Enabling scientific advances to positively impact human health
Your genes. Your health.

Results for the year ended
31 March 2019

10 July 2019
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Presenters

Lyn Rees
Chief Executive Officer

- Joined July 2018
- 18 years with BBI Group, most recently as CEO for nine years
- Expertise in executing organic and acquisitive growth initiatives including product diversification and commercial globalisation

Barry Hextall
Chief Financial Officer

- Significant experience in medical device and diagnostic sectors including with IDS plc and JRI Orthopaedics and Zeneca (formerly ICI)
- Chartered Management Accountant
Table of Contents

• Overview of enlarged Yourgene Health plc
• Financial information
• Business update

Appendix
• Additional information
Overview of Yourgene Health plc
Yourgene Health

Key commentary

• International molecular diagnostics group which develops and commercialises genetic screening products and services in over 60 territories

• Proprietary DNA analysis technology used to develop safer and improved non-invasive screening tests

• Acquired Elucigene Diagnostics in April 2019 for a enterprise value of £8.8m

• Group now has a suite of leading CE-IVD NGS & PCR products focused on reproductive health including non-invasive prenatal screening (NIPT), Cystic Fibrosis and invasive prenatal aneuploidy screening

• Technology agreements with Thermo Fisher and Illumina, market leaders in NGS and PCR instrumentation

• Pipeline of new innovative diagnostic solutions in development for reproductive health and oncology clinical segments
Yourgene Health
By numbers

A leading NIPT test over 99% accurate\(^{(1)}\)

67% volume growth year on year

£8.9 million for year ending 2018/19 revenue (45% growth)

£12.5 million pro-forma revenue \(^{(2)}\)

Sales in over 60 countries

Global partners

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\(^{(1)}\) Relating to Down's syndrome, Edwards syndrome and Patau's syndrome
\(^{(2)}\) Pro-forma revenue calculated as £8.9m revenue calculated for 12 months to 31 March 2019 for Yourgene Health and £3.6m to 31 December 2018 for Elucigene Diagnostics
Key investment highlights

1. A leading next generation portfolio of NIPT and PCR solutions in large, fast growing markets with quantitative benefits versus standard of care.

2. Blue-chip industry partnerships including leading NGS players, Thermo Fisher and Illumina.

3. Real commercial momentum; 45% revenue growth and 67% test volume growth, with clean balance sheet following Thermo agreement.

4. In-house development expertise with pipeline of additional complementary products.

5. Elucigene is Yourgene’s latest acquisition in a fragmented market that presents opportunity for further consolidation.

6. Experienced management team with combined c.20% shareholding and track-record of executing a commercialisation strategy.
Transformational 24 months
Foundation for future growth

Elucigene Diagnostics acquisition offers an opportunity to accelerate Yourgene’s future growth strategy

<table>
<thead>
<tr>
<th>2017</th>
<th>2018</th>
<th>2019+</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Building a Global Platform</strong></td>
<td><strong>Positioning for Accelerated Growth</strong></td>
<td><strong>Accelerating Ahead</strong></td>
</tr>
<tr>
<td>✓ Completion of Yourgene Biosciences acquisition</td>
<td>✓ NGS collaborations agreed with Abnova and Coastal Genomics</td>
<td>✓ Major capital and commercial agreement with Thermo Fisher, writing off £12.7m of loans for 9% shareholding in Company</td>
</tr>
<tr>
<td>✓ Increased access to Asia, the world’s fastest growing NIPT market</td>
<td>✓ Lyn Rees appointed CEO</td>
<td>✓ High throughput product launched (Sage 32 plex)</td>
</tr>
<tr>
<td>✓ IONA® test validated for Thermo Fisher’s Ion S5 instrument range</td>
<td>✓ Final litigation settlement with Illumina ended three and a half year IP dispute</td>
<td>✓ 82,000 NIPT tests completed in year ended 31 March 2019</td>
</tr>
<tr>
<td>✓ New laboratory partnerships established in Europe, Middle East and Asia</td>
<td>✓ Entered into licence and supply partnership agreement with Illumina</td>
<td>✓ Transformational acquisition</td>
</tr>
<tr>
<td>✓ 24,000 NIPT tests completed in the year ended 31 March 2017</td>
<td>✓ 50,000 NIPT tests completed in the year ended 31 March 2018</td>
<td>• Product line expansion</td>
</tr>
<tr>
<td></td>
<td>✓ Changed name to Yourgene Health</td>
<td>• Regulatory submission for NIPT on Illumina platform</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Deliver US and China market entry strategies</td>
</tr>
</tbody>
</table>
Current and potential future products

