WE ARE UNSTOPPABLE MEAR GoDeeper with Bavencio



5 mins

20 mins 10 mins

10 mins 10 mins 10 mins

10 mins

10 mins 10 mins 10 mins

5 mins 5 mins 5 mins 20 mins

10 mins

Opening and obj

Strategy and Performance: Bavencio in UC Bavencio growth workstreams

Bavencio Ambition

- · Russia ambition
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Q/A

Coffee break

New Launch Markets workstream: Algeria Go Deeper' LMIC workstream: Egypt Q/A

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Establishing UNSTOPPABLE LAUNCH y Lessons learned and insights Q/A

Closing

Mohamed and Harshveer

Amr, Harshveer, Mohamed and Niklas Tanguy

Moderator: Mohamed Panel: Amr, Charlie & Tanguy

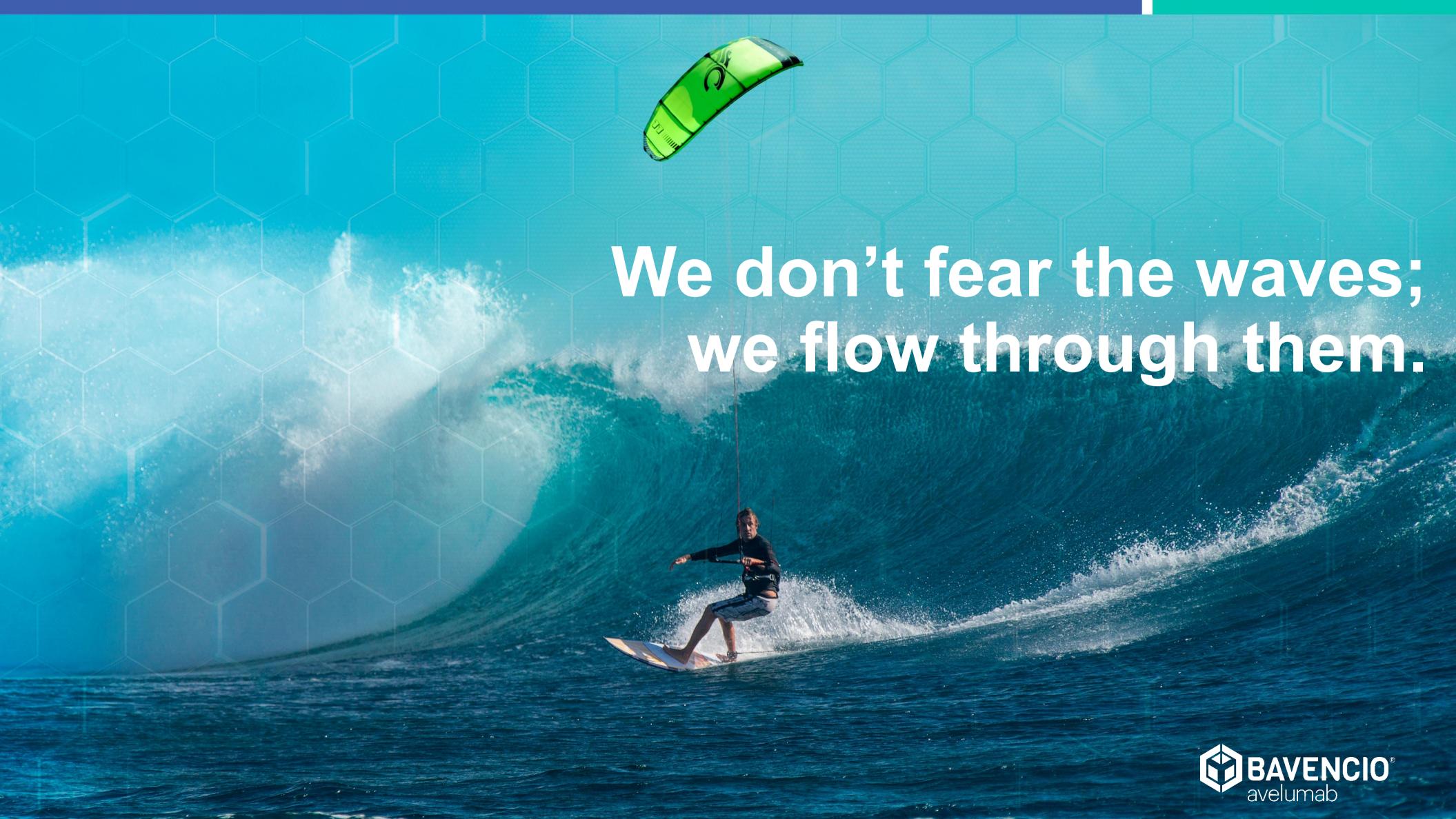
Moderator: Mohamed and Ihab Panel: Amr, Tanguy, Charlie North Africa and Egypt

Charlie

All

All

Kaj Linna



From Ambition to Reality: TOGETHER, We delivered against all odds with BAVENCIO®



Patients ~80,000 patients treated



Performance

-0.9% growth vs F2 2025
MEAR biggest growth driver @5.9%



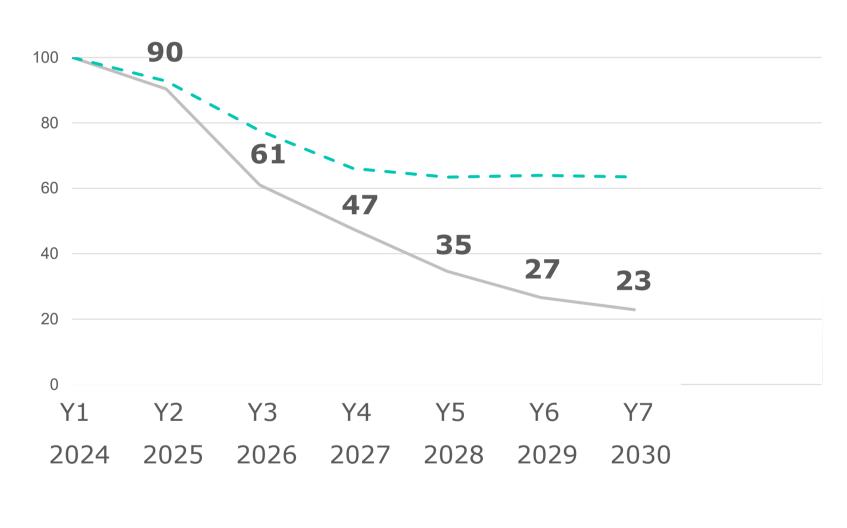
LifeCycle Management

MEDLEY: Positive Study
JP RWE: New OS Benchmark
DISCUS: ESMO 2025 Readout



Competition
WE outperform analogue

BAVENCIO sales projections do better than market analogues



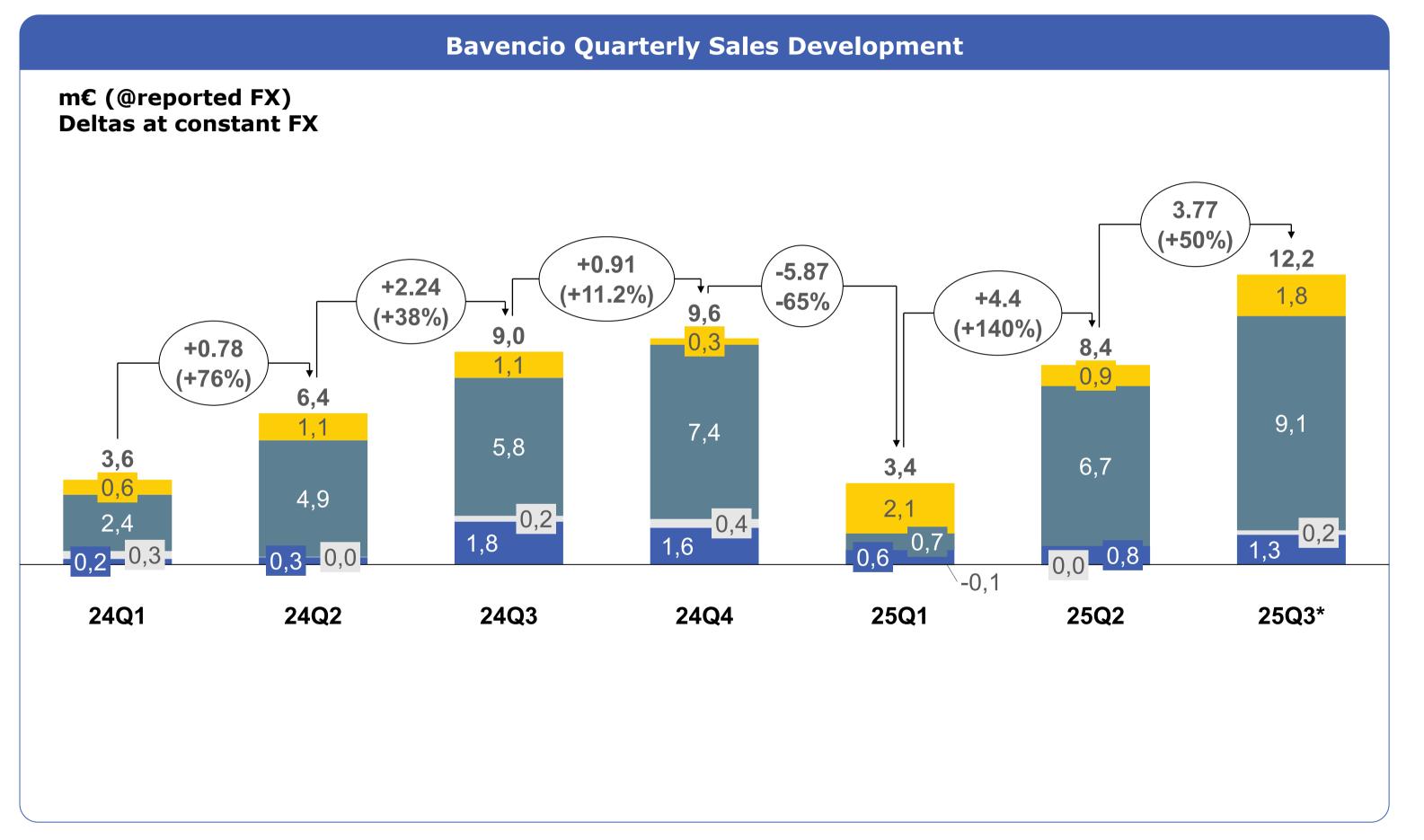
----- Analogue average
BAVENCIO SD

Source: Evaluate Pharma, PriceRx, Datamonitor; Broker reports; L.E.K. research and analysis

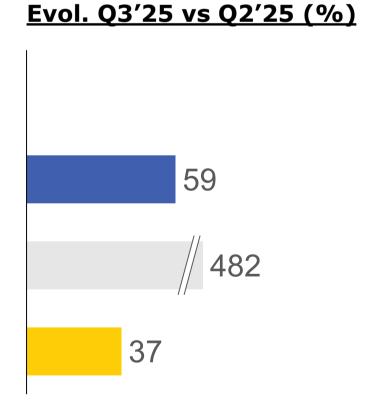


MEAR Bavencio Net Sales (quarterly evolution)

Russia Drives the Sales Rebound from Q2'25





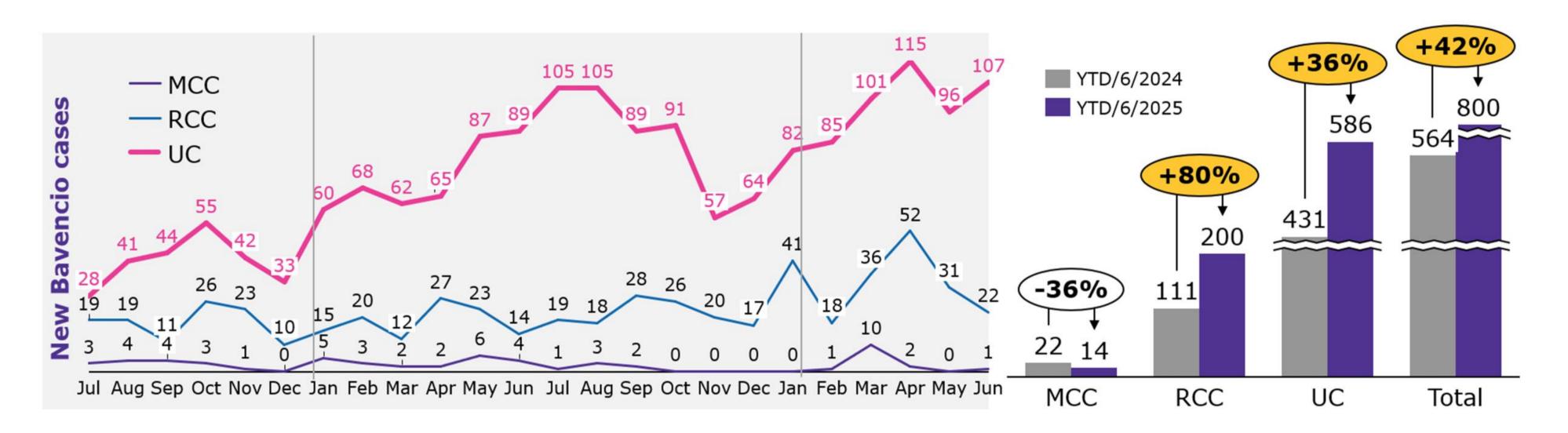




25Q3*: Q3 is consist of Jul. and Aug Act plus Sep in F2 due to Actual is not ready

Strong growth in new Bavencio cases in both UC & RCC

We aim to support 1,500 NEW cases in 2025



Must win battles

- 1. Maximize Bavencio maintenance in UC (offense/defense strategy)
- 2. RUS expanded access program
- 3. TR PDL standardization & maximize maintenance

YTG

- 1. Accelerated recruitment RU/TR
- 2. Launch DZ/LY/KZ

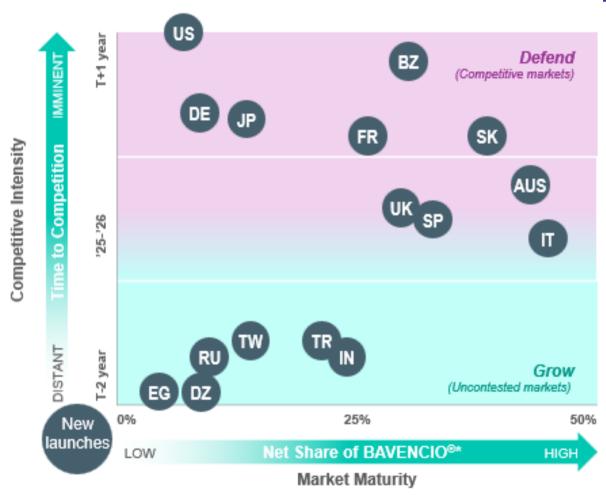




Defend our market position while capitalizing on all short to long-term growth opportunities

DEFEND competitive Markets: Differentiate and customize tactics to establish JBR' as Treatment of Choice in the competitive 1L mUC market.





