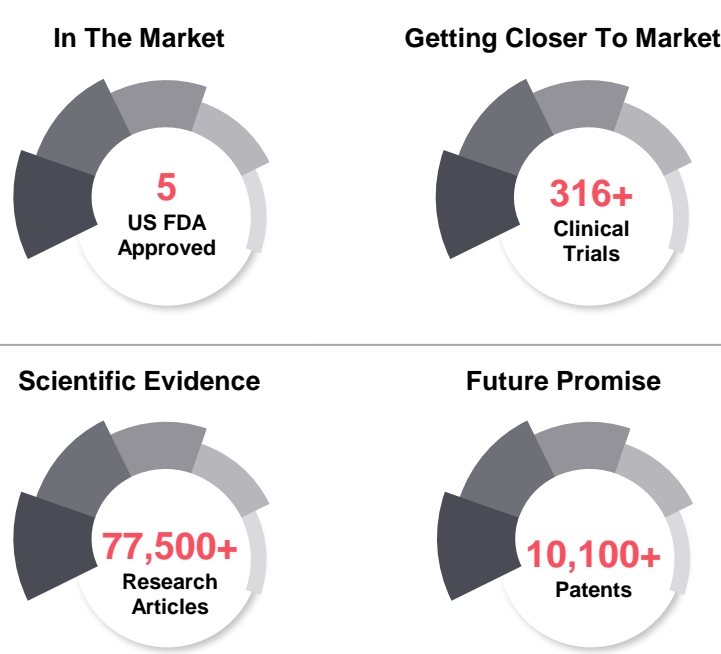


TPDs – POTENTIAL TO TURN UNDRUGGABLE TO DRUGGABLE

Oncology & Beyond

TPD's Rise - Unleashing Untapped Potential

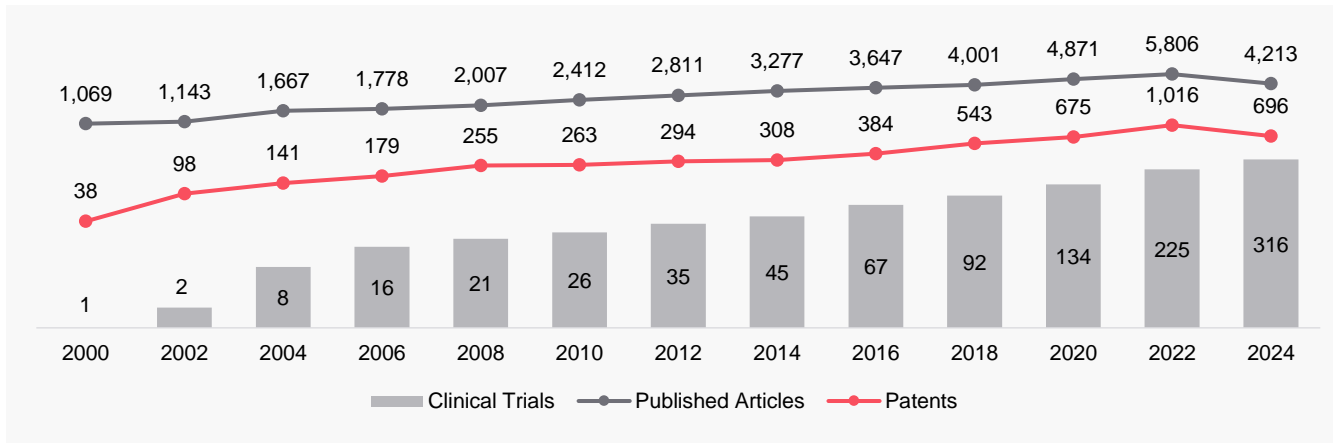
- **Approvals using TPD Strategies**
To date, two SERDs in BC and three IMiDs in MM have been approved
- **Rising Clinical Activity**
A massive growth of 40%+ (CAGR) in the last 5 years
 - ~2/3rd of TPD clinical programs are in early phase
 - Quick transition from research to clinic, with PROTACs within a decade of 1st literature appearance
- **Double-digit Growth in Scientific Publications**
In last 5 years, the publication volume increased at a CAGR of 14%
- **Substantial Growth in Patent Generation**
In last 5 years, the patent volume increased at a CAGR of 18%



Source: Lens.org, Clinicaltrial.gov, US FDA, FutureBridge Analysis
Abbreviation: BC: Breast Cancer, IMiDs: Immunomodulatory Drugs, MM: Multiple Myeloma, PROTACs: PROteolysis TArgeting Chimeras, SERDs: Selective Estrogen Receptor degraders

