Therapies**

Positioning as a reliable partner for
the production of ready-to-use
preparations for 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

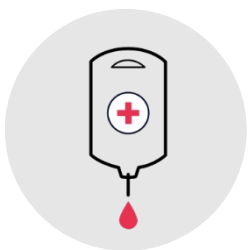
Pharmaceutical Supply (PS)



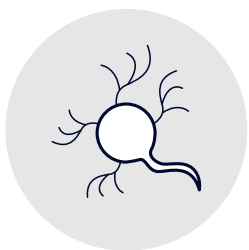
Patient-Specific Therapies (PST)



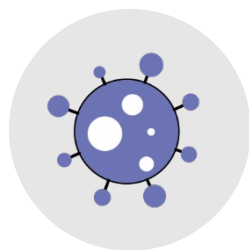
International Business (IB)



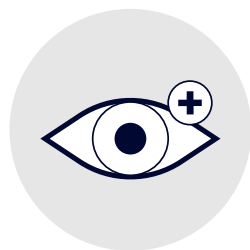
Oncology



Neurology



Autoimmune Diseases



Ophthalmology



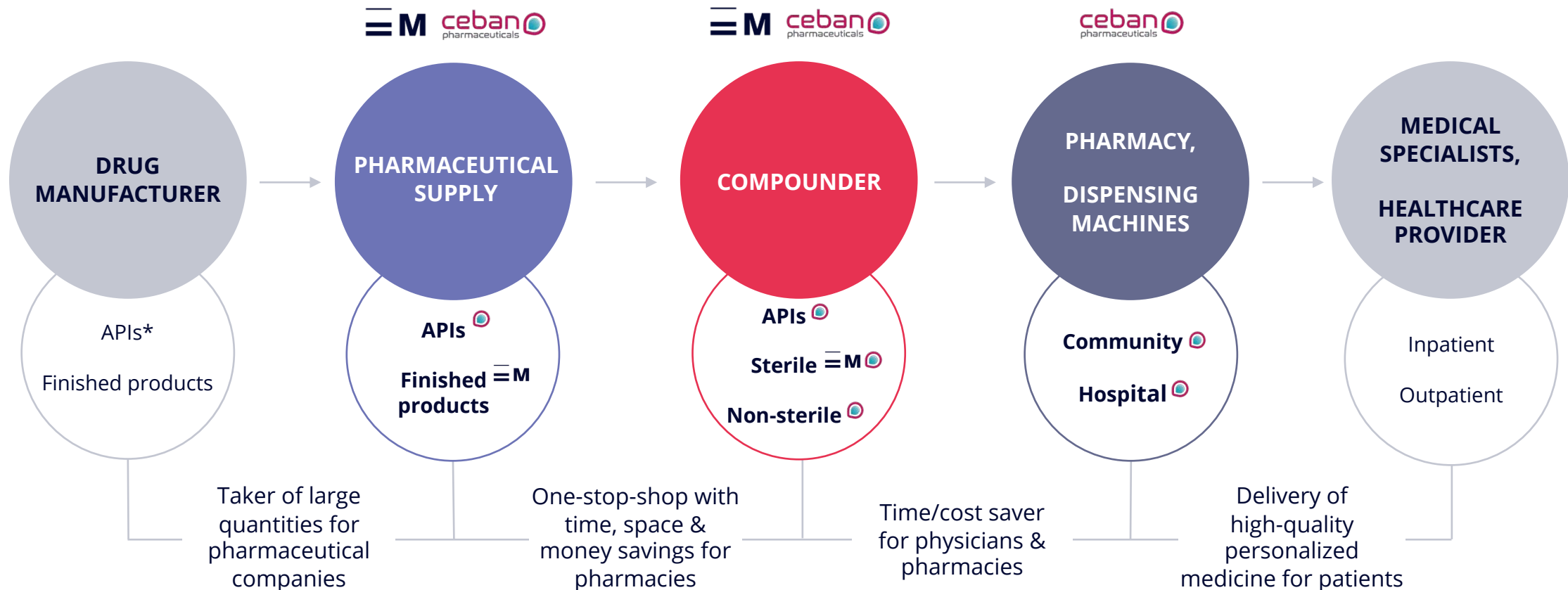
Infectious Diseases



Hemophilia

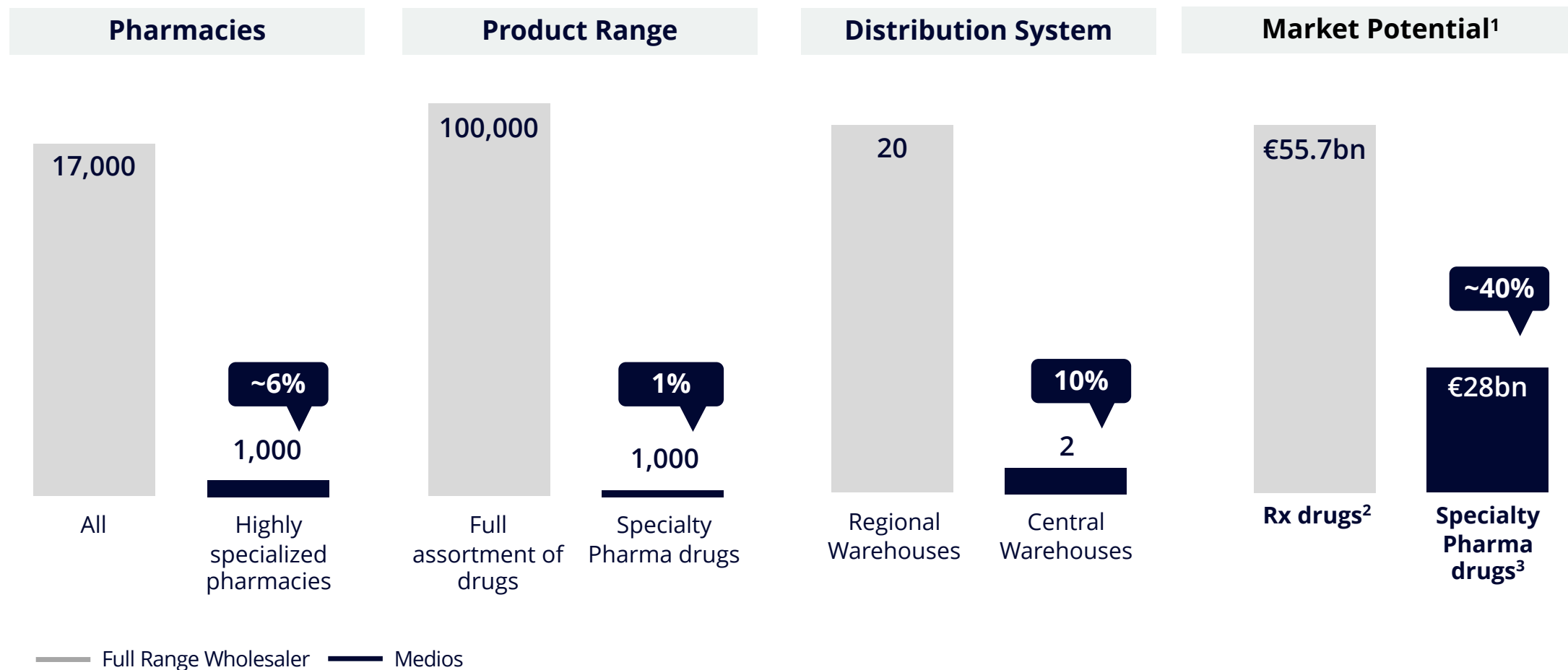


Medios' position in the simplified pharmaceutical value chain



Business Model

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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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



