Investor meeting at ASTRO

September 16, 2019
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Important information

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

This presentation is intended for investors and analysts only. Some products are still in research and/or not cleared/approved in all markets. Cancer statistics are given to show the potential market in the respective area and does not mean that Elekta currently has products to treat these indications.
Setting the new standard in value-based healthcare

Dr Richard Hausmann, President and CEO
We are Precision. Radiation. Medicine.

Everyone with cancer should have access to and benefit from precise, personalized radiotherapy.
The need for Precision Radiation Medicine

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

1970-77 to 2007-2013

All cancers

Improve outcomes by safe dose escalation

Improve operational efficiency and patient experience by hypofractionation

Based on data by the journal of the National Cancer Institute; Surveillance, Epidemiology and End Results Program. Data visualization is available at OurWorldinData.org, where you'll find research and visualizations on this topic. Licensed under CC-BY-SA by the authors Hannah Ritchie and Max Roser.
Patient outcomes and access shaping industry trends

Alternative Payment Model

New EU cancer agenda

Growing economies

Chinese cancer program

Trends aligns well with our strategy of Precision Radiation Medicine
Elekta Unity

Unlocking hypofractionation possibilities and clinical discoveries for new anatomies
Clinical utilization from Aug 2018 until Sep 2019
Rectal tumor disappearing in 50 days

Baseline
Endoscopy

Reference
3D T2 MR 6 min

Mid-treatment
3D T2 MR 2 min

Day 38
3D T2 MR 2 min

Day 50
Endoscopy
Liver metastasis with Elekta Unity

Planning CT  Navigated T2  DWI

IV CT  Navigated T2 Cor reformat  DWI Sag reformat

Beam-on monitoring (Sagittal plane)

Courtesy of Froedtert Hospital / Medical College of Wisconsin
DWI is intended for imaging purposes only and is only CE marked for brain applications.
Clinical precision

Ref plan

Fx 1

Pre-treatment

7 days after Fx 1

34% reduction in tumor size diameter

Courtesy of Univ. Tubingen
Leksell Gamma Knife®

ZERO Margin
ZERO Delay
ZERO Harm
Treatment of multiple brain metastases

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

Going where the tumor is – that’s precision
AI-driven service

75% of our predictive cases were raised by IntelliMax® AI algorithms

>3,000 IntelliMax-generated cases have been raised to avoid clinical interruptions/downtime
Introducing ProKnow
Standardize quality of treatment

Centralize, archive, view and analyze treatment planning data

Automated Metrics and Performance Scorecards

Cloud base scalable framework
New standards in value-based healthcare

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

Elekta is well positioned for future growth
Precision radiation accessible for all
Maurits Wolleswinkel, President Linac Solutions
Precision radiation accessible for all

- Market position
- Innovation agenda
- New at ASTRO
Elekta’s installed base growing faster than global market

- Solid order and revenue growth
- Gain market share in growth markets
- Stable development in mature markets
- Growing treatment planning system (Monaco®) adoption in installed base
We see the customer needs clustered in 3 distinct segments

**Synergy® HD**
- Growth market indications
- Basic workflows, throughput focus
- Low cost of ownership

**Infinity™ HD**
- All indications incl. SRS/SBRT
- Multifunctional in capabilities, streamlined workflows
- Competitive cost of ownership

**Versa™ HD**
- Expand hypofractionated & stereotactic capabilities
- Workflow integration and online adaptive capabilities
- Competitive cost of ownership

**ACCESS**
Affordable productivity

**PERFORMANCE**
Versatile performance

**EXCELLENCE**
Focused precision
Next innovations focusing on nine areas around the patient, workflow and costs

**Patient in focus**
- Fast, accurate patient setup
- Less time on treatment table
- Better experience

**Workflow Integration**
- Fast adaptation
- End-to-end QA
- Streamlined image management

**Operating Cost**
- Fast installation, low cost of ownership
- High patient throughput
- High reliability
- Solar power

**Patient in focus**
- Better experience

**Workflow Integration**
- Streamlined image management

**Operating Cost**
- Solar power
Key enabler; AI-driven solutions

AI auto-segmentation models

AI synthetic CT creation from CBCT and MRI

Original CBCT
Registered CT
Synthetic CT

Works-in-progress
Expanding our linac portfolio

Precision Radiation accessible for all

- Versatility
- Footprint & installation
- Workflow integration
- Usability
Elekta approach to adaptive RT