Dual Mission

DZ = Algeria, TW = Taiwan, TR = Turkey; EG = Egypt

GROW Uncontested Market: Capitalize on growth opportunities and establish maintenance's role in 1L mUC while building brand loyalty and expanding HCP adoption. Execute launch excellence in new market.





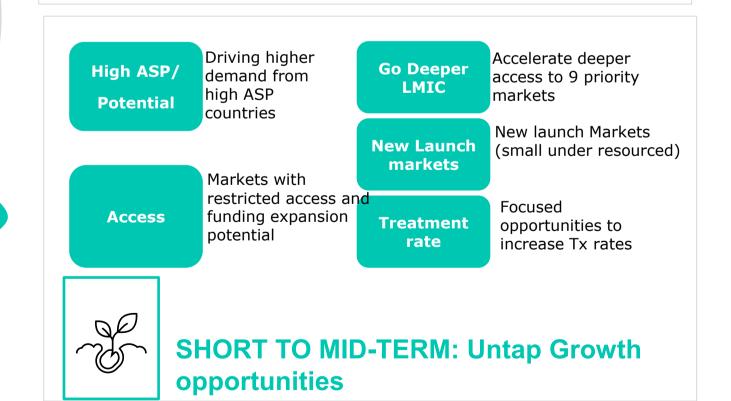
LONG-TERM: DELIVER on our Life Cycle

UC

- ✓ Leverage JAVELIN Bladder MEDLEY
- ✓ DISCUSS: 3 vs 6 Cycles of Chemotherapy
- ✓ Execute NECTIN-4 expression/Amp strategy

Others

- ✓ Prepare for CAVE-2 readout in CRC
- ✓ Continue to explore adjuvant MCC opportunities





A very Dynamic environment – Learnings & Opportunities

DEFEND Competitive markets

GROW Uncontested markets



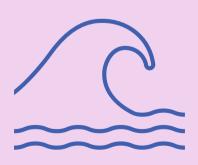
Competition wave is now a reality

HCPs see EV+P as highly efficacious despite cumulative toxicities for patients

HCP willingness to try EV+P is faster and steeper than expected

SoV challenged by EV+P hype and access to HCPs

BAVENCIO® maintenance limited by 1L platinum bottleneck





Riding with impact

Strong JBR dataset with consistent RWE; While EV+P RWE underwhelming vs RCT

EV+P Market Share ceiling in the US, Platinum rebound in Switzerland

We are making impact: key messages, HCP segmentation and patient profiles

Potential for fewer chemo cycles (e.g. DISCUS) may improve pt experience





Catching the next swell

Address patient unmet needs via prioritized Tx funnel levers

> Wave of new launches in emerging markets

Expand access where there are restrictions (private, PD-L1+)

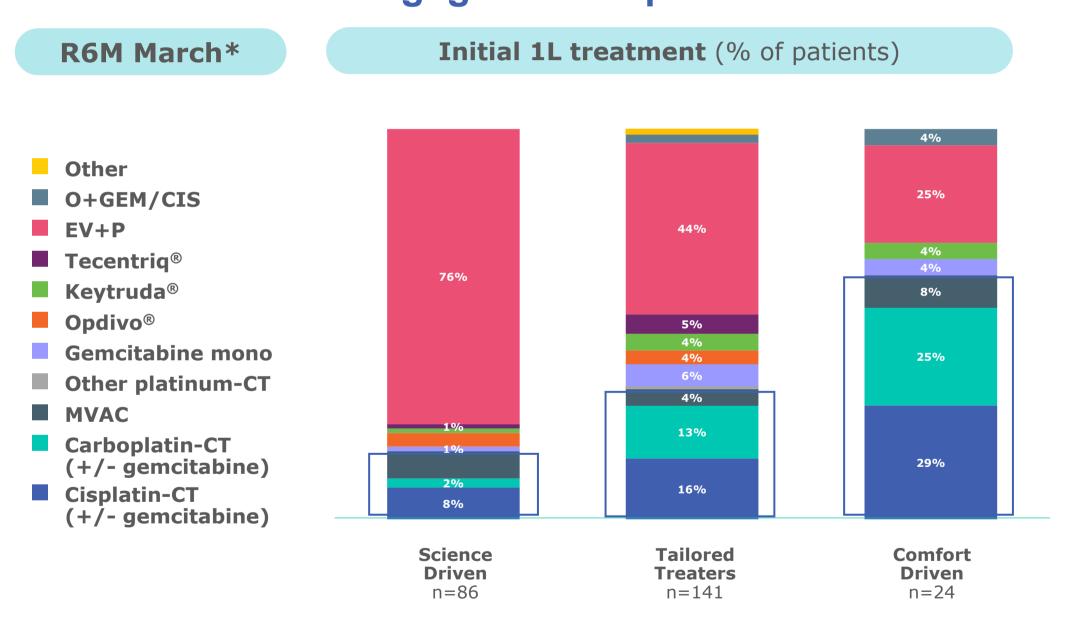
LCM: Positive MEDLEY study. EV+P adjuvant IA readout at ESMO



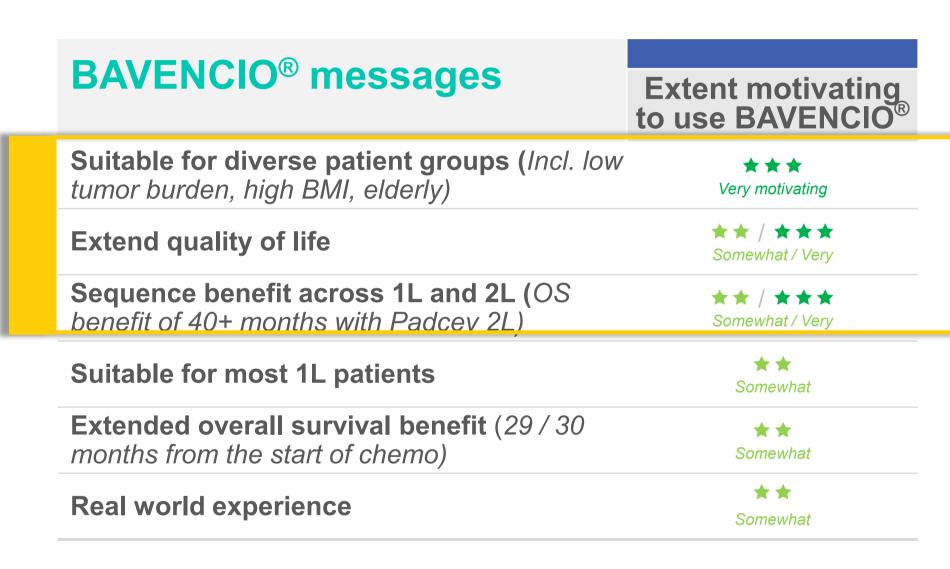


Key learnings:

HCP Segmentation works: Refocusing our efforts on winnable segments will drive topline efficiency & engagement impact



Our messaging on pt needs, extended QoS and Sequence strongly resonates with **HCPs**



Differentiation opportunities





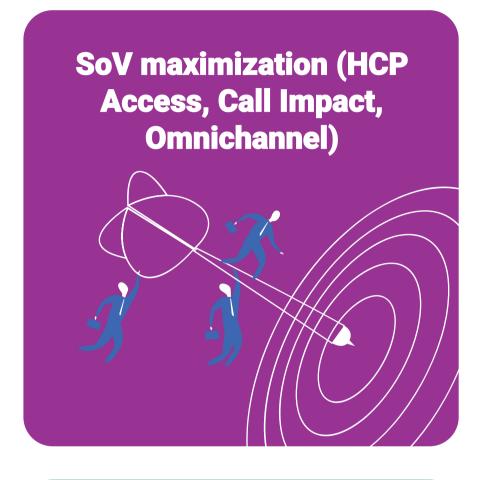


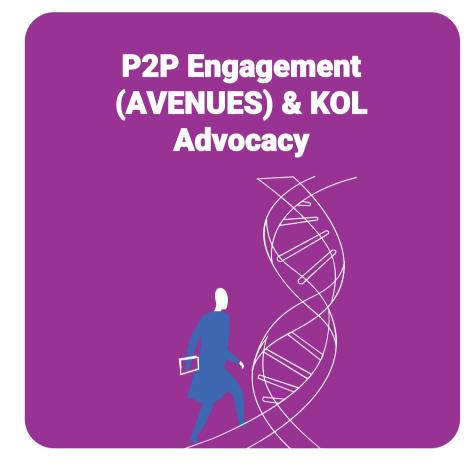
2026 Must-win Battles will pave our way to return to growth Answering for 4 Strategic Questions

How do we ensure JBR 100 How can we continue How can we maintain How can we ensure JBR's ISSUE/ to drive BAVENCIO®'s growth BAVENCIO® as mUC leader value is differentiated vs is being preferred **OPPORTUNITY** in mUC? competition? up front? despite competition? Achieve target for each Achieve >25% BAVENCIO® Achieve favourable HCP lever throughout treatment funnel Establish confidence through data overall NET share **OBJECTIVE** perception on all our target generation & increase advocates Defend pricing & remove access patients' profiles >45% in uncontested markets restrictions Reinforce JBR followed by EV as Capitalize on Establish BAVENCIO® **MUST-WIN** Win our Target Patients' Profiles an optimal sequence all growth levers **BATTLE** as Tx of Choice in mUC SI2: Anchor Optimal Sequence SI1: Amplify Quality Survival SI3: Augment market position SI4: Advance Advocacy & LCM **IMPERATIVE**

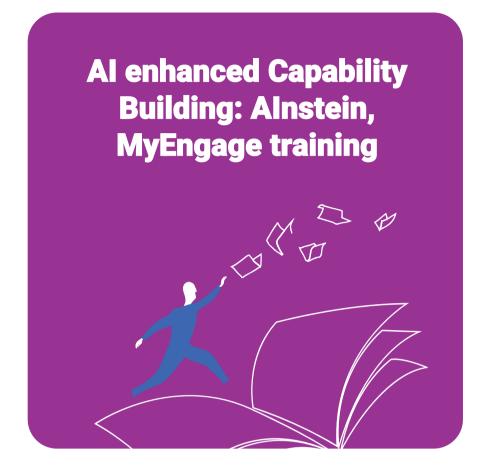


Big 4 Tactical buckets by market archetype













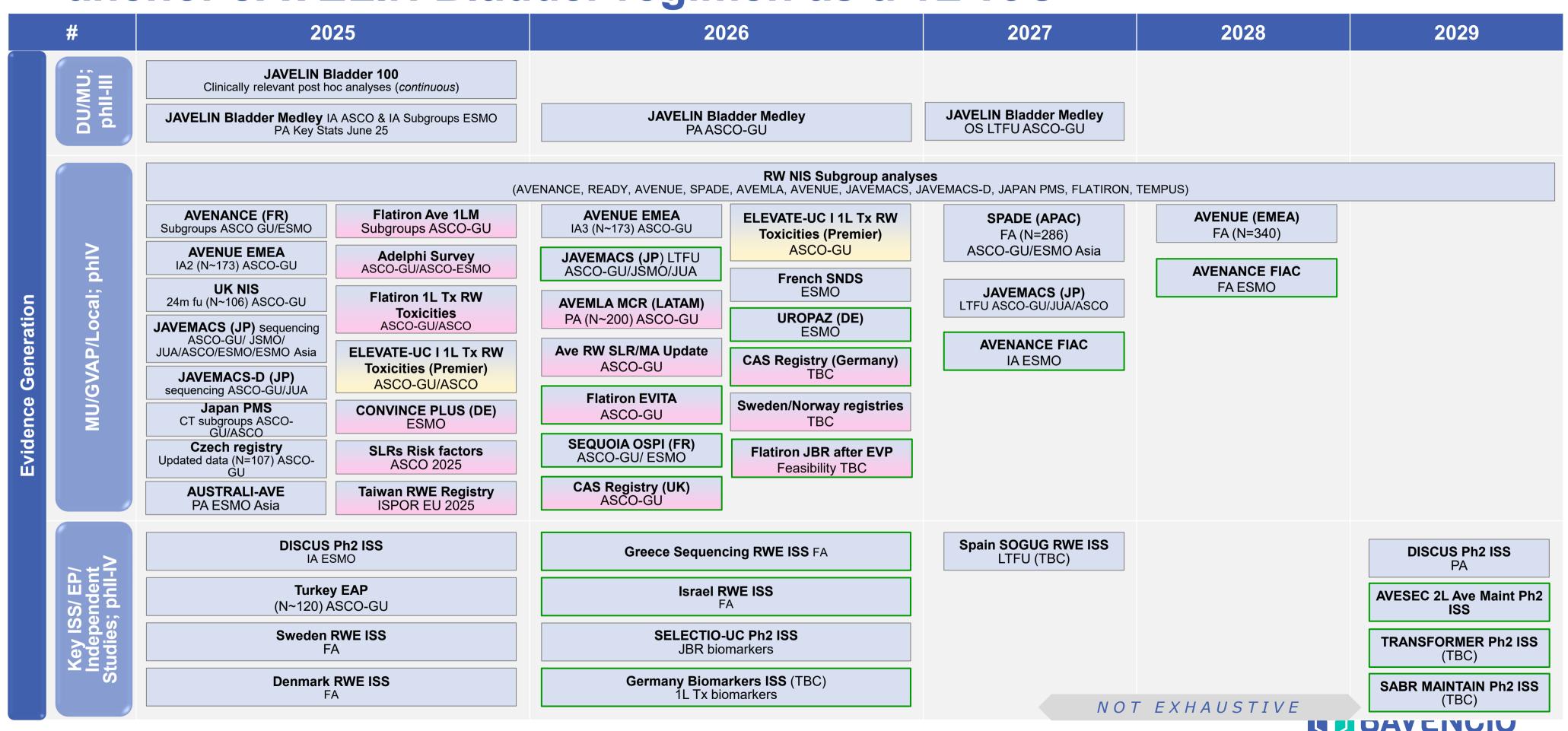






High-level Evidence Generation plan **Overview of Key Tactics** 1. Executive Summary

