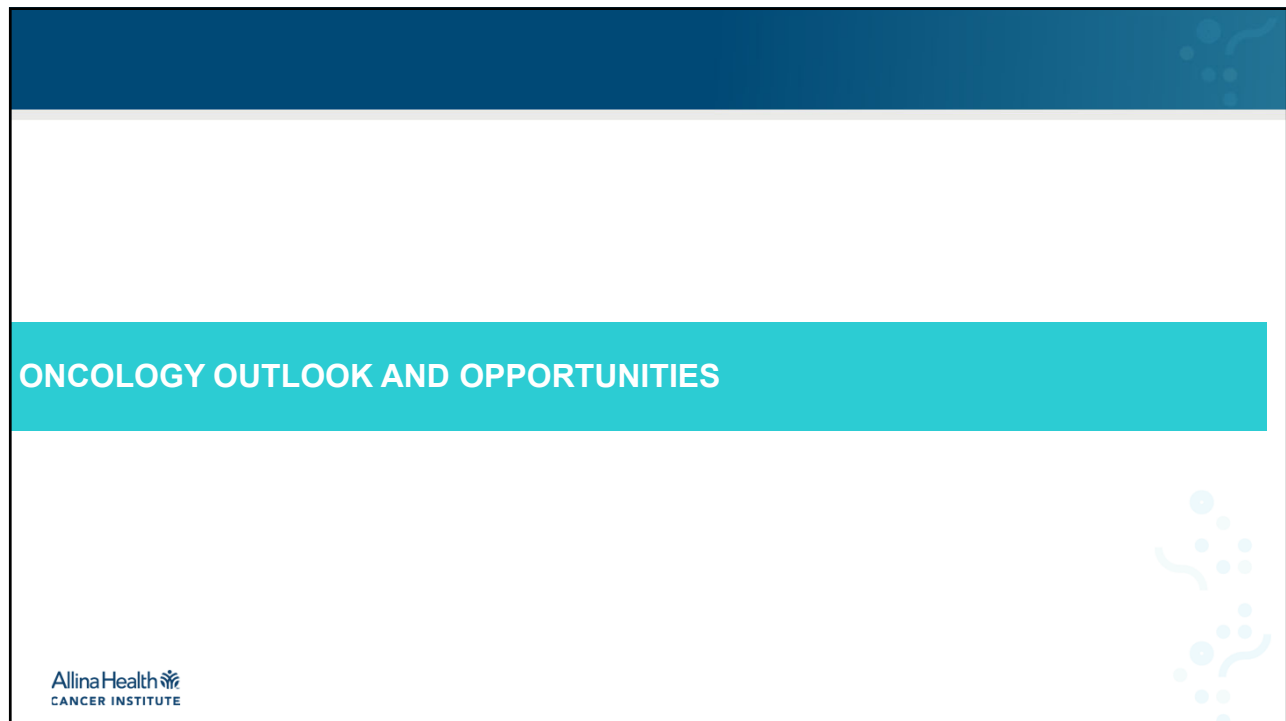





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CHALLENGES TO ADDRESS

- **Cancer care silos and fragmentation** – lack of integration, coordination and teamwork can deny patient access to the best possible care
- **Limited team diversity, limited health equity** – a person's race, gender socioeconomic status or geography should never determine their chances of surviving cancer, but too often they do.
- **The daunting challenge and limitless potential of technology** – the sheer amount of information and technology now available to cancer care providers is in some ways undermining the effectiveness of that data.

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CHANGE IS OUR CONSTANT



Cancer Landscape

Margin Pressures

Workforce

Growth

Site of Care

Evolving Consumer Expectations

Value Based Care

Clinical Advances and Innovation

Social Determinants of Health

Payment and Policy

Multi-Disciplinary Care Delivery

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WHAT WILL DRIVE VALUE BASED CANCER CARE DELIVERY



5

RAPID EVOLUTION OF PRECISION MEDICINE AND CARE REDESIGN



6

POLICY REFORM, SUPPLY CHAIN PRESSURES AND MORE



SHIFTING
POLICY

OCM pilot **—\$377M**;
2023 RO bundle pilot

- Integrate clinical pathways.
- Understand VBP offering.
- Enhancing Oncology Model
JUST ANNOUNCED



RISING DRUG
COSTS

Oncology **22.9%**
portion of drug spend,
3.14% inflation rate

- Pursue payer integration.
- Streamline drug management (eg, inventory, prior authorization).



EMERGING
MARKET
ENTRANTS

21%

Increase in corporate acquisition
and community practice mergers

- Rethink MDC alignment options.
- Optimize integrative tools.