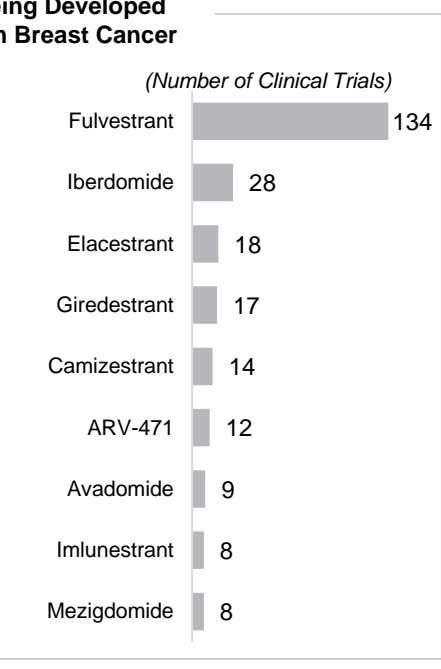
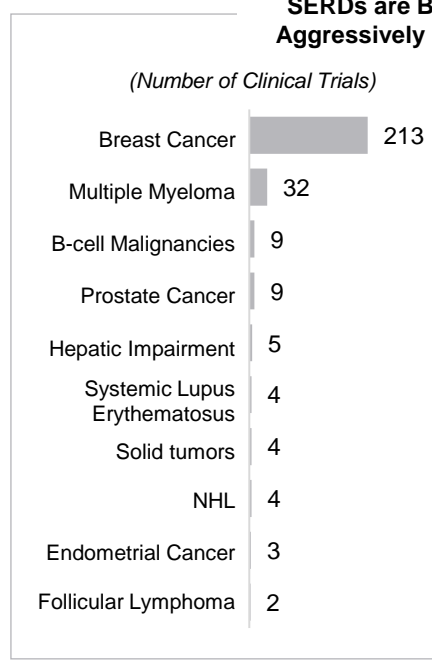
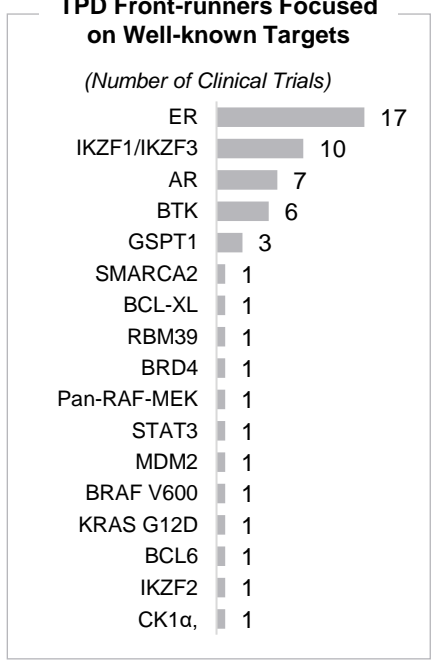
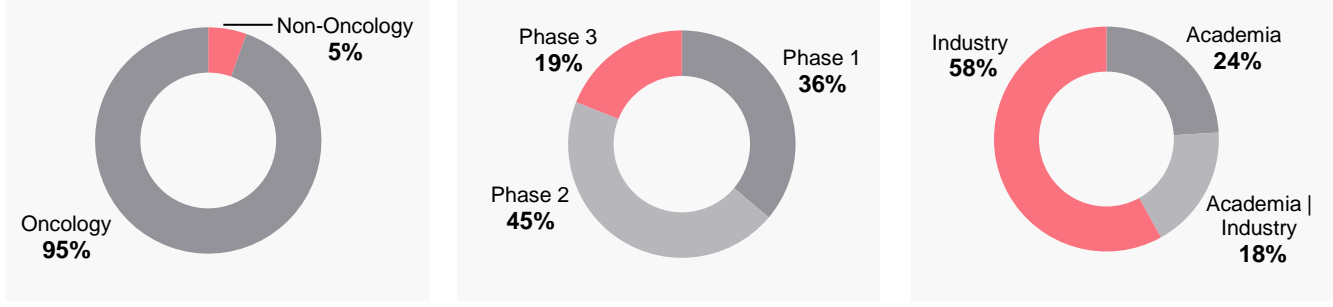
TPD Confidence Soars with Magical Growth

Strength of Proof of Concept - Activity	Compound Annual Growth Rate (CAGR)			
	2019-24 (E)	2014-24 (E)	2004-24 (E)	2004-14
Publications	14%	10%	8%	7%
Patents	18%	16%	12%	8%
Clinical Trials	41%	30%	24%	19%



Source: Lens.org, Clinicaltrial.gov, US FDA, FutureBridge Analysis, E: Estimated

80% in Early Stages, TPDs Promise to Transform Oncology



Key Clinical TPD Targets & their Developers



Conclusion

- TPDs approval in the next decade are expected to increase their market share to approximately USD 300 million by 2030, growing at a CAGR of 10.2%
- Promising efficacy data from PROTACs has boosted confidence in this novel revolutionary modality to treat hard-to-treat diseases
- Drug developers are closely monitoring efficacy, pharmacodynamic and pharmacokinetic data, and the ability of TPDs to deliver on their promise of durable target coverage with low doses

About FutureBridge

FutureBridge is a techno-commercial consulting and advisory company. We track and advise on the future of industries from a 1-to-25-year perspective to keep you ahead of the technology curve, propel your growth, identify new opportunities, markets and business models, answer your unknowns, and facilitate best-fit solutions and partnerships using our platforms, programs, and access to global ecosystems and players.