Robust evidence generation plan to differentiate Bavencio® and anchor JAVELIN Bladder regimen as a 1L ToC



KEY:

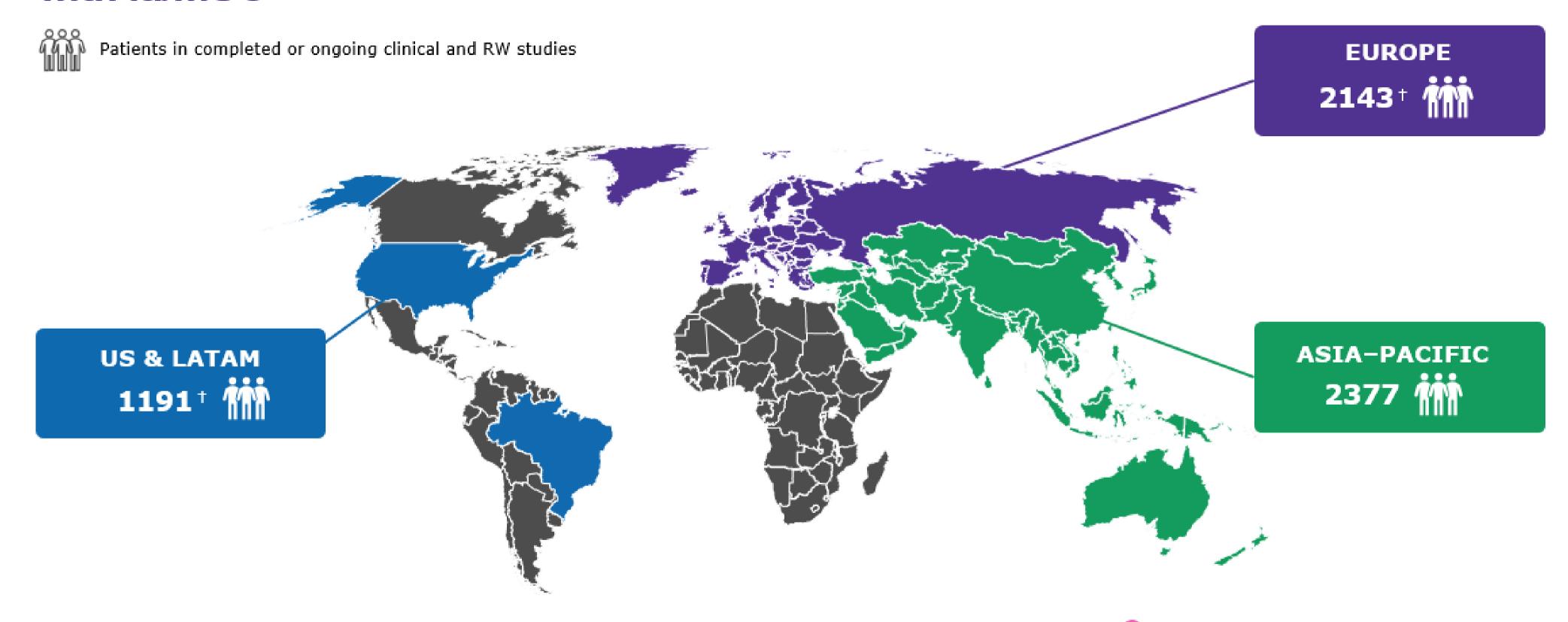
Newly approved study

GVD

NEVD

avelumab

Global RWE for avelumab 1L maintenance* includes >5000 treated patients with la/mUC^{1–37}



Study details of global RWE for avelumab 1L maintenance



List may not be exhaustive of all completed or ongoing studies for avelumab 1L maintenance. Refer to the slide notes for the references.

*In patients who did not progress with 1L PBC.

†Europe and US numbers do not include the N=108 patients from the Bakaloudi study, because patients were reported as a single pooled population, with limited geographical baseline characteristics reported. 1L, first-line; la/mUC, locally advanced/metastatic urothelial carcinoma; PBC, platinum-based chemotherapy; RW(E), real-world (evidence).



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Charlie

All

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Kaj Linna

Recognizing 2 market dynamics to maximize revenue



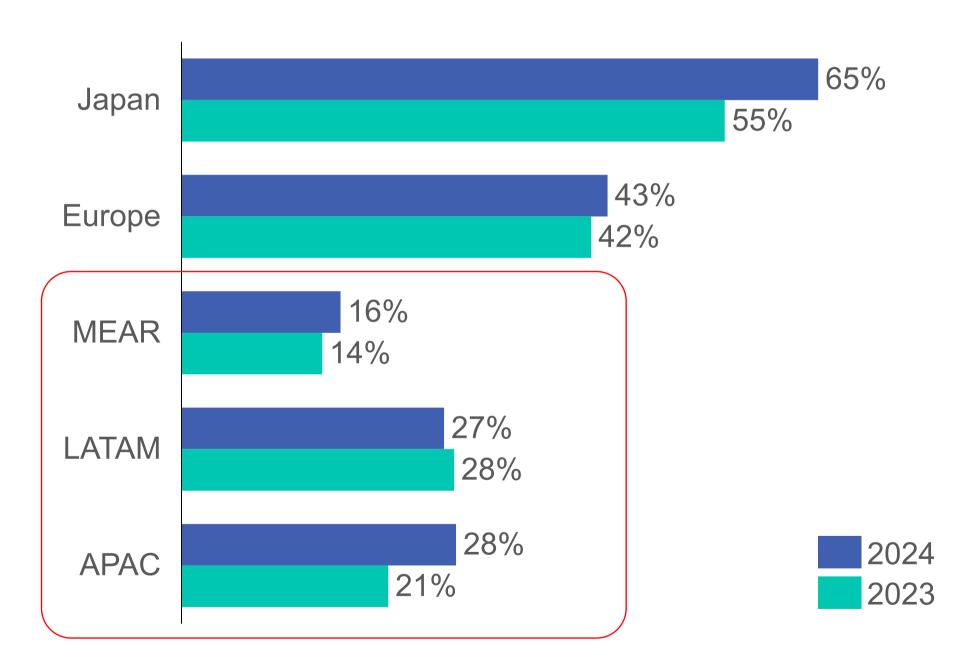


Unlocking Bavencio Growth Potential

There is room to catch up with Erbitux in emerging market

- In Europe, Bavencio accounts for >40% of combined Bavencio + Erbitux sales
- In key emerging markets, Bavencio's share remains significantly lower
- This gap signals untapped growth potential for Bavencio in emerging regions
- Strategic focus on market education, access, and positioning could elevate Bavencio's share toward higher levels

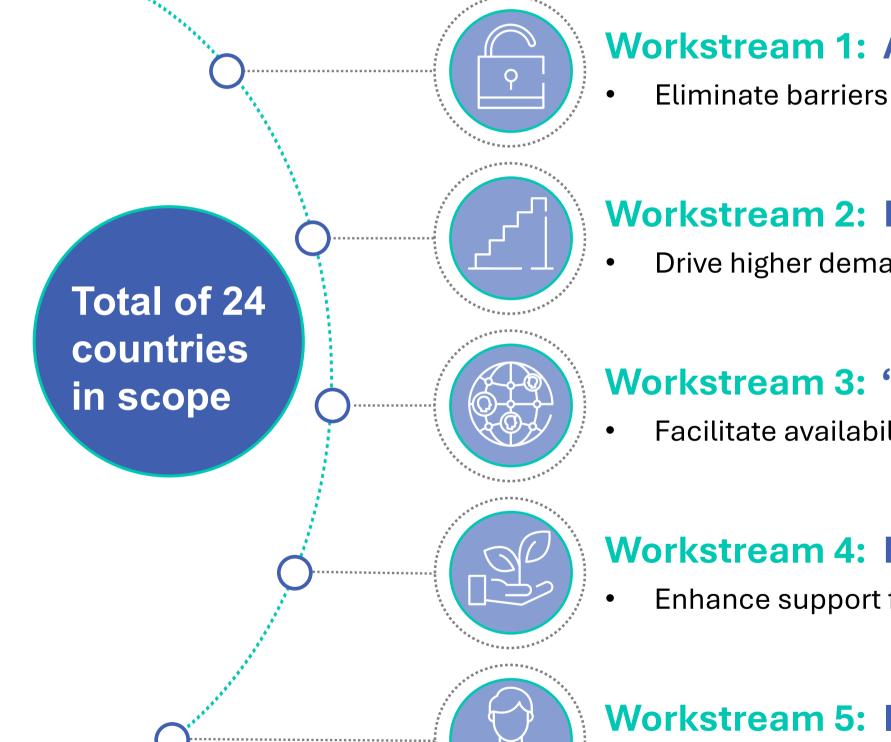
Bavencio Share of Combined Bavencio + Erbitux Sales





BAVENCIO® Growth Workstreams

Five workstreams identified with potential to drive topline growth with minimal incremental OPEX investment



Workstream 1: Access Expansion Potential

• Eliminate barriers to broader reimbursement at an acceptable price

Workstream 2: High Potential Markets

• Drive higher demand from high ASP countries with no immediate EV+P competition

Workstream 3: "Go Deeper" LMIC

• Facilitate availability and access for LMIC countries receiving regulatory approval in <12 months

Workstream 4: New Launch Markets

Enhance support for newly launching markets with regulatory approval in '24/25

Workstream 5: Increase Treatment Rate

• Identify opportunities to increase treatment rates (e.g., MDT, targeting Uro's, 3rd party digital, etc.)

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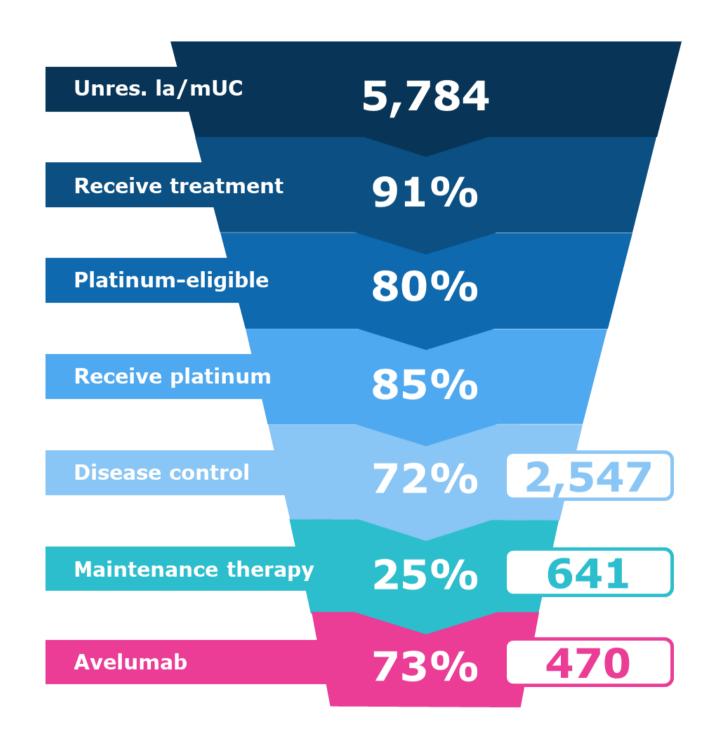
Charlie

All

All

Kaj Linna

UC: size of opportunity is still high



2023	Targets	Dynamics
70%	75%	n/a
85%	85%	n/a
70%	85%	+15 p.
70%	80%	+2 p.
50%	85%	n/a
340	90%	+38%

- Medical effort on platinum results in improved perception
- Still low percentage of qualified patients receive maintenance
- Still significant off-label usage of other IO in maintenance