Current Product Portfolio

Solutions across the Reproductive Health pathway

New Product Roadmap

- Apply successful existing model to additional tests
- Partnering across the value chain
- Diversify into gene analysis
- Inorganic product acquisition

Potential Future Products

- CF US version
- 5FU chemotoxicity
- PCR development capability
- NGS variants of Elucigene products

Non-Invasive Prenatal Test

Pre-birth

1st Trimester

2nd Trimester

3rd Trimester

Post-birth

Male Factor Infertility

Miscarriage

QST*R Pregnancy Loss

Genetic Thrombosis Risk Test

Invasive Rapid Aneuploidy (QST*R)

Cystic Fibrosis

Extended Reproductive Menu

Additional Oncology Menu

NIPT on New Platforms

Geographic variants for CF markers

2018  2019  2020  2021  2022
Financial information:

*Full Year Results to 31 March 2019*
Revenue growth driven by global progress

**Revenue progression**

- Revenue has grown in each of the past seven half year periods
- Revenue has grown at 45% year-on-year
- Scale, mix and product innovations, alongside realised cost reductions driving improved gross profit margin

**Group segmental sales by geography**

- Strong revenue growth driven by expansion into new geographic territories
- Notable recent commercial progress in Middle East, India and South East Asia driving sales growth of 51% year-on-year
- Year-on-year growth in UK and Europe of 20% and 47% respectively
- Further opportunity for geographic expansion opened up by September 18 Illumina licence agreement
2019 financial highlights

**Commentary**

- Statutory profit of £3.4m (2018: £9.6m loss), driven by debt restructuring announced in February 2019
- Revenues +45% to £8.9m (2018: £6.1m)
- Gross profits +45% to £4.6m (2018: £3.2m)
- Reduced Administrative expenses offset by higher development spending
- Adjusted EBITDA* loss down 29% to £3.1m (2018: £4.4m)
- Operating loss reduced by 44% to £4.8m (2018: £8.6m)
- Thermo Fisher debt restructure, net of equity instrument value, led to significant positive net finance income

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**Income Statement & bridge**

<table>
<thead>
<tr>
<th>12 months ended 31 March 2019</th>
<th>2017 £m</th>
<th>2018 £m</th>
<th>2019 £m</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Income</td>
<td>3.1</td>
<td>6.1</td>
<td>8.9</td>
</tr>
<tr>
<td>Less Cost of Sales</td>
<td>1.8</td>
<td>3.0</td>
<td>4.3</td>
</tr>
<tr>
<td>Gross Profit</td>
<td>1.3</td>
<td>3.2</td>
<td>4.6</td>
</tr>
<tr>
<td>Gross Margin</td>
<td>41.7%</td>
<td>51.6%</td>
<td>51.9%</td>
</tr>
<tr>
<td>Other operating income</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>General administrative expenses</td>
<td>6.2</td>
<td>7.7</td>
<td>7.5</td>
</tr>
<tr>
<td>R&amp;D expenditure net of credits</td>
<td>0.0</td>
<td>(0.1)</td>
<td>0.2</td>
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<tr>
<td>Adjusted EBITDA</td>
<td>(4.9)</td>
<td>(4.4)</td>
<td>(3.1)</td>
</tr>
<tr>
<td>Operating Profit / (Loss)</td>
<td>(7.6)</td>
<td>(8.6)</td>
<td>(4.8)</td>
</tr>
<tr>
<td>Total comprehensive profit / (loss)</td>
<td>(7.9)</td>
<td>(9.6)</td>
<td>3.4</td>
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</tbody>
</table>

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* Adjusted EBITDA is measured as the operating loss before depreciation, amortisation, separately disclosed items and IFRS16-affected operating lease commitments
2019 financial highlights

**Commentary**

- Non-current assets unchanged with capex and depreciation/amortisation offsetting
- Current assets increase due to higher cash balance
- Thermo Fisher warrant exercise and debt restructure transfers significant value from non-current liabilities to equity
- Post period end gross £11.8m equity fundraise and Elucigene acquisition adds significant additional balance sheet strength

- Operating cash consumption more than halved due to business growth
- £1.1m investment in equipment (2018: £0.2m), offset by £0.5m short-term asset inflow (2018: £0.5m outflow)
- £3.8m Thermo Fisher warrant exercise in Feb 2019 included in equity issues, and fully used for repayment of borrowings
- Net proceeds from post period end equity fundraise and Elucigene acquisition adds significant additional cash resilience

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**Statements of Financial Position & Cashflows**