Release new real-time adaptive platform

Leverage real-time adaptive platform in mainstream systems
Introducing response driven personalized care with RGRT
Response Guided Radiation Therapy

01
Innovation from ground-breaking Elekta Unity

02
Respond to changes and personalize treatment

03
Fast and easy workflow

LAUNCHING AT ASTRO
Acquisitions and collaborations to drive more precision and workflow integration

ProKnow acquisition

Surface Guidance with C-RAD

Complete QA portfolio

LAUNCHING AT ASTRO
Stereotaxy made easy

Versa HD

C-RAD SIGRT package*

RTsafe

*Available in Japan + North / Central America
HDRS; 1mm resolution enables leading stereotactic performance

Dynamic jaws move from segment to segment

Hi-resolution 1mm increments

Mimics effects of dynamic 1mm leaves for small fields
The strategic elements for QA are now in place.
Precision radiation accessible for all

- Strong portfolio
- Continued substantial growth of installed base
- Acceleration of innovation
- Addressing future needs around data, automation, integration and cost of ownership
Elekta Digital Solutions elevating outcomes

Sukhveer Singh, President Oncology Informatics Solutions
The framework of software driving value-based care

- Evidence-driven decision-making
- Workflow efficiency and standardization
- Continuous learning
MOSAIQ® Plaza
Intelligence for value-based healthcare

Introducing
MOSAIQ® Plaza

- SmartClinic
- IBM Watson
- ProKnow
- Medical Oncology
- Monaco HD
- Oncology Analytics
- Care Collaboration
- Patient Portal
- HIS Integration
Evidence-based decision support

**IBM Watson for Oncology**

- Humans + AI = Augmented Intelligence
- Humans excel at:
  - Clinical
  - Communication
  - Patient
  - Teamwork
  - Education
- AI excels at:
  - Natural language
  - Image identification
  - Machine learning
  - Decision support
  - Repetition and consistency

**MOSAIQ care collaboration**

- Multidisciplinary Tumor Board support & Chart round decision review

**MOSAIQ’s single source of truth**

- Multidisciplinary single database for all oncology that captures all decision points for every episode
Increased precision with real world data analytics

Analyze single patient
- RT-PACS universal and cloud-based
- Distributed contouring
- Remote peer review
- Automated performance scorecards
- Custom metrics (clinical outcome)
- Evaluate individual vs. ‘big data’ cohorts

Analyze patient populations
- Integrated and intuitive
- Cohort management
- Statistical process control
- Comparative effectiveness
- Case study libraries
- Clinical trials & outcomes analysis

ProKnow® = System of Profound Knowledge
Standardized pathways increase efficiency

MOSAIQ SmartClinic

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

MOSAIQ Voice Automation

- Save 125 hours every year
- Voice-created structured data
- Eliminate transcription costs
- 5-minute document availability
Our customers state the importance of clinical workflow

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

Christopher D Jahraus MD FACRO
ABR Certified Radiation Oncologist
Generations Radiotherapy & Oncology, PC
Real-world data driving continuous learning

**MOSAIQ® Oncology Analytics**
- Measure and benchmark outcomes
- Optimize resource utilization
- Activity-based costing
- Ensure compliance to evolving payment models

**METRIQ® Cancer Registry**
- Over 3 million outcome records in US
- Align operational decisions with clinical outcomes
Elekta cloud – further improvements to workflow

- Scale optimally & simplify access
- Standardize multi-site workflows
- Automate administration
Enabling the future

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

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

Patient engagement
Extend workflow solutions to integrate the entire patient care continuum across all care settings
Q&A
Thank you!