CR RepCheck w2'24; MDLP; HTA association report; Kaprin et al. 2023



UC: Leadership in all key brand attributes

Allows to achieve the longest median OS

Allows to achieve the longest median PFS

Provides the highest ORR

Provides the highest QoL for patients

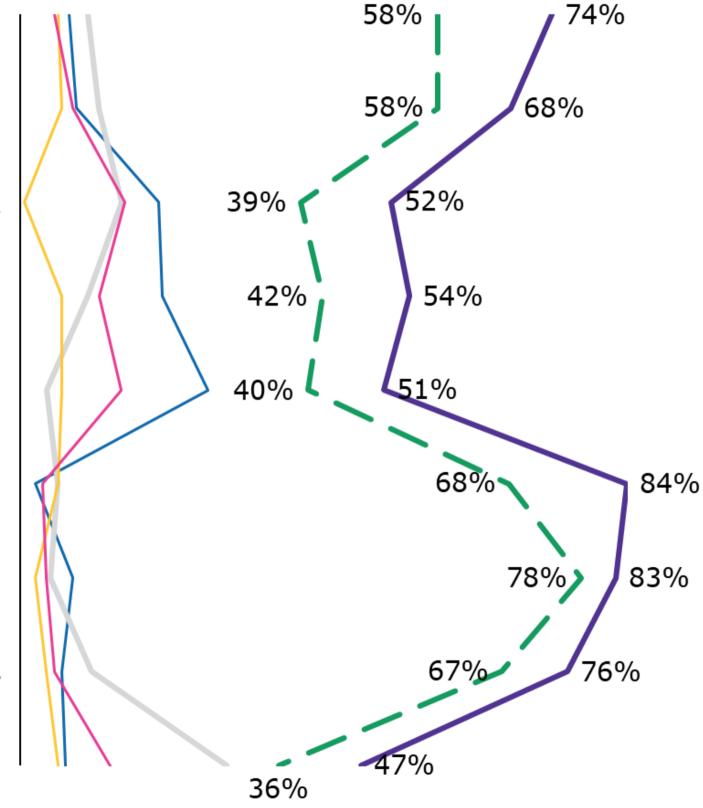
Has the most favorable tolerability profile

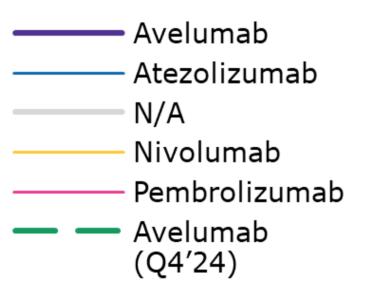
Specialized oncourological drug

The drug of choice in 1L maintenance post-platinum

Allows to achieve mOS over 30 months from the start of PTCT

Allows efficient use of budget funds





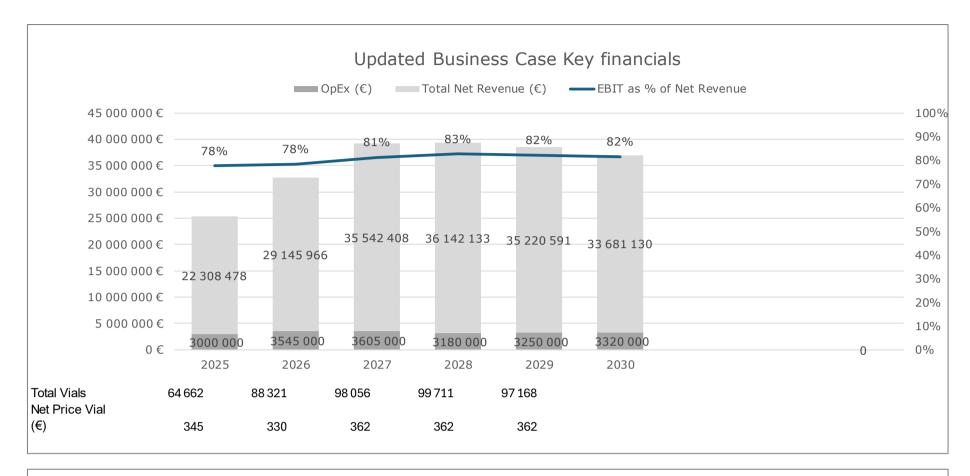


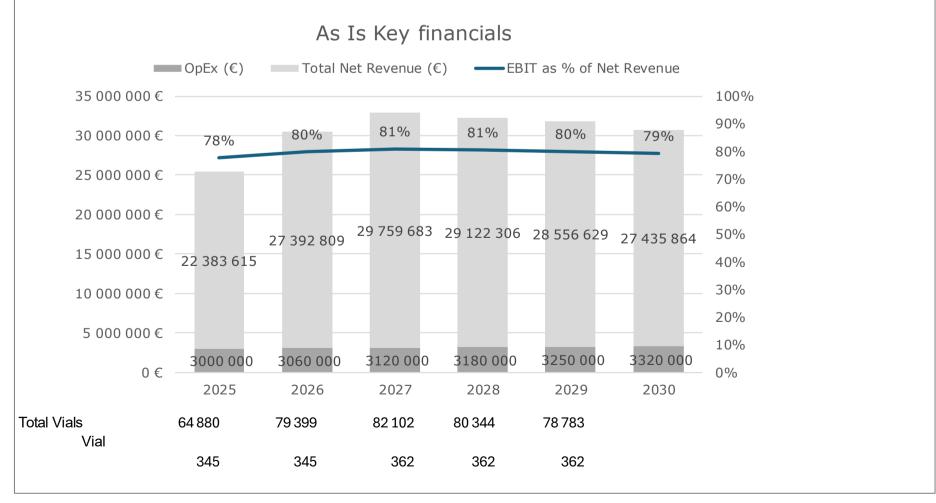
Current State and Growth Opportunities

- In 2025, Bavenio's fourth year of full access in Russia, it will achieve 22.4m EUR and it is supplied to ~150 accounts
- Bavencio is widely accepted by HCPs as a SoC in UC and leads across all efficacy and safety attributes. It also grows its presence in RCC with 12% market share
- With National Oncology Program budget expected to be flat in the following 3 years, growth of the brand will slow
 down significantly with the current promotional model
- Russian oncology team sees the opportunity to boost Bavencio sales in 2022-30 with the following levers:
 - wide preceptorship programs in major national and international centers to 100 HCPs from regional hospitals to boost confidence in JB 100 regimen
 - o implement regional follow-up programs to stop patient leakage in geographically spread regions
 - o expand and design higher-flexibility Co-Financing Program to increase availability in hospitals
 - implement a series of market access programs to achieve full access in Moscow City and drive adoption in other large regions with low usage of Bavencio
- 2026 is the year of opportunity as EV will obtain full national access in 2027, and Astellas has registered its price at 50,000 RUB/vial (resulting in +26%to Bavencio's annual cost of treatment) leading to higher competition in UC
- With additional annual investment of 485k EUR in '26 and '27 we see an opportunity to increase Bavencio access and deliver additional ~28m EUR from '26 to '30



Financial Impact: +27.5m EUR in Sales over five years







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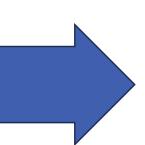
Kaj Linna

Türkiye Bavencio Ambition

Growth & Opportunity

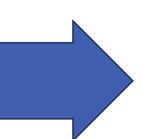
As-is Scenario

- Indicated and reimbursed for PD-L1(+) patients
- Main bottleneck confirmed by market research and field insights:
 - 1) PD-L1(+) ratio: 50%
 - 2) 10% improvementspace in maintenanceadoption rate



Proposed Scenario

- To register and get
 reimbursement for
 allcomers
 (Reimbursement approval
 in 2028*)
- Meanwhile, testing support at a center of excellence** in 2026 & 2027



	2025	2026	2027	2028	2029	2030
PDL(+) ratio	59%	65%	70%	100%	100%	100%
Maintenance adoption rate	80%	85%	90%	90%	90%	90%
Incremental sales (M€)		1,0	1,9	3,9	6,2	7,0

Additional 20 M€ sales in 5 years on

top of as is trend

Icremental
OPEX:Incremental
Sales is 1:6



^{*}Anticipated timeline needs to be confirmed with global team
**Needs global approval and evaluation by local compliance

Türkiye Bavencio Ambition

Patient Flow w/ Testing Optimization & Label Update

Testing support in 2026-2027 & Reimbursement for expanded Bavencio label in 2028 & No EVP Reimbursement

Assumption	2025	2026	2027	2028	2029	2030
1L UC Population (Incident & Newly Recurrent)	2.867	2.953	3.042	3.133	3.227	3.324
% Ineligible (IO in Adj/clinical trials)	5%	5%	5%	5%	5%	5%
Treatment Rate (%)	95%	95%	95%	95%	95%	95%
PDL testing rate	85%	85%	85%	100%	100%	100%
PDL positivity rate	59%	65%	70%	100%	100%	100%
% Treated With IO Free Platinum Induction	95%	75%	70%	70%	70%	70%
% of Patients with CR, PR or SD (disease control on CT)	83%	83%	83%	83%	83%	83%
% of CR, PR or SD Who Receive IO Maintenance (without access limitation)	80%	85%	90%	90%	90%	90%
Bavencio Share of IO Maintenance Treated Patients (without access limitation)	82%	84%	86%	88%	88%	88%
Access %	100%	100%	100%	100%	100%	100%
Bavencio Net Share (Share of 1L Treated Patients)	26%	25%	27%	46%	46%	46%
New Bavencio Treated Patients	671	654	734	1301	1340	1380
Total Bavencio Treated Patients	769	908	1055	1651	1928	2098



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Kaj Linna

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Algeria GoDeeper initiative

- Improve Bavencio Access
- Conduct Local Cost effectiveness Study
- Workshop with hospital pharmacists and PCH heads highlighting the costs effectiveness of Bavencio
- → unlock PCH budget limit barriers
- Maximize centers adoption of maintenance regimen and setting BAVENCIO as the SOC for UC
- Top centers experts meeting to maximize maintenance regimen adoption and Bavencio forecast to optimize PCH Allocation
- Strengthen Merck SAFRO partnership to be the partner of choice to improve UC, RCC & MCC cancer management in Algeria
- Cement BAVENCIO value proposition through Local data generation & accelerate BAVENCIO Launches for RCC & MCC indications
- Set up a Local Study to drive local evidence generation to support use of BAVENCIO in 1L la/mUC
- RCC & MCC Ad Boards & Expert meetings to Gather Local Insights for RCC & MCC (Current treatments & unmet needs)
- → Include Bavencio in RCC & MCC Local Guidelines

1L UC Population
1455
(77% treatment rate)

% Treated With IO Free Platinum Induction 66 % (74% Platinum eligible & 89% Systemic ttt)

% of Patients with CR, PR or SD (65 %)

% of CR, PR or SD Who Receive IO Maintenance (82 %)

Bavencio Access

BAVENCIO® total
Treated patients
354

DoT 8.5

+30% sales growth

+200 BAVENCIO newly

treated patients

versus base case scenario



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UC in Egypt Go Deeper LMIC Workstream



Overview

- BC stands as the 3rd most prevalent in Egypt.
- Being low-middle income country, access to medication is the main challenge for the patients representing by maximum about 15% in high-cost medications.
- More than 80% of the patients are treated in the MOH/NHO sector (public sector).
- The Governmental (Presidential) Initiatives started to build treatment protocols for some cancer types in focus.
- UC was not used to be one of their focus cancer type.



Establishing New UC Policy

2026

To implement comprehensive, nationwide programs for bladder cancer **diagnosis** and **treatment**, integrate advanced medical technologies and treatment protocols, and enhance healthcare infrastructure and workforce capacity.

Process

Alignment Patient **Project** Effectiveness & with PI Journey initiation pricing model Director survey Reimbursement in Public Sector Merck's Cost of **Advisory** Official role & Illness **Board Proposal** proposal



Pillars



Establish a National BC Registry



Strengthening Early Detection and Diagnostic Capacity



Enhance MDT Collaboration



Ensuring Fair Pricing of Innovative Treatments



Optimize Patient Journey Beyond Medication



Number of Patients

Go Deeper As Is

Ambition



1000+ patients will receive Bavencio within 5 years.