*Statement of Financial Position*

<table>
<thead>
<tr>
<th>as at 31 March 2019</th>
<th>2017 £m</th>
<th>2018 £m</th>
<th>2019 £m</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goodwill</td>
<td>7.0</td>
<td>7.0</td>
<td>7.0</td>
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<tr>
<td>Intangible assets</td>
<td>1.5</td>
<td>1.4</td>
<td>1.2</td>
</tr>
<tr>
<td>Property, plant &amp; equipment</td>
<td>2.9</td>
<td>1.9</td>
<td>2.1</td>
</tr>
<tr>
<td>Total non-current assets</td>
<td>11.4</td>
<td>10.3</td>
<td>10.3</td>
</tr>
<tr>
<td>Current assets</td>
<td>6.1</td>
<td>4.3</td>
<td>5.3</td>
</tr>
<tr>
<td><strong>TOTAL ASSETS</strong></td>
<td><strong>17.6</strong></td>
<td><strong>14.6</strong></td>
<td><strong>15.6</strong></td>
</tr>
<tr>
<td>Current liabilities</td>
<td>6.9</td>
<td>4.6</td>
<td>4.2</td>
</tr>
<tr>
<td>Non-current liabilities</td>
<td>4.8</td>
<td>12.5</td>
<td>0.6</td>
</tr>
<tr>
<td>Equity</td>
<td>5.8</td>
<td>(2.6)</td>
<td>10.7</td>
</tr>
<tr>
<td><strong>TOTAL EQUITY AND LIABILITIES</strong></td>
<td><strong>17.6</strong></td>
<td><strong>14.6</strong></td>
<td><strong>15.6</strong></td>
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</tbody>
</table>

*Statement of Cashflows*

<table>
<thead>
<tr>
<th>for the 12 months ended 31 March 2019</th>
<th>2017 £m</th>
<th>2018 £m</th>
<th>2019 £m</th>
</tr>
</thead>
<tbody>
<tr>
<td>Net cash used in operating activities</td>
<td>(7.9)</td>
<td>(9.6)</td>
<td>(4.0)</td>
</tr>
<tr>
<td>Net cash (used) / generated from investing</td>
<td>0.0</td>
<td>(0.6)</td>
<td>(0.6)</td>
</tr>
<tr>
<td>Proceeds from equity issues</td>
<td>1.5</td>
<td>0.0</td>
<td>9.6</td>
</tr>
<tr>
<td>Proceeds from borrowings</td>
<td>2.4</td>
<td>9.2</td>
<td>0.1</td>
</tr>
<tr>
<td>Repayment of borrowings</td>
<td>0.0</td>
<td>0.0</td>
<td>(4.1)</td>
</tr>
<tr>
<td>Interest paid</td>
<td>(0.0)</td>
<td>(0.0)</td>
<td>(0.0)</td>
</tr>
<tr>
<td>Net cash from financing activities</td>
<td>3.8</td>
<td>9.2</td>
<td>5.6</td>
</tr>
<tr>
<td><strong>NET CASH MOVEMENT</strong></td>
<td><strong>(4.0)</strong></td>
<td><strong>(1.0)</strong></td>
<td><strong>1.0</strong></td>
</tr>
<tr>
<td>Opening cash</td>
<td>5.3</td>
<td>1.3</td>
<td>0.3</td>
</tr>
<tr>
<td><strong>CLOSING CASH BALANCE</strong></td>
<td><strong>1.3</strong></td>
<td><strong>0.3</strong></td>
<td><strong>1.3</strong></td>
</tr>
</tbody>
</table>
Post year end Elucigene acquisition
Integration proceeding at pace

Pro forma Income Statement for enlarged Group

<table>
<thead>
<tr>
<th>Unaudited pro forma 2019 enlarged Yourgene Group Income Statement</th>
<th>£m</th>
<th>Yourgene</th>
<th>Elucigene (1)</th>
<th>Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revenue</td>
<td>8.9</td>
<td>3.6</td>
<td>12.5</td>
<td></td>
</tr>
<tr>
<td>Gross Profit</td>
<td>4.6</td>
<td>3.1</td>
<td>7.7</td>
<td></td>
</tr>
<tr>
<td>Other operating income</td>
<td>0.0</td>
<td>0.2</td>
<td>0.2</td>
<td></td>
</tr>
<tr>
<td>Administrative expenses (2)</td>
<td>7.7</td>
<td>2.0</td>
<td>9.7</td>
<td></td>
</tr>
<tr>
<td><strong>Adjusted EBITDA (2)</strong></td>
<td><strong>(3.1)</strong></td>
<td><strong>1.2</strong></td>
<td><strong>(1.9)</strong></td>
<td></td>
</tr>
<tr>
<td>Depreciation, amortisation &amp; IFRS16-affected leases</td>
<td>1.3</td>
<td>0.6</td>
<td>1.9</td>
<td></td>
</tr>
<tr>
<td>Separately disclosed items</td>
<td>0.4</td>
<td>0.0</td>
<td>0.4</td>
<td></td>
</tr>
<tr>
<td><strong>Operating profit / (loss)</strong></td>
<td><strong>(4.8)</strong></td>
<td><strong>0.6</strong></td>
<td><strong>(4.2)</strong></td>
<td></td>
</tr>
</tbody>
</table>