Key Investment Highlights

Low risk business profile

 **Largely independent**
of economic cycles

 **Sustainable annual cash**
flow generation

 **Low** capital intensity
Capex €6,3m p. a.

 Market with **steady,**
long-term growth

 **Critical size with scale**
effects to benefit from
increasing need for quality
and efficiency

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



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
- Non-transparent 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 GMP* certification
 - Less cost-effective manufacturing

Pharmaceutical Supply

NOWEDA

PHOENIX group

Alliance Healthcare

Sanacorp

omnicare

vision serion

Europarm

≡ M

zyto manufaktur

zyto service

pharmigon

Reinraumlabor Neuv

MEDIPOLIS

Niemeyer Apotheke

APOTHEKE am Salzberg

schötschke odenwald-apotheke

Hirsch Apotheke

WAAGE APOTHEKE

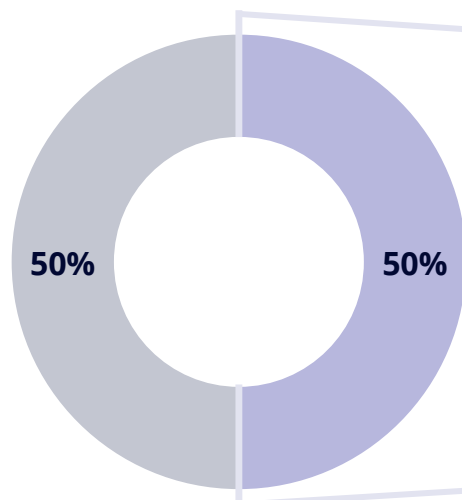
alte rats APOTHEKE

Undisputed market leader in Pharmaceutical Supply



Rx Drug Sales

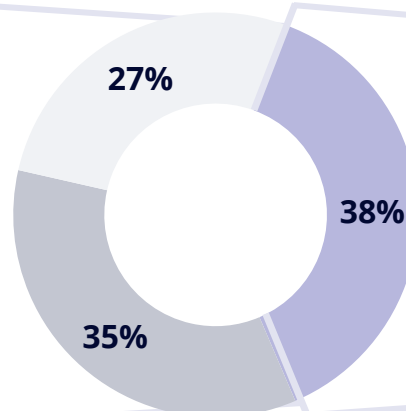
€55.7bn¹



- Specialty Pharma Drugs