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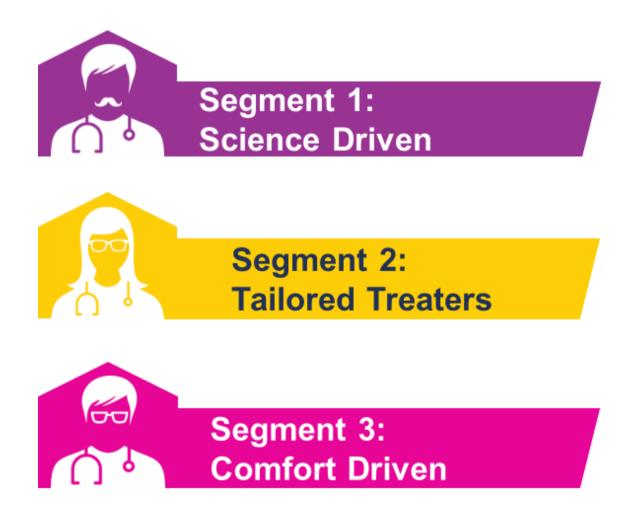
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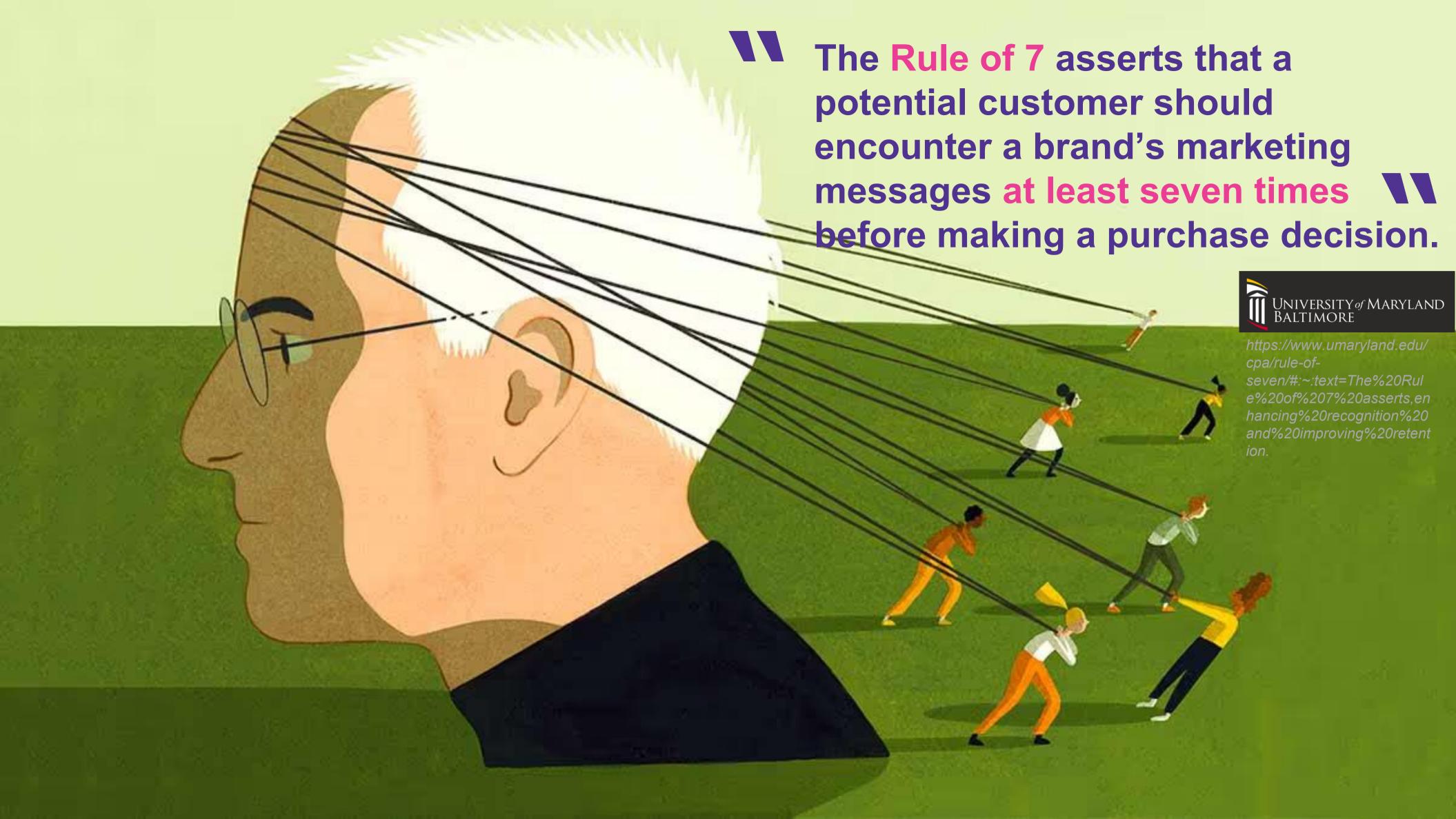
Kaj Linna All

What is the best time to launch Bavencio behavioral segmentation & establish Bavencio in key patient profiles?

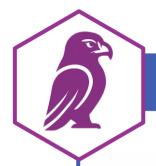
- 1. Today
- 2. 9-12 months before EV-302 launch & reimbursement.
- 3. 3-6 months EV-302 launch & reimbursement







Tailor conversations based on HCP's intrinsic attitude & motivation to achieve impactful engagements & call to action



SCIENCE DRIVEN



TAILORED TREATERS

"Information gatherers"

COMFORT DRIVEN

"Motivated by familiarity"

Low awareness of novel data

- Generalist approach to treatment
- Mostly office-based/community settings
- Driven by experience and/or convenience – may avoid complex regimens, AE management, or burden on staff
- Comfortable with established drugs (e.g., CT, nivo); low EV+P familiarity

"Driven by efficacy"

- Attend conferences, involved with clinical trials
- HCP-led approach to treatment
- Mostly in academic/institutional settings with support staff & MDTs
- **Driven by efficacy** & confident to manage toxicities
- Advocate for EV+P to peers

Aware of recent data and guidelines

- Algorithmic approach to treatment
- Mostly in large non-academic centers
- Driven by QoL, tailor approach based on patient needs, attributes and/or support network
- Balance benefit/risk
- Interested in EV+P, may/not advocate

Medical Priority

Commercial priority

MARKET FRAGMENTATION



- Carve out **patient profiles** for JBR
- Drive discussion on precision medicine (i.e., nectin-4)
- Foster treatment individualization and sequencing in context of evolving landscape

CUSTOMER RETENTION FOR THE MAJORITY OF PATIENTS

- Expand patient pool by focusing on ~30 months of mOS* from 1L CT, RWE-based sequencing and personalized treatment
- Consistency of JBR & multiple RWE in efficacy & safety
- Raise the bar with maximizing
 1L JAVELIN Bladder regimen share
- Carve out niche for EV+P

1L=first-line; **AE**=adverse event; **CT**=chemotherapy; **EV+P**=enfortumab vedotin + pembrolizumab; **HCP**=healthcare professional; **JBR**=JAVELIN Bladder regimen; **MDT**=multi-disciplinary team; **mOS**=median overall survival; **nivo**=nivolumab; **QoL**=quality of life; **RWE**=real-world evidence. See footers in speaker notes.

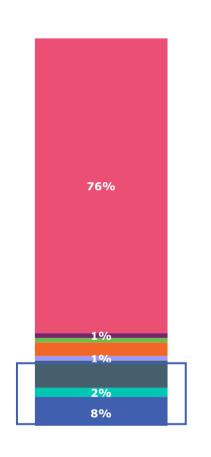


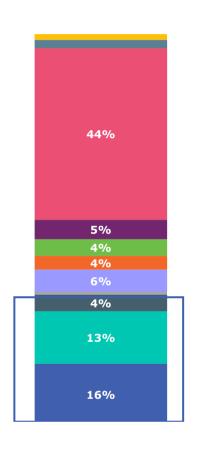
HCP Behaviour Segments work!



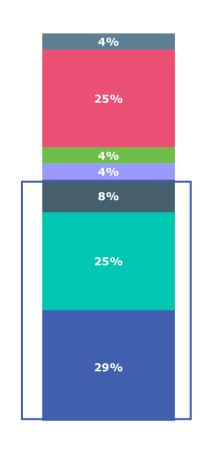
■ Cisplatin-CT

(+/- gemcitabine)





Initial 1L treatment (% of patients)















Focusing our efforts on winnable segments will drive topline efficiency & behavior change



Customer journey to maximize impact and engagement

PROCESS



CustomerJourney

Identify all potential touchpoints with a customer based on where & how they engage with scientific data relating to Bladder cancer



Key Messages

Establish the key message journey required by HCP segment to drive behavioural change towards a personalized treatment approach to meet patient needs for quality survival



Channel

Based on the customer journey **identify the channels** best suited to **deliver and reinforce the message** journey



Content Plan

Develop a content plan based on the defined omnichannel journey to reach the customer with the right message through the best channel at the right time



Omnichannel

Execute an omnichannel communication strategy to maximize the uptake of BAVENCIO in the patient population who can most benefit based on the country archetype