(1) based on audited FRS102 accounts for the financial year ended 31 December 2018
(2) before separately disclosed items: share-based payments and warrant expenses, litigation provision release and impairment losses on financial assets (IFRS9)

Integration highlights

- Cross-functional integration team established
- Co-marketing and cross-selling now effective
  - Range-selling training completed
  - Integrated exhibition stands at key events ESHG and FMF to showcase the full product portfolio
  - Global sales team conference being held in July
- £0.5m annualized integration cost synergies identified and implementation underway
- Head office property consolidation well advanced
- People integration progressed significantly
  - Performance management systems aligned
  - Cultural and social integration activities held
  - All departments combined into single management structure
- Process, systems and regulatory harmonization plan developed for implementation by mid 2020
Business update
Transformational Areas of Focus

- NIPT land grab
- Full integration of Elucigene
- US, Japan, China market entry strategy
- Value model → high margin
- Leverage Thermo Fisher and Illumina relationships
- Expand product portfolio – reproductive health, oncology and direct to consumer segments
- Scalable business processes and systems
- Careful selection of other M&A targets
Expanded Global Coverage

Expanding reach
- Yourgene coverage
- Extra Elucigene coverage
- Development markets
Partnerships and Future Opportunities

Future Direction

- Oncology screening: colon, breast, lung, pancreatic cancer
- Non-invasive paternity testing
- Male fertility testing
- Pre-implantation genetic screening
- BRCA 1/BRCA 2
- Non-invasive prenatal screening
- Rhesus D
- Pre-eclampsia screening

Working in Partnerships

- Contract development
- Product in-licencing
- Strategic key supplier partnerships
- Co-marketing relationships
- KOL and third party collaborations
- Grow distribution and customer footprints
## Strategic priorities for growth

<table>
<thead>
<tr>
<th>Organic</th>
<th>Inorganic</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Product penetration</strong>&lt;br&gt; <em>Sell More in Existing Channels</em></td>
<td><strong>M&amp;A</strong>&lt;br&gt; <em>Consolidator in the Market</em></td>
</tr>
<tr>
<td>Drive worldwide sales of NIPT, Cystic Fibrosis and other Reproductive Health products and services by targeting further expansion through direct and key distribution channels</td>
<td>Considering additional selective synergistic M&amp;A opportunities</td>
</tr>
<tr>
<td><strong>Geographic expansion</strong>&lt;br&gt; <em>Sell into New Territories</em></td>
<td>Fragmented market with minimal medium-sized entities, presents opportunity for consolidation</td>
</tr>
<tr>
<td>Expand directly and through distributors into new geographies, including those opened up by Illumina licence agreement</td>
<td>Elucigene Diagnostics acquired April 2019</td>
</tr>
<tr>
<td><strong>Product expansion</strong>&lt;br&gt; <em>New Product Lines and Content</em></td>
<td></td>
</tr>
</tbody>
</table>
Appendix: Additional information on Elucigene Diagnostics acquisition
Elucigene Diagnostics – Company Snapshot

**Key Commentary**

- Founded in 2013, headquartered in Manchester
- Acquired by Yourgene Health plc in April 2019
- A leading molecular diagnostics manufacturer and developer
- Suite of IVD CE marked products focused on reproductive health and oncology
- Current leading products for:
  - Cystic fibrosis testing
  - Invasive prenatal aneuploidy screening
- Elucigene’s simple to use products make genetic testing quicker and easier, delivering high information content
- Pipeline of new innovative diagnostic solutions in development

**Elucigene by Numbers**

- £3.6 million revenue FY18\(^{(1)}\)
- £1.0 million adjusted EBITDA FY18\(^{(1)}\)
- 36 FTEs – 43% commercial, 57% technical
- 36 commercial products
- 26 distributors across 57 countries
- 10,000 sq. ft. facility located within 1km of Yourgene’s HQ

\(^{(1)}\) Financial statements for the year ended 31 December 2018; adjusted EBITDA excludes exceptionals and non-transferring costs
Post year end Elucigene Acquisition

Compelling rationale revisited

- Group Financial Transformation
- Increase Global Footprint
- Increase Customer Base
- Consolidation of Facilities
- Commercial Scale
- Committed Leadership Following Equity
- Broaden Technology Scope
- Deeper Commercial Products Offering and Future Pipeline
- Acquisition of High Quality Sales, Commercial and Regulatory Personnel