- Standard Drugs

Specialty Pharma Drug Sales

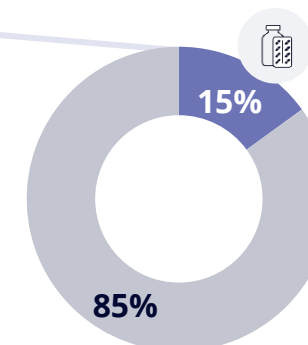
€27.9bn²



- 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

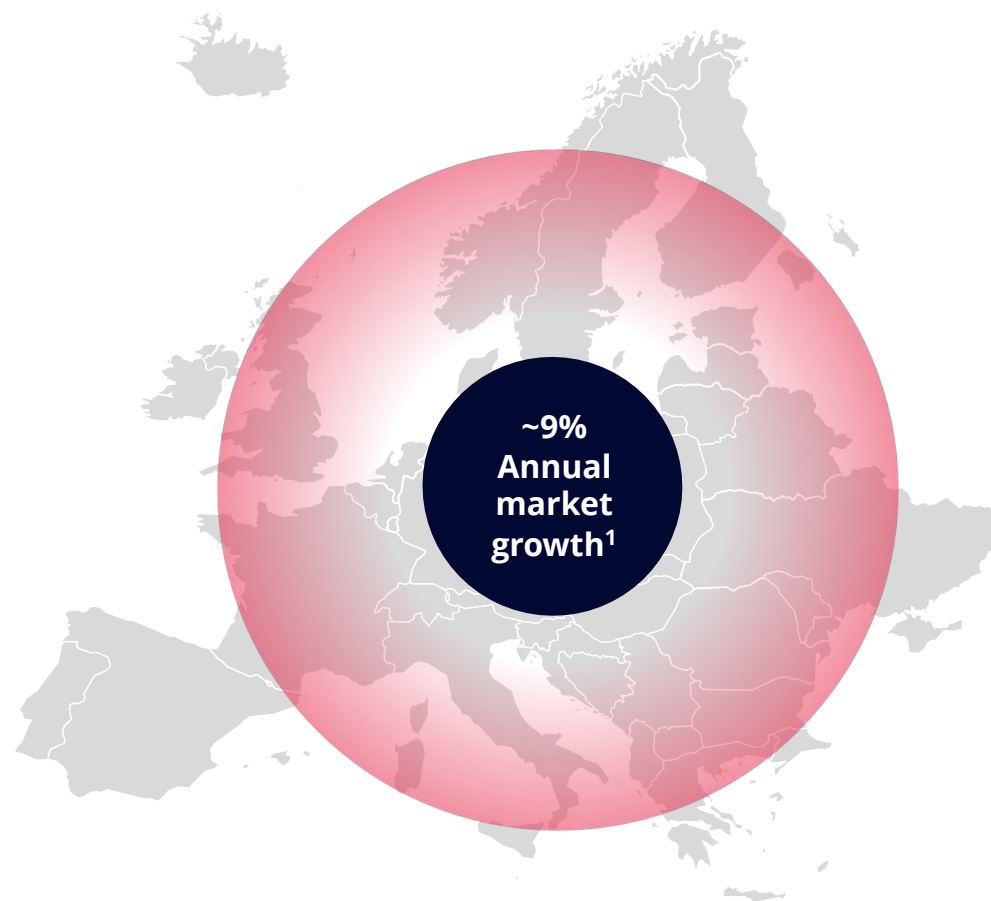
Rising prevalence of chronic disease

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

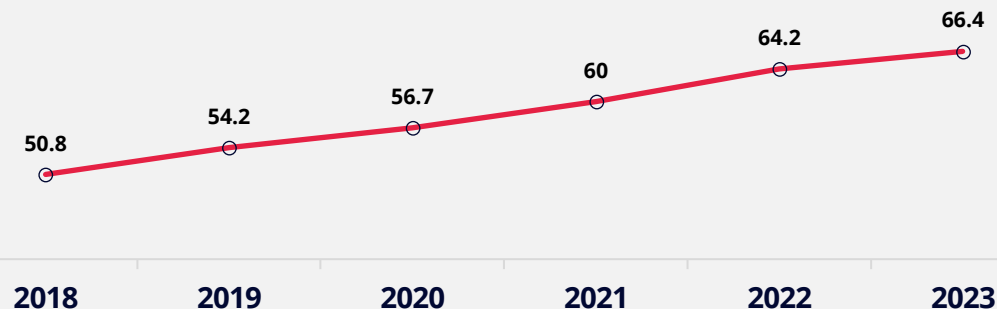
thereof

~€2.0b

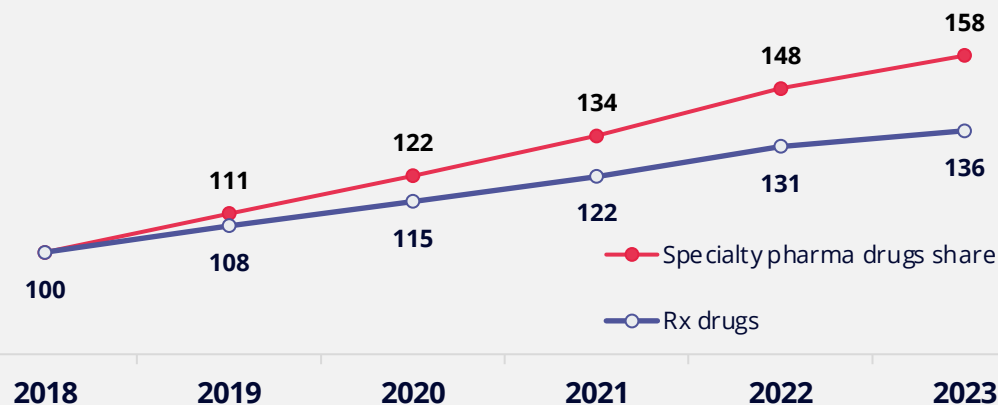
~7.0%

Medios market
share³

Pharmacies revenue in Germany (in € bn)¹

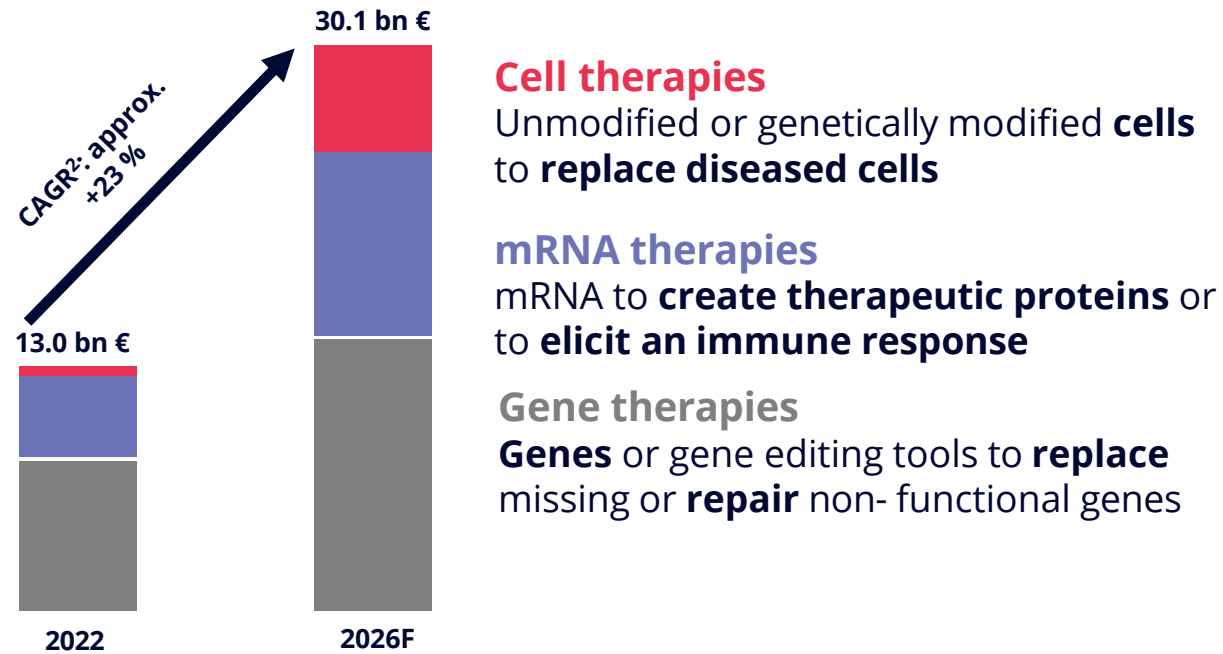


Revenue Specialty Pharma drugs² vs. Revenue all RX drugs¹ in Germany (indexed, in %)

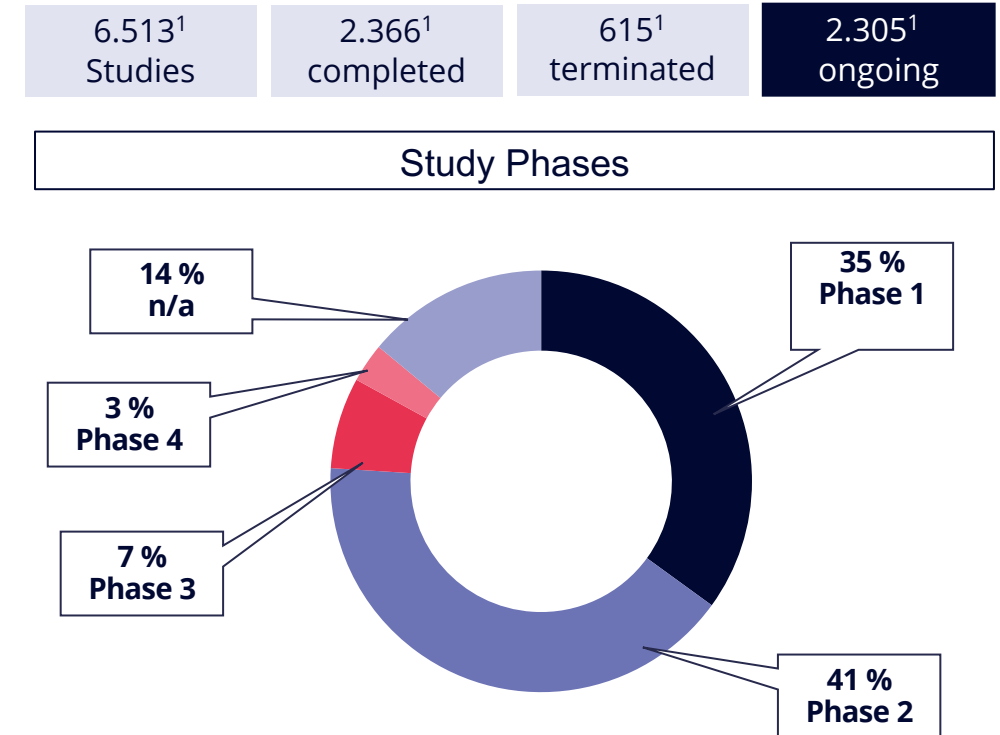


Entry into Advanced Therapies (AT) (1/2)

Advanced Therapies market remains very attractive



- Double-digit global market growth (23% CAGR)
- ATs have the potential to replace conventional cancer therapies and cure cancer
- In addition to gene therapies for hematological tumors, a cell therapy has been approved for the treatment of solid tumors
- EU clinical trial pipeline is very promising; 5 or more additional approvals are expected by 2025