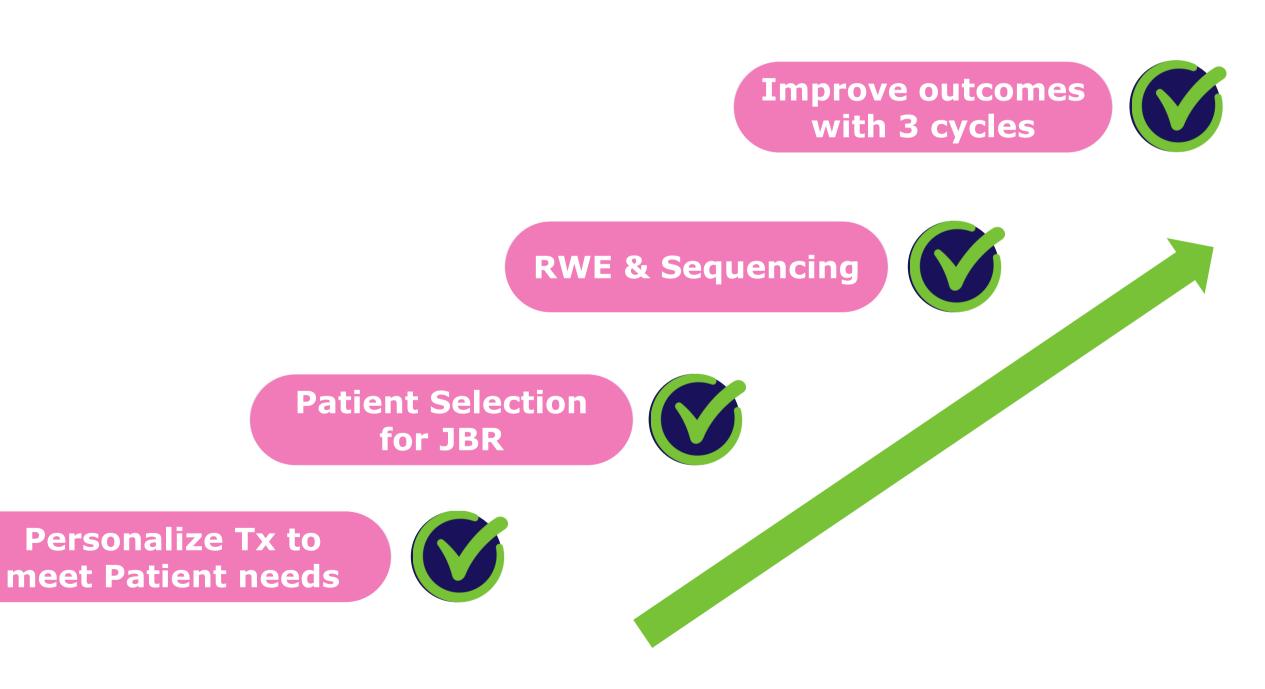


Objective: Personalize treatment choice to meet Patient Needs

SCIENCE DRIVEN



Selects treatment based on efficacy



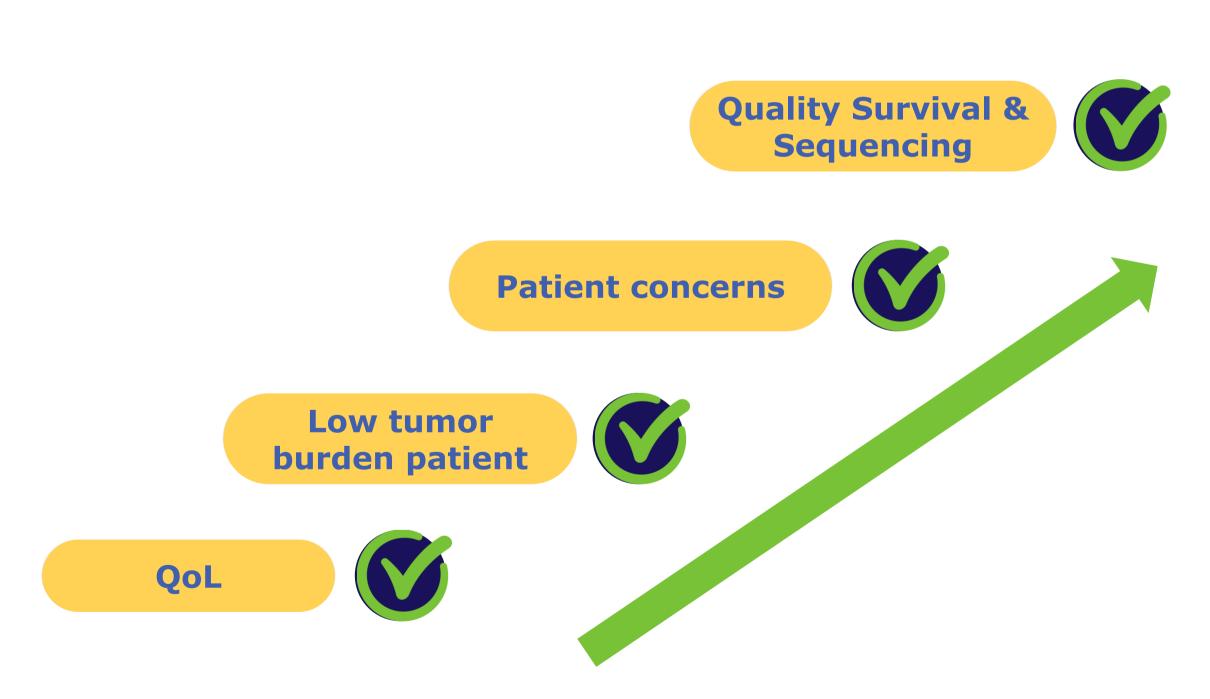


Objective: Embed Quality Survival as primary treatment objective

TAILORED TREATERS



Considers Patient Needs in Treatment choice



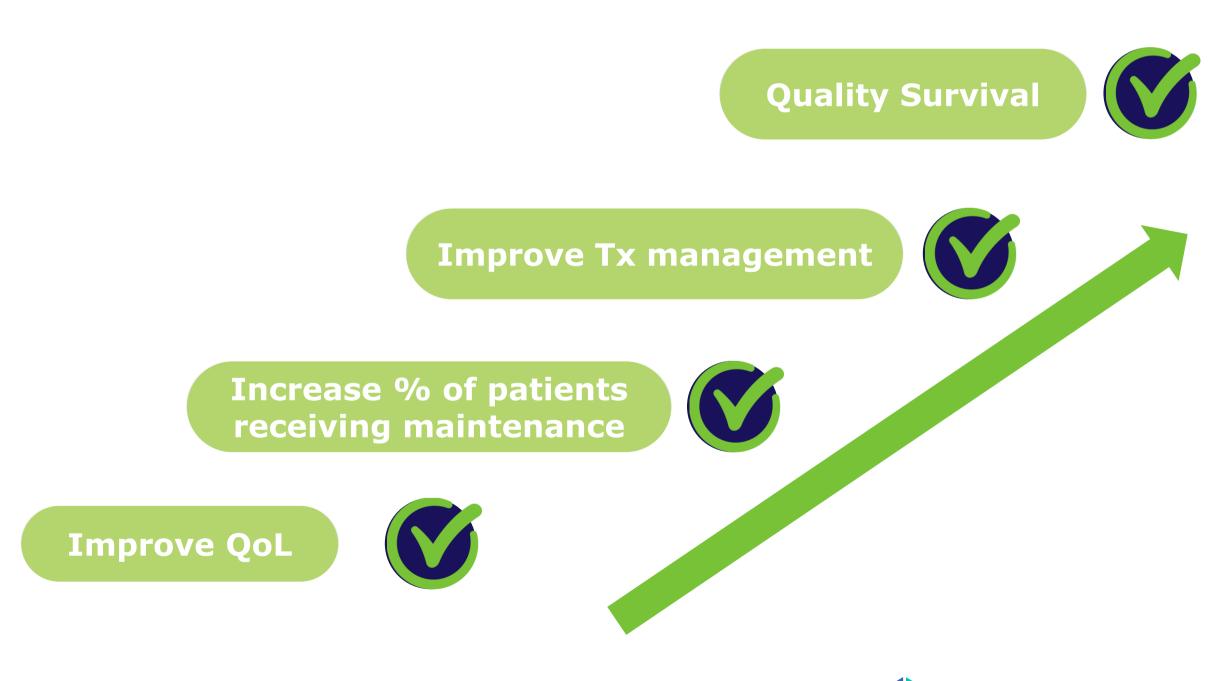


Objective: Improve patient management with deintensified JBR

COMFORT DRIVEN



Selects treatment based on experience



DAY 3

WE ARE UNSTOPPABLE MEAR GoDeeper with Bavencio



5 mins 20 mins 10 mins

10 mins 10 mins 10 mins

10 mins

10 mins 10 mins 10 mins

5 mins 5 mins 5 mins 20 mins

10 mins

Opening and obj

Cance

Strategy and Performance: Bavencio in UC
Bavencio growth workstreams

Bavencio Ambition

- · Russia ambition
- Turkey ambition

Q/A

Coffee break

New Launch Markets workstream: Algeria Go Deeper' LMIC workstream: Egypt Q/A

When to kick-off Bavencio behavioral segmentation

- · Why it is important?
- Optimal timing to start? (Voting)
- Discussion

Establishing UNSTOPPABLE LAUNCH with Bavencio:

Lessons learned and insights

Closing

Mohamed and Harshveer

Amr, Harshveer, Mohamed and Niklas Tanguy

Moderator: Mohamed
Panel: Amr, Charlie & Tanguy
Russia and Turkey

Moderator: Mohamed and Ihab Panel: Amr, Tanguy, Charlie North Africa and Egypt

Charlie

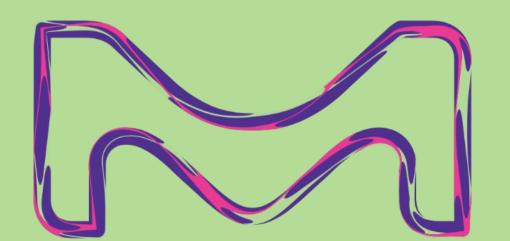
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Kaj Linna

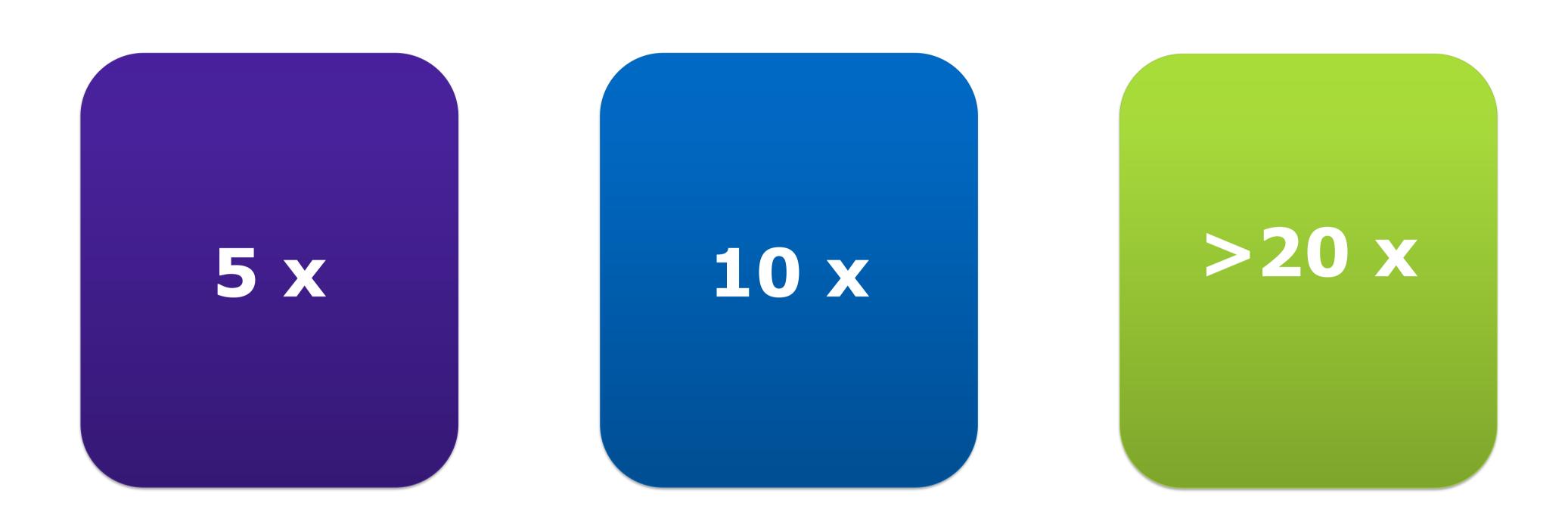
Establishing UNSTOPPHBLE LAUNCH WITH Bavencio

Sep 24, 2025



MERCK

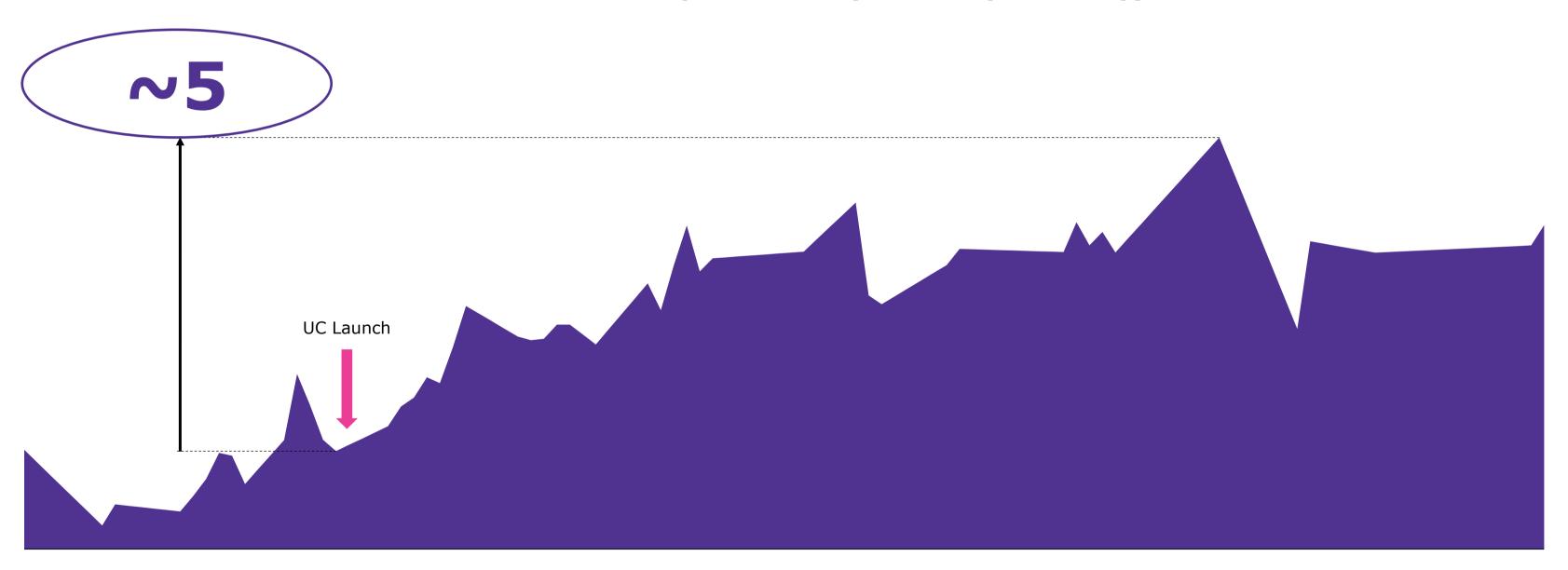
What is your ambition with BAVENCIO UC launch?





Successful BAVENCIO UC launch?





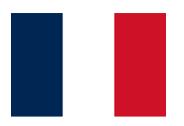


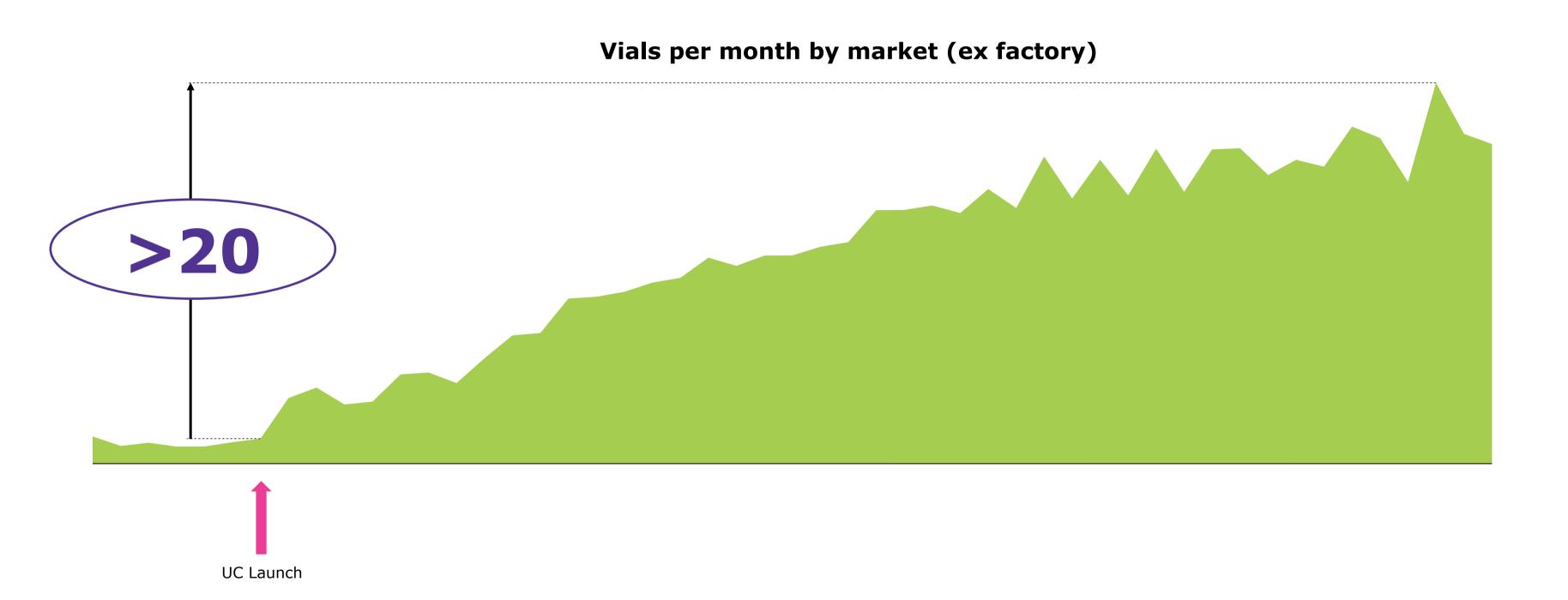
Successful BAVENCIO UC launch?





Most successful BAVENCIO launch to date

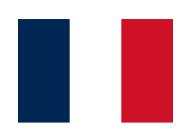




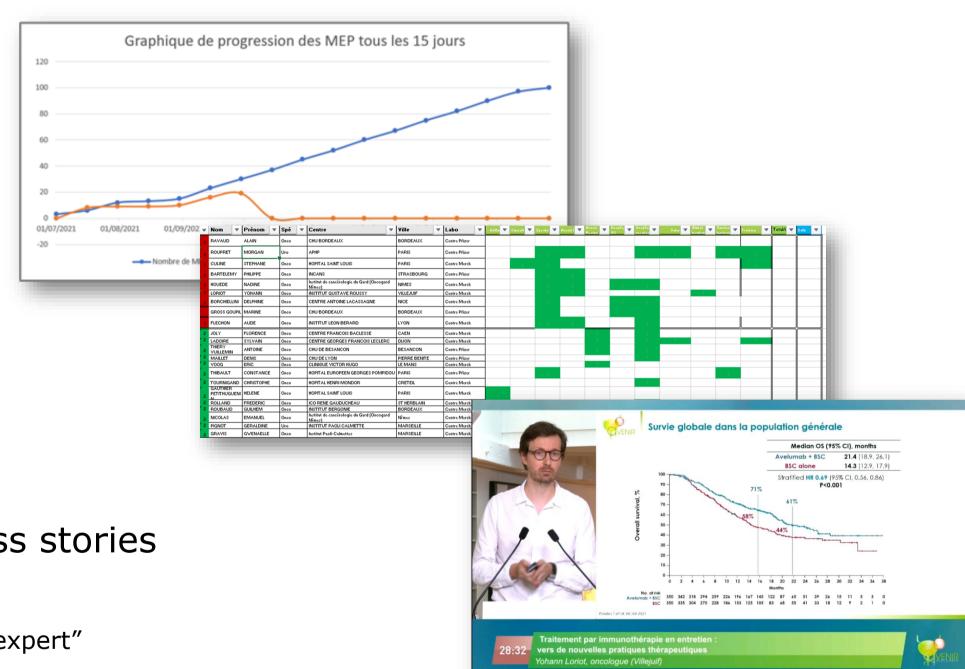


Learnings

Why was BAVENCIO UC launch was a success in FRANCE?