Entry into Advanced Therapies (AT) (2/2)

Establishing an Organization and Competence Structure

- Medios is positioning itself as a contract manufacturer in the small-batch segment for **personalized tumor immunotherapeutics (PTI)**
- Letter of intent signed with a major client in the PTI field and initial activities have started
- Building a **core team** for the Advanced Therapies (AT) division
- Establishment of a **quality assurance** system for AT
- Development of a **partner network**
- Launch of the **AT website**

Diversification of Business Areas

- Continuation of our collaboration with developers of **personalized tumor immunotherapeutics**
- **Building a customer pipeline** for fill & finish services (contract manufacturing)
- **Evaluating opportunities in the field of Advanced Therapies (AT)** and the resulting potential



Key Investment Highlights

ESG Achievements

Double challenge:

- **First non-financial report** in accordance with the European Sustainability Reporting Standards (ESRS²) of the **CSRD**¹ as a reporting framework
- First report **after the Ceban takeover**

Milestones achieved:

- **Survey of KPIs** to create a basis for reviewing, adapting and further developing the ESG strategy
- **Double materiality analysis** completed - around 650 relevant data points identified
- Preparation for the new mandatory ESG reporting obligation completed
- **Establishment of processes** for Group-wide ESG management



Culture, leadership and sustainability as key enablers

Key Investment Highlights

ESG highlights 2024

Proportion of women

69%

in workforce

47%

in management



0.1%

Customer
complaint rate



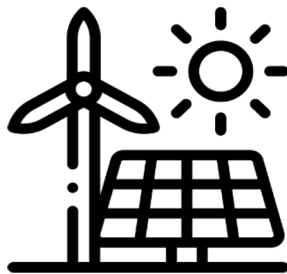
1,208 t CO2e

Scope 1 & 2
emissions in Germany
Offset (c. -16% vs. 2023)



64%

Share of green
electricity



We are committed to the
**UN Global Compact
Corporate Responsibility
Initiative**

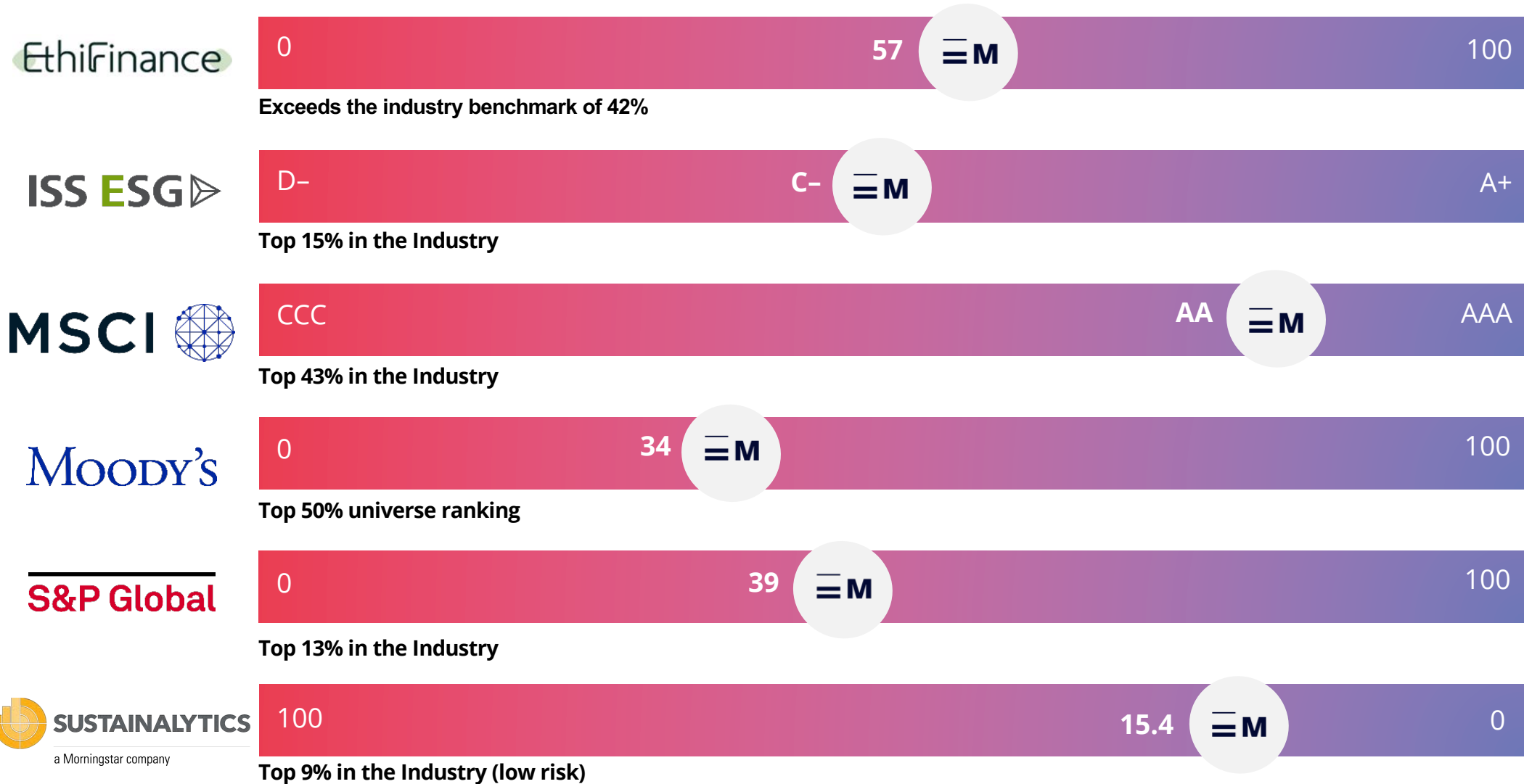
and its principles in **the
areas of human rights,
labor, environment and
anti-corruption.**