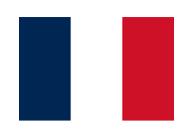
- Early Access
- KTL engagement
 - Data generation (AVENANCE)
 - Guidelines
 - KOL plan
- P2P cascade
 - National SAM "Avenir"
 - More than 30 local events "Onco Vessie"
 - Therapy Management & Sharing success stories "Grand Reporter Vessie"
 - Regional round table meetings "Meet-the-expert"
- FFE
 - Resourcing & Targeting adherence

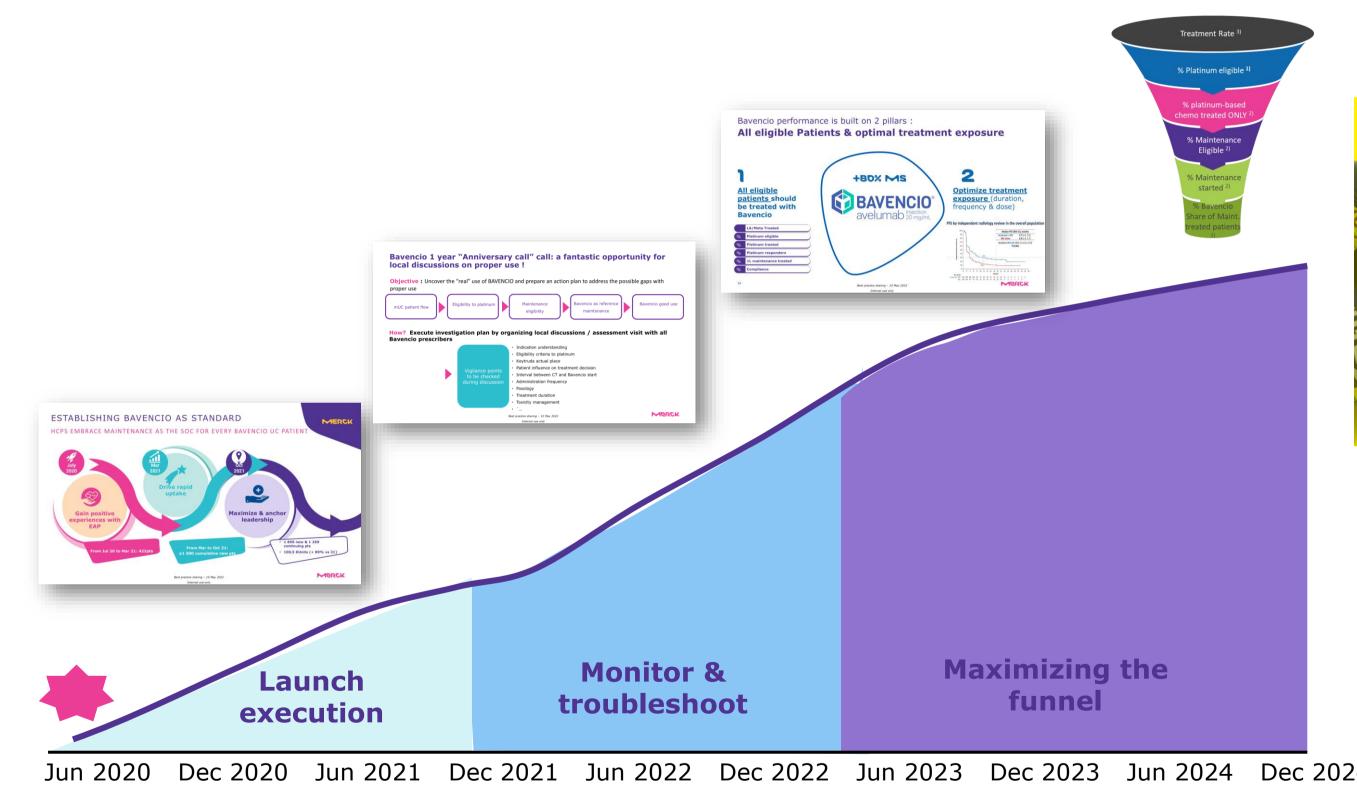




Learnings

What made French performance exceptional?



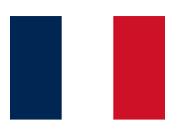






Learnings

What made French performance exceptional?



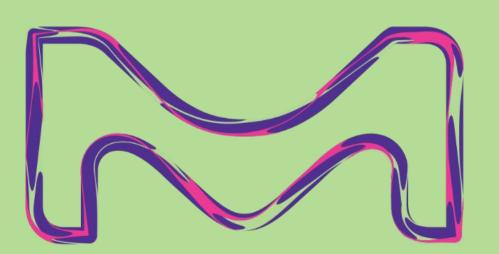








WEareunstoppable

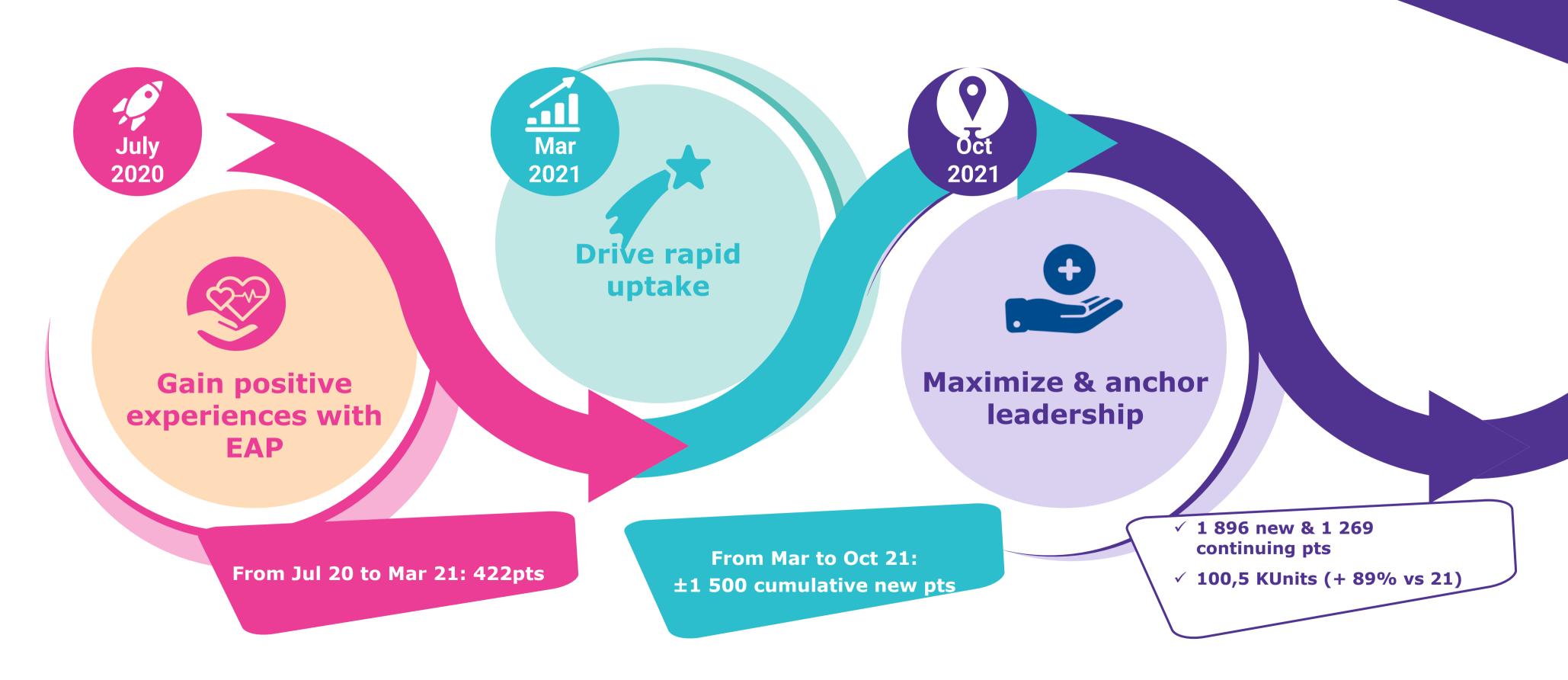


MERCK

ESTABLISHING BAVENCIO AS STANDARD



HCPS EMBRACE MAINTENANCE AS THE SOC FOR EVERY BAVENCIO UC PATIENT





Bavencio performance is built on 2 pillars:

All eligible Patients & optimal treatment exposure

All eligible
patients should
be treated with
Bavencio

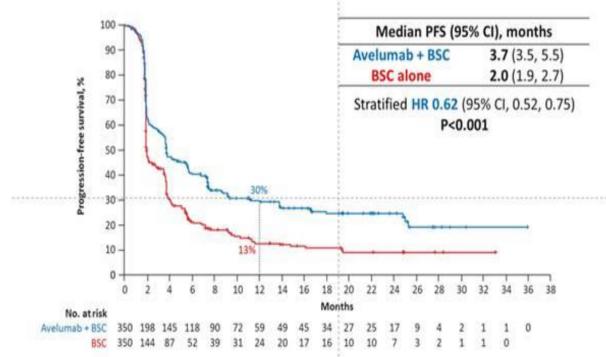




2

Optimize treatment exposure (duration, frequency & dose)

PFS by independent radiology review in the overall population



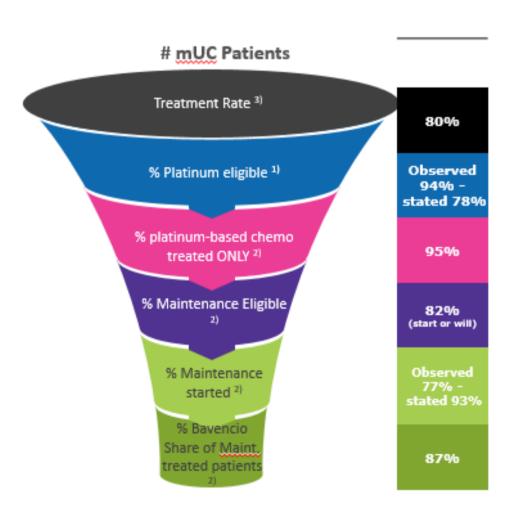


Tracker and sales dynamic

TRACKER A+A

SALES units

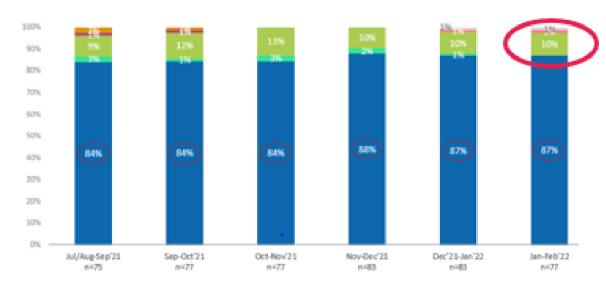
mUC Patients

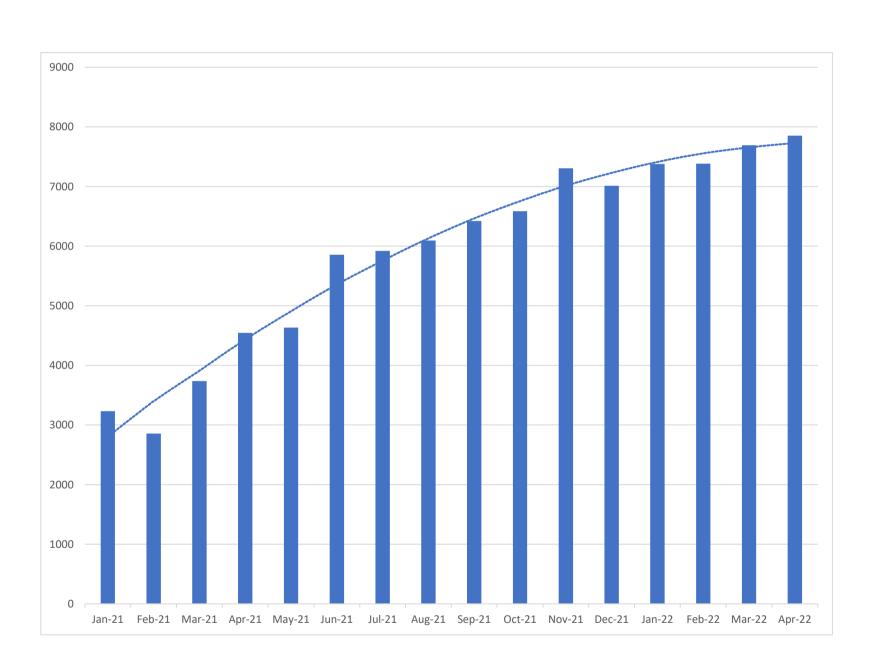


Maintenance treatment

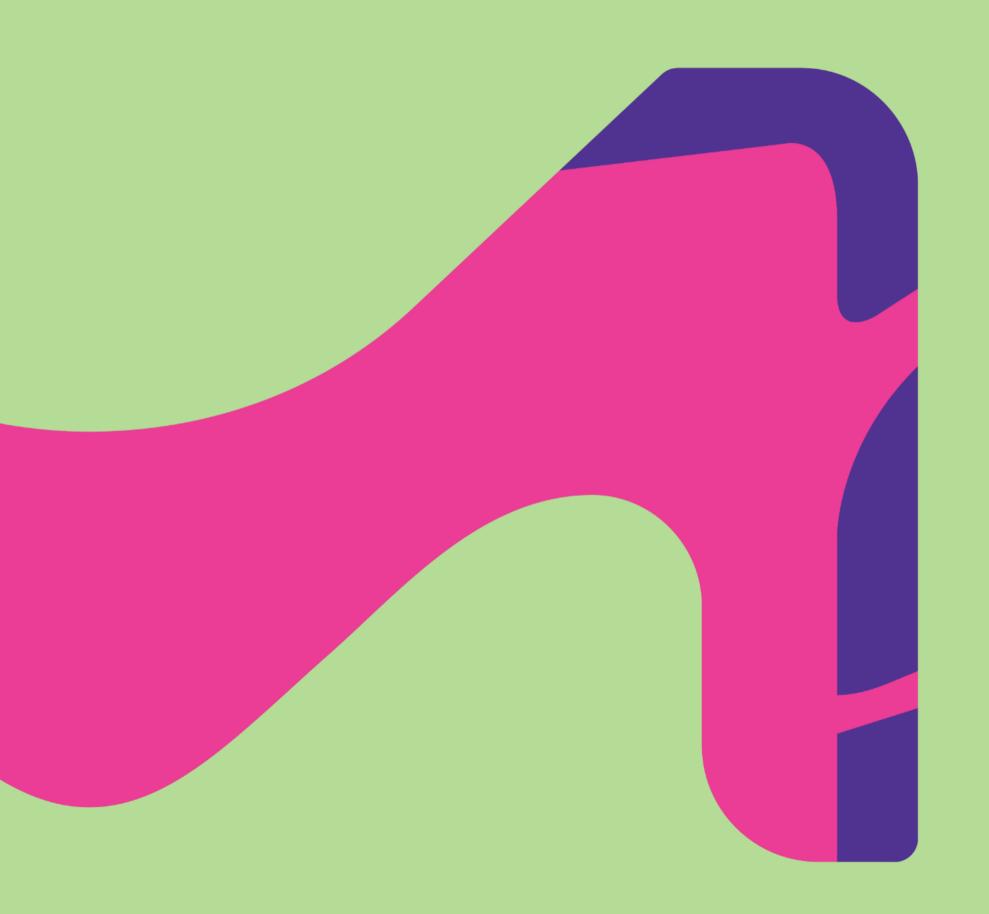


Bavencio MS









1 year anniversary call

training document

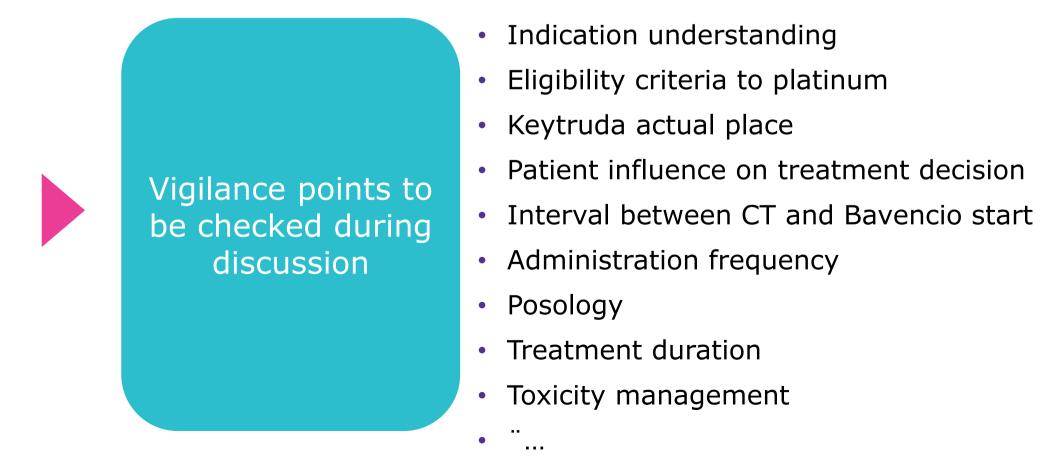


Bavencio 1 year "Anniversary call" call: a fantastic opportunity for local discussions on proper use!

Objective: Uncover the "real" use of BAVENCIO and prepare an action plan to address the possible gaps with proper use



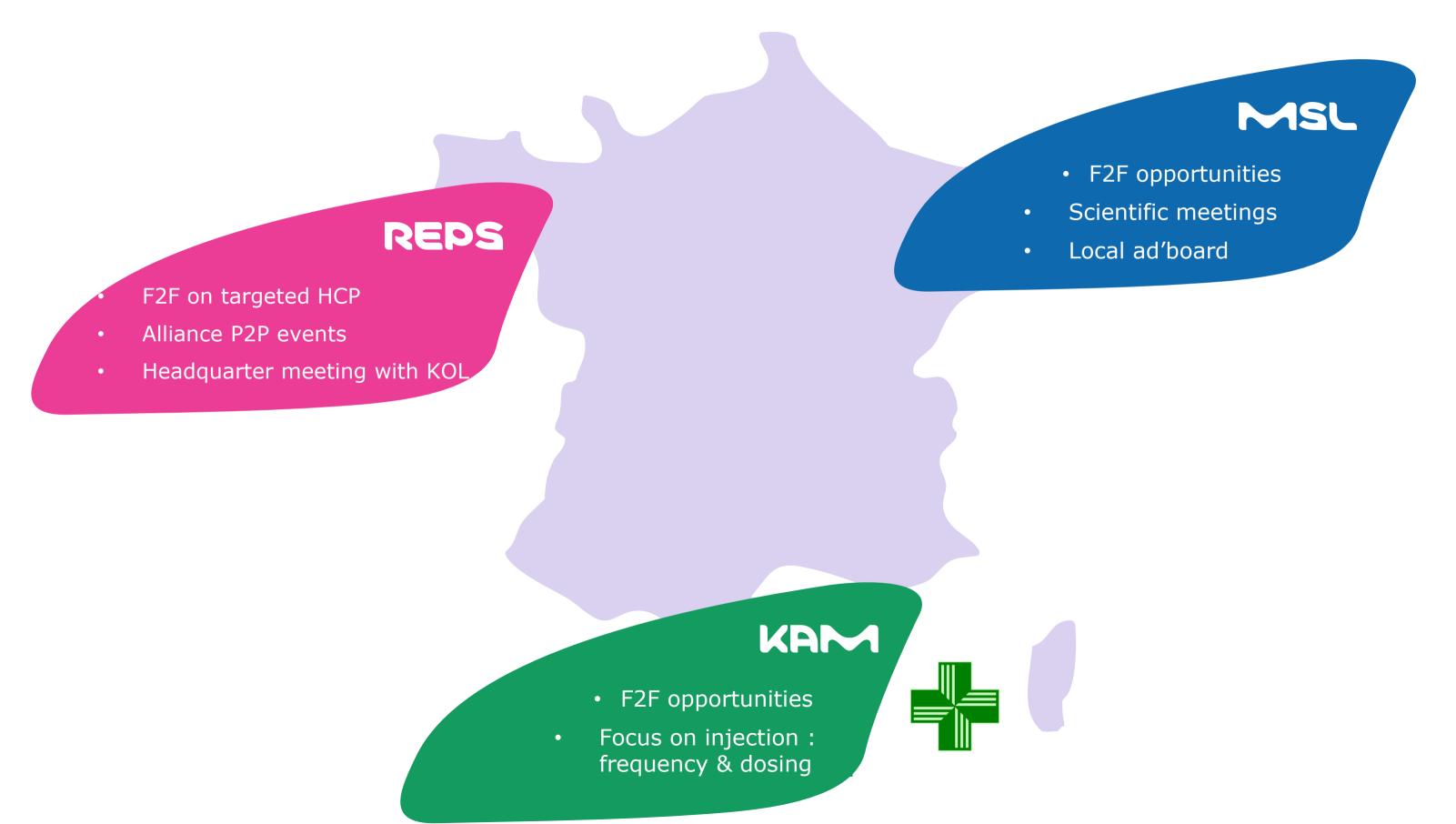
How? Execute investigation plan by organizing local discussions / assessment visit with all Bavencio prescribers





"Anniversary call":

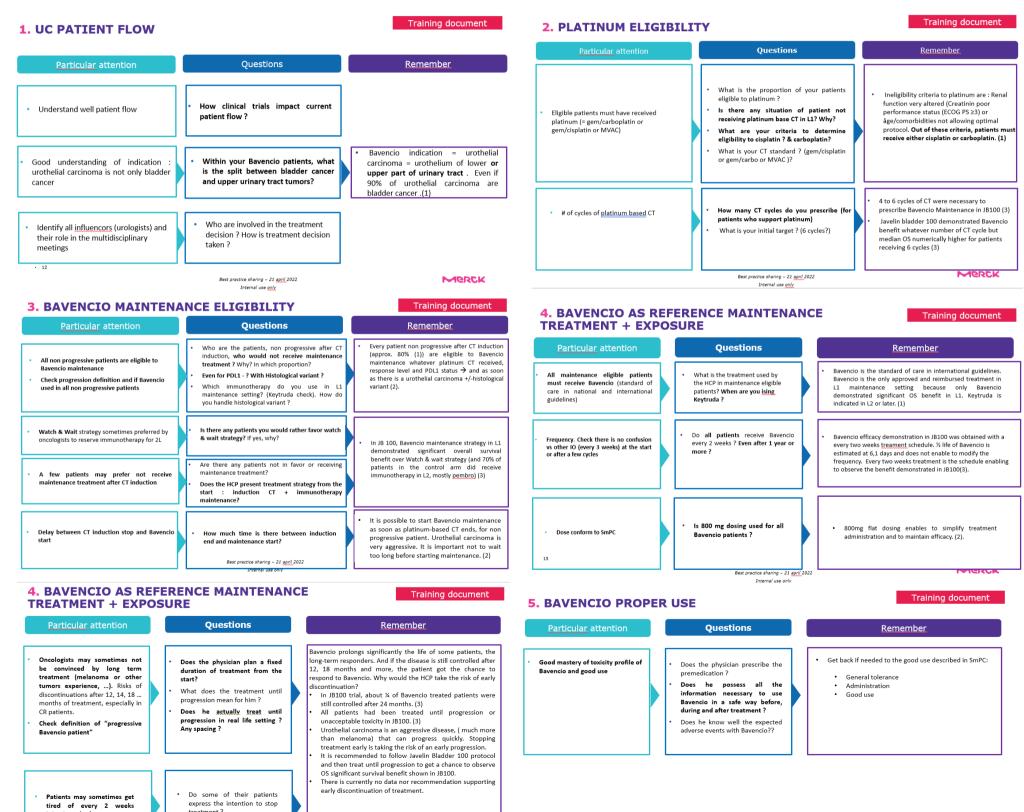
A cross functional initiative: 360° everywhere





Training document (available in english)

Extensive list of particular attentions and questions to HCPs



For all themes training document includes:

Knowledge Questions Focus What the rep To have in mind The questions have to know to before asking to ask to the address if question to HCP **HCPs** necessary



Internal use only

Training material

Examples of particular attentions and questions to ask to HCPs

Particular attention

- Good understanding of indication : urothelial carcinoma is not only bladder cancer
- Eligible patients must have received platinum (= gem/carboplatin or gem/cisplatin or MVAC)
- All non progressive patients are eligible to Bavencio maintenance
- Check progression definition and if Bavencio used in all non progressive patients
- Frequency. Check there is no confusion vs other IO (every 3 weeks) at the start or after a few cycles
- Oncologists may sometimes not be convinced by long term treatment Risks of discontinuations after 12, 14, 18 ... months of treatment, especially in CR patients.

Questions

- Within your Bavencio patients, what is the split between bladder cancer and upper urinary tract tumors?
- Is there any situation of patient not receiving platinum base CT in L1? Why?
- What are your criteria to determine eligibility to cisplatin? & carboplatin?
- Who are the patients, non progressive after CT induction, who would not receive maintenance treatment? Why? In which proportion?
- Even for PDL1 ? With Histological variant ?
- Even for patient with CR after CT
- Do all patients receive Bavencio every 2 weeks? Even after 1 year or more?
- Does the physician plan a fixed duration of treatment from the start?
- Does he actually treat until progression in real life setting? Any spacing?

Remember

- Bavencio indication = urothelial carcinoma = urothelium of lower or upper part of urinary tract.
 Even if 90% of urothelial carcinoma are bladder cancer.(1)
- Ineligibility criteria to platinum are: Renal function very altered (Creatinin poor performance status (ECOG PS ≥3) or âge/comorbidities not allowing optimal protocol. Out of these criteria, patients must receive either cisplatin or carboplatin. (1)
- Every patient non progressive after CT induction (approx. 80% (1)) are eligible to Bavencio maintenance whatever platinum CT received, response level and PDL1 status -> and as soon as there is a urothelial carcinoma +/-histological variant (2).
- Bavencio efficacy demonstration in JB100 was obtained with a every two weeks treament schedule.
 ½ life of Bavencio is estimated at 6,1 days....

Bavencio prolongs significantly the life of some patients, the long-term responders. And if the disease is still controlled after 12, 18 months and more, the patient got the chance to respond to Bavencio. Why would the HCP take the risk of early discontinuation?