WE SUPPORT



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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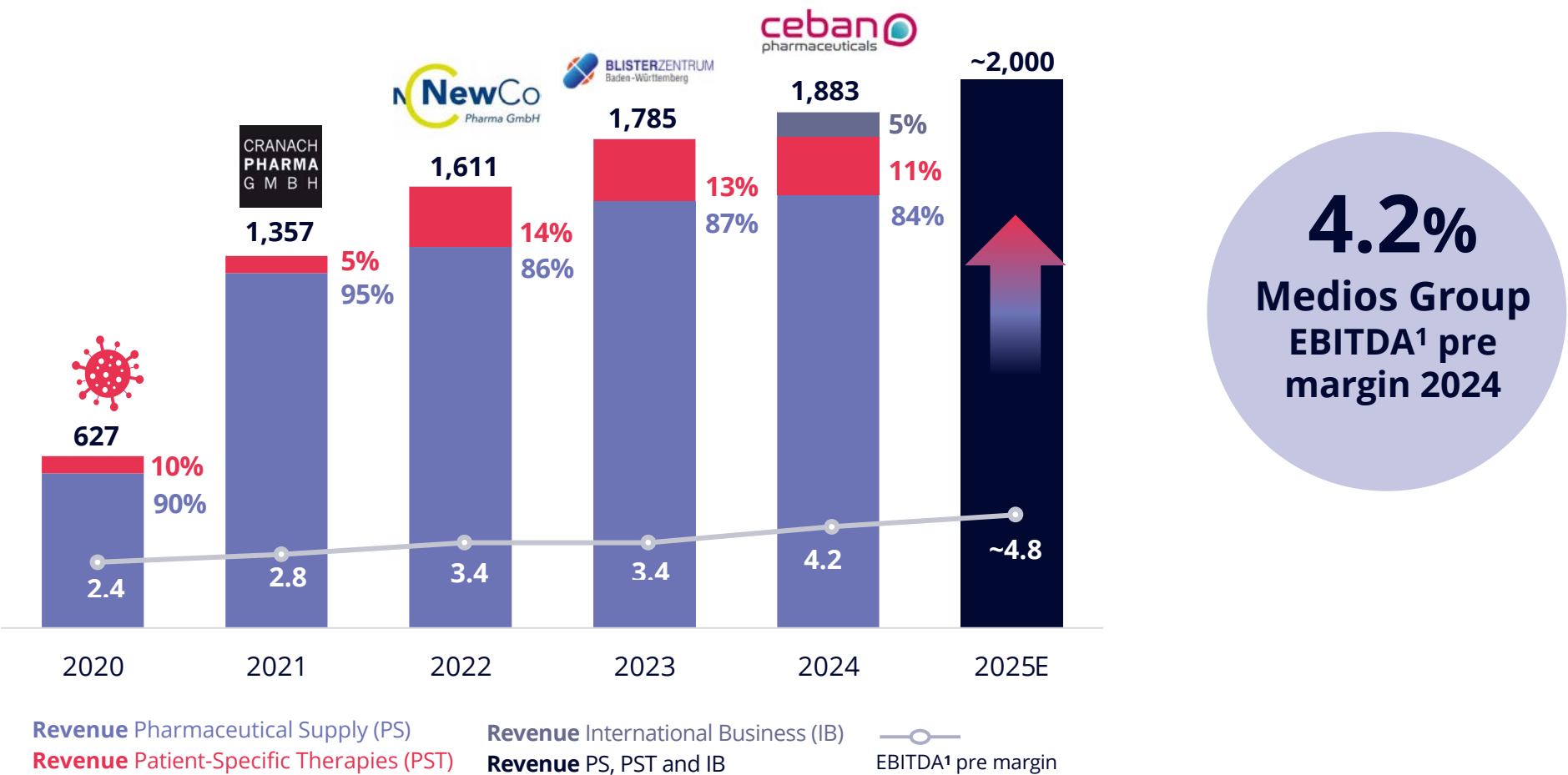
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Ongoing growth and significant EBITDA pre margin increase

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

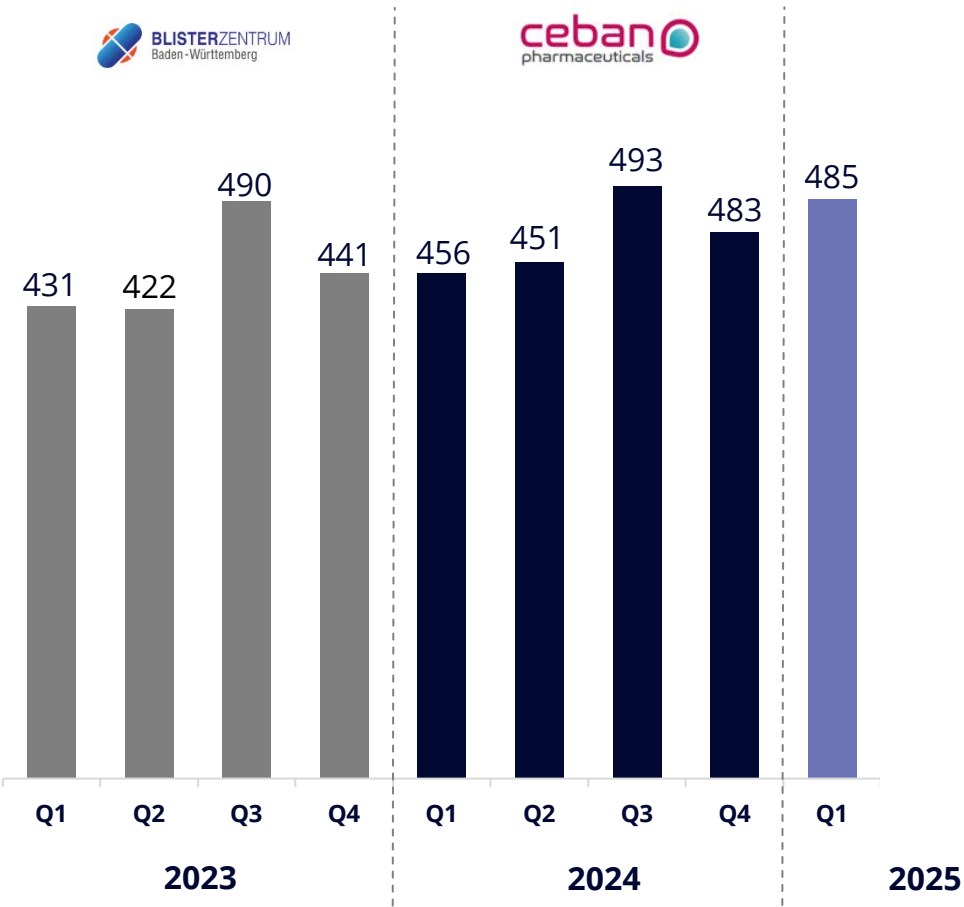


¹EBITDA is defined as consolidated earnings before interest, taxes, depreciation and amortization; EBITDA pre is adjusted for special charges for stock options, expenses for M&A activities and one time performance-based payments for the acquisition of compounding volumes as well as from 2024 expenses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

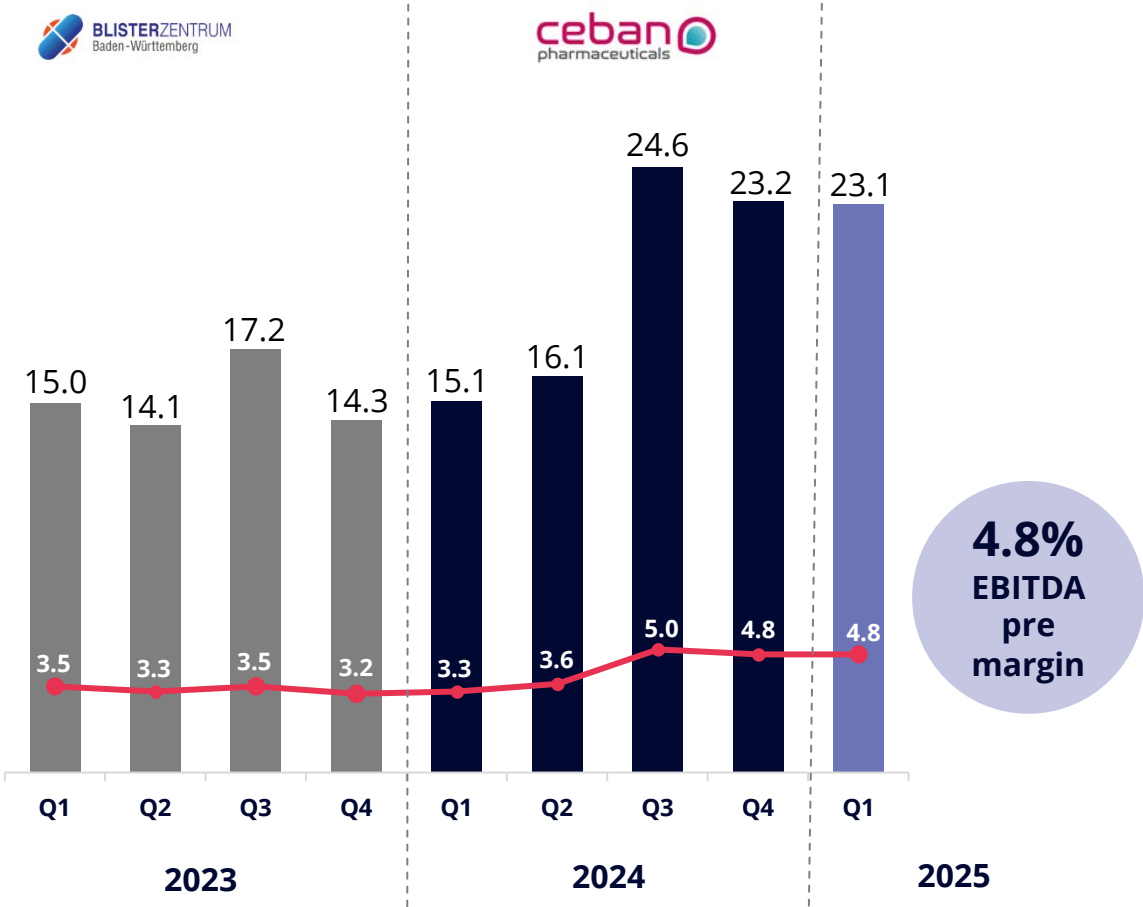
Financial Overview

QoQ – Revenue and EBITDA pre growth

Revenue (€m)



EBITDA¹ pre (€m)



Status Debt financing

- **New financing structure** concluded in Nov 2024 : **€225m**, thereof
 - €125m as **term loan**, term: 5 yrs, repayment started in March 2025; **€6.25m**, annually €25m 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 March 2025
 - Includes **fully drawn term loan (appr. €119m)** and **drawn RCF (€65m)**
- **Estimated** annual future **free cash flow**: c. €40m - €50m
- Estimated annual cash flow available for redemption of credit facility: c. €30m - €40m



Q1 2025 – Substantial disproportionate EBITDA pre increase

	Pharmaceutical Supply 'PS'		Patient-specific Therapies 'PST'		International Business 'IB'		Services		IFRS consolidation		Group	
YoY in € million	Q1 25	Q1 24	Q1 25	Q1 24	Q1 25	Q1 24	Q1 25	Q1 24	Q1 25	Q1 24	Q1 25	Q1 24
Segment revenue – extern. delta (yoy* in %)	389.2 -2.9%	401.0	55.8 1.3%	55.1	39.5 n/a	0	0.1 -4.1%	0.1	0	0	484.7 6.2%	456.2
EBITDA ¹ pre delta (yoy* in %)	11.8 7.0%	11.0	6.3 6.4%	5.9	7.3 n/a	0	-2.4 24.1%	-1.9	0	0	23.1 52.9%	15.0
margin (% of revenue external)	3.0%	2.8%	11.3%	10.8%	18.4%	n/a	<-100.0%	<-100.0%	n/a	n/a	4.8%	3.3%

¹EBITDA 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 one time performance-based payments for the acquisition of compounding volumes as well as from 2024 expenses for ERP-System implementation | *yoy year over year

Q1 2025 – Solid Group Financials

In € million	Q1 2025	Q1 2024	Δ in %
Revenue	484.7	456.2	6.2%
Gross profit¹	49.8	27.6	80.0%
<i>gross margin in %</i>	10.3%	6.1%	4.2ppt
EBITDA² pre	23.1	15.1	52.9%
<i>margin in %</i>	4.8%	3.3%	1.5ppt
Conversion rate in % (EBITDA pre/gross profit)	46.3%	54.6%	-8.3ppt
EBIT	12.3	6.5	88.5%
EPS (€), undiluted	0.25	0.17	47.1%
CF from operating activities	3.6	43.4	-91.8%
CF from investing activities	0.4	-0.4	<-100.0%
CF from financing activities	-21.0	-1.3	>100.0%
Free cash flow³ (before M&A)	2.3	42.9	-94.6%
	31 Mar 2025	31 Dec 2024	Δ in %
Inventories	96.0	92.4	3.8%
Cash & cash equivalents	89.2	106.0	-15.9%
Equity	516.8	510.2	1.3%
<i>ratio in %</i>	55.6%	54.6%	1.0ppt
Liabilities	412.0	424.2	-2.8%
<i>ratio in %</i>	44.4%	45.4%	-1.0ppt

Comments

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

Revenue growth of 6.2% mainly driven by IB; PST +1.3%; PS decline (-2.9%) due to focus on higher-margin revenue

- **Gross profit** increased mainly due to IB; PS rose despite lower revenues; PST rose mainly as a result of the elimination of performance-based payments for additional compounding orders of €1.4m
- **EBITDA pre** rose by 52.9% driven by contribution of IB and supported by PS and ST
- **Operating cashflow** decreased due to reporting date-related net working capital effects
- **Investing CF** consists of capex (€-1,2 m), accrued purchase price payments for CEBAN acquisition (€-1,5 m€) and a divestment (+€2.4m)
- **Financing CF** resulted from loan repayments €-16.3m, thereof repayments of the term loan €-6,3 m and of the RCF € -10,0 m), interest payments for loans (€-3.4m) of lease liabilities (€-1.3m)
- **Cash & cash equivalents** consisted mainly of freely available bank deposits



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

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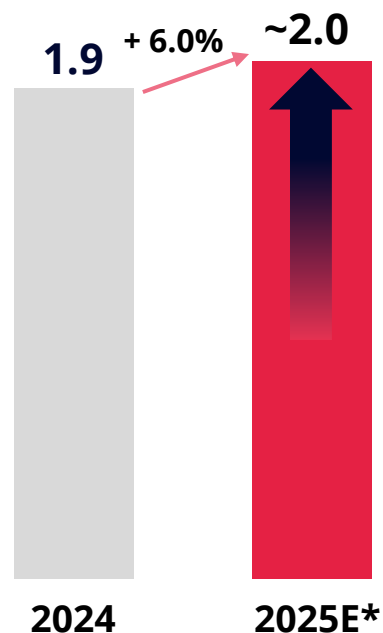
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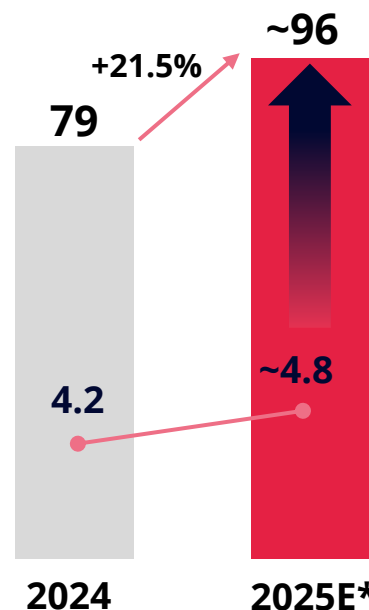
Appendix

Disproportionate EBITDA pre increase expected

Revenue (€bn)



EBITDA¹ pre (€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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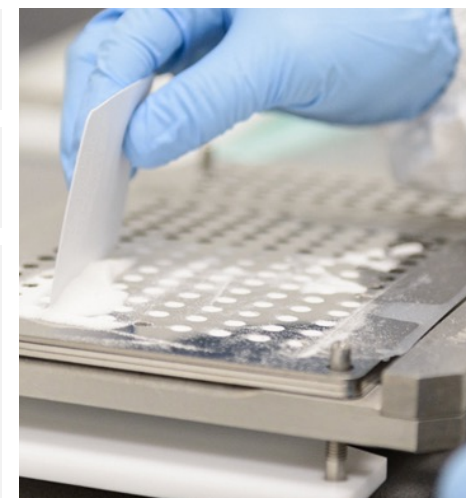
Appendix

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"> 23 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

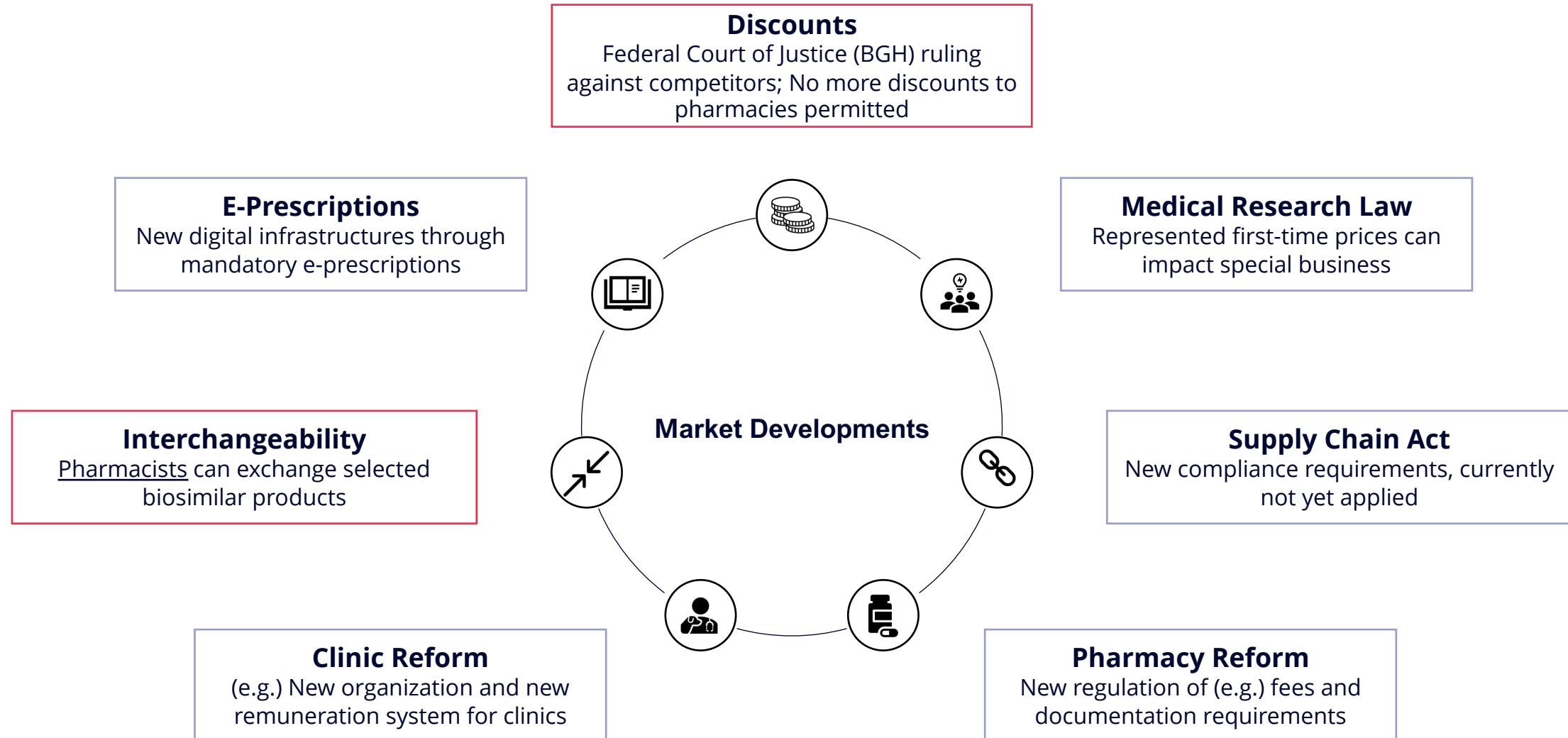
Transformative and value enhancing acquisition

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

FY – 2024 Strong PS and IB

	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%

Regulatory developments Germany



Appendix

The Medios share

Basic Information

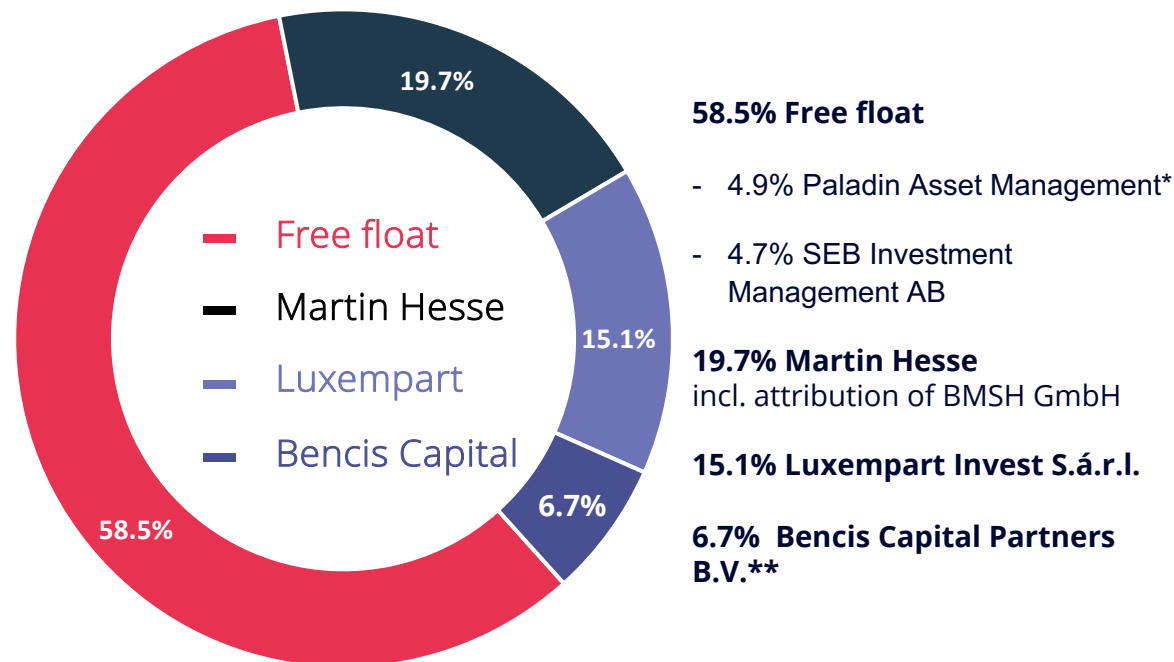
Share Capital	25,505,723€
No. of shares	25,505,723
Share class	No-par value bearer shares
ISIN	DE000A1MMCC8
	DE000A409682*
Segment	Regulated Market Frankfurt (Prime Standard)

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



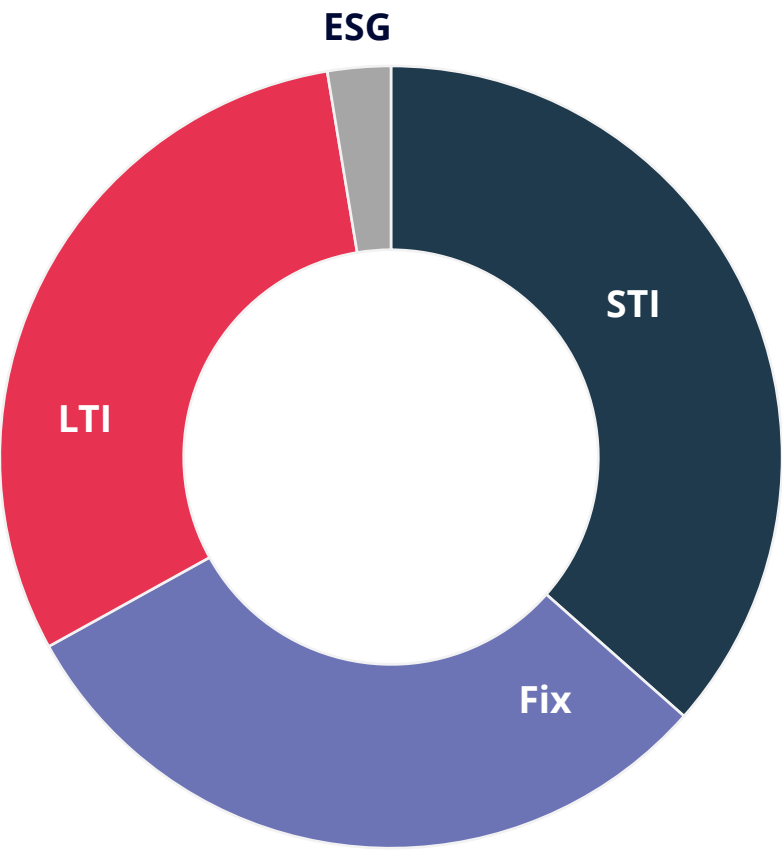
All figures according to voting rights notifications by the notifying parties

* 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

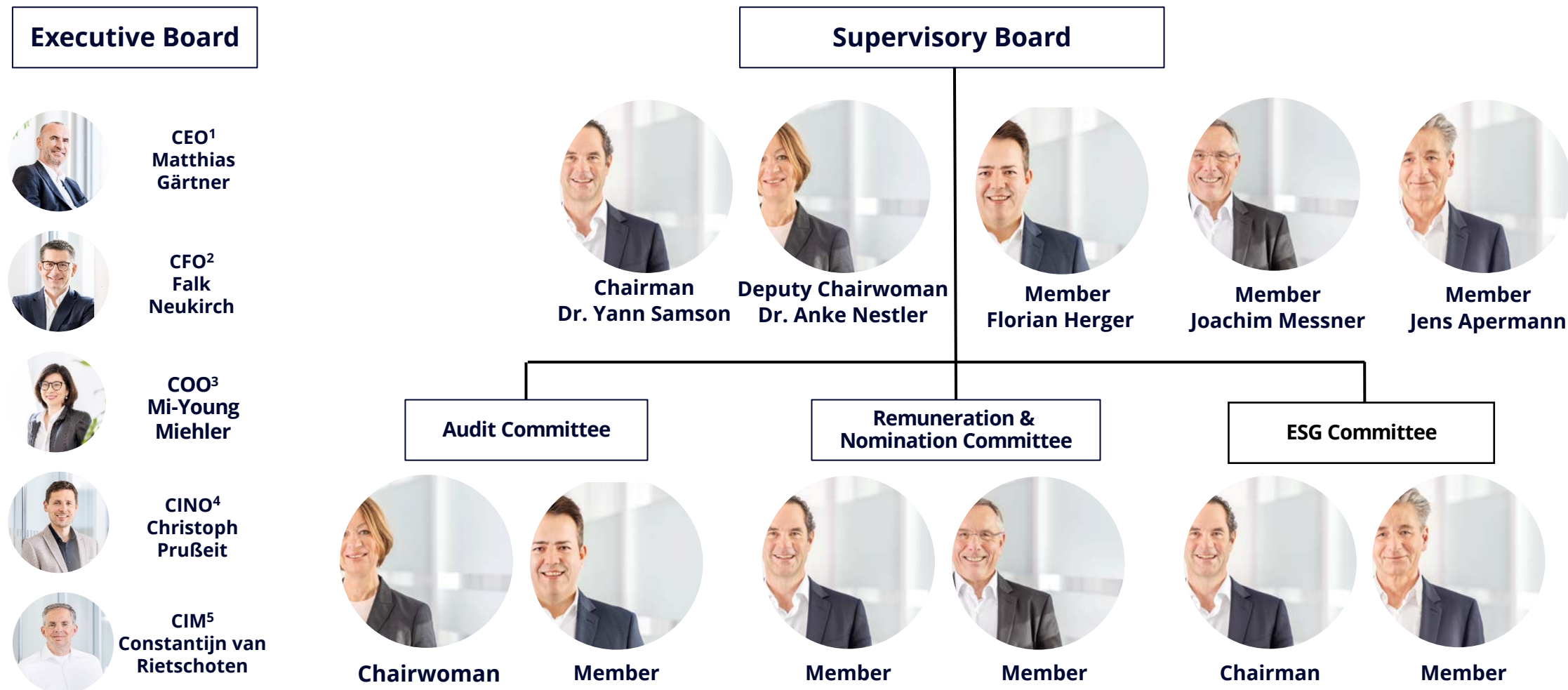


Remuneration System for the Executive Board (May 2025)

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%) <i>thereof</i>	28 – 35%
• Revenue growth	(20%)
• EBITDA growth	(30%)
• EBITDA margin	(30%)
• Operational cash flow	(20%)
2. ESG bonus (short-term)	2 – 3%
3. Long-Term-Incentive (LTI): Stock options	29 – 42%
Sum	100%

Medios Management – Executive and Supervisory Board



Appendix

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From German to European Leading Specialty Pharma Platform

Company Presentation - June 2025