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ADDRESSING HEALTH EQUITY AND COMMUNITY NEEDS

DISPARITIES IN RESEARCH

Whites comprise an estimated **83%**
of overall clinical trial participants.

4%–6%
African American
CT enrollment

3%–6%
Hispanic CT
enrollment

Racial and ethnic minorities bear the
highest cancer burden in the US.

CREATE AWARENESS, BROADEN OUTREACH, MITIGATE BARRIERS

- Focus clinical trials on being patient-centric/friendly and trustworthy.
- Extend network to help reduce disparities across multiple communities.
- Match processes and compliance with complexity of trial—remote centralized monitoring and support.



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RAPID EVOLUTION OF CLINICAL INNOVATIONS



Molecular/Genomic

- Imaging technologies allow targeting tumors more precisely during treatment, sparing surrounding organs.
- Highly accurate radiation dose to tumors that move during respiration and patient movement



Diagnostic + Tx

- Treatment-planning software combining multimodality image fusion
- New imaging technologies enabling doctors to identify tumors at an earlier stage when they are smaller



AI

- AI-driven automatic motion synchronization and adaptation capabilities; FDA 510(k) clearance for world's first AI-powered autocontouring solution
- Efficient optimization of treatment plans—creation of multiple plans in the same day



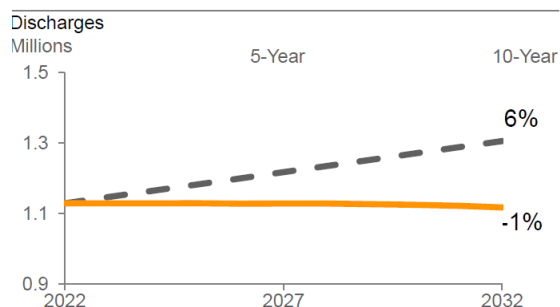
Adaptive Therapy

- Single-room systems for targeted (eg, IMPT) and expanded clinical applications will drive later growth.
- Pediatrics is prime opportunity.
- Strong 10-year growth (>200%) over low baseline volume

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HIGH ACUITY DRIVING INPATIENT VOLUME

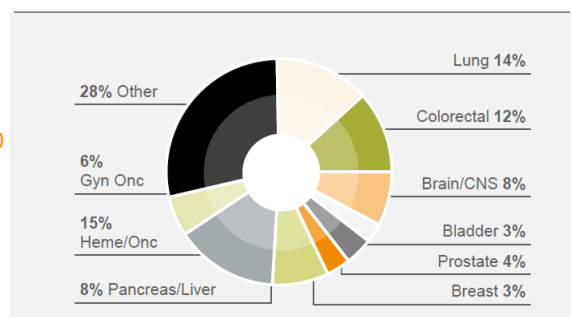
Inpatient Cancer Forecast US Market, 2022–2032



Surgeries Drive IP Cancer Growth



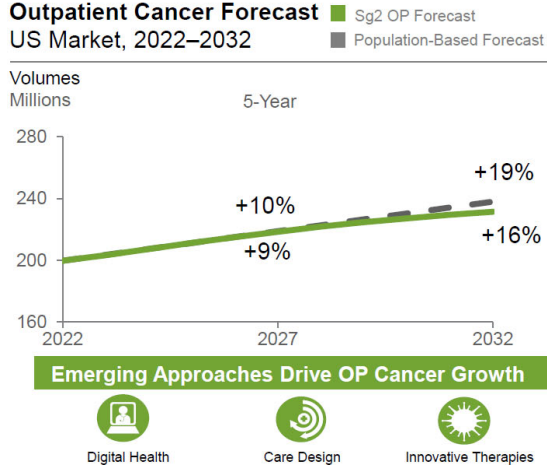
Inpatient Cancer Discharges US Market, 2022 Total Volume: 1.2M



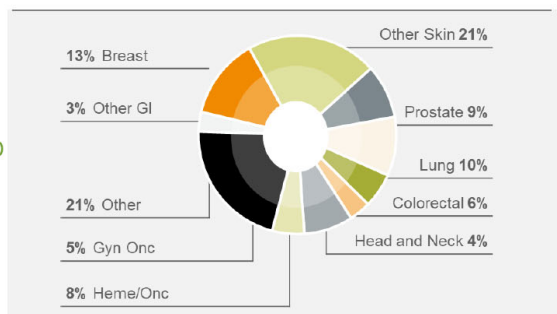
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OP GROWTH FOLLOWS

Outpatient Cancer Forecast US Market, 2022–2032



Outpatient Cancer Discharges US Market, 2022 Total Volume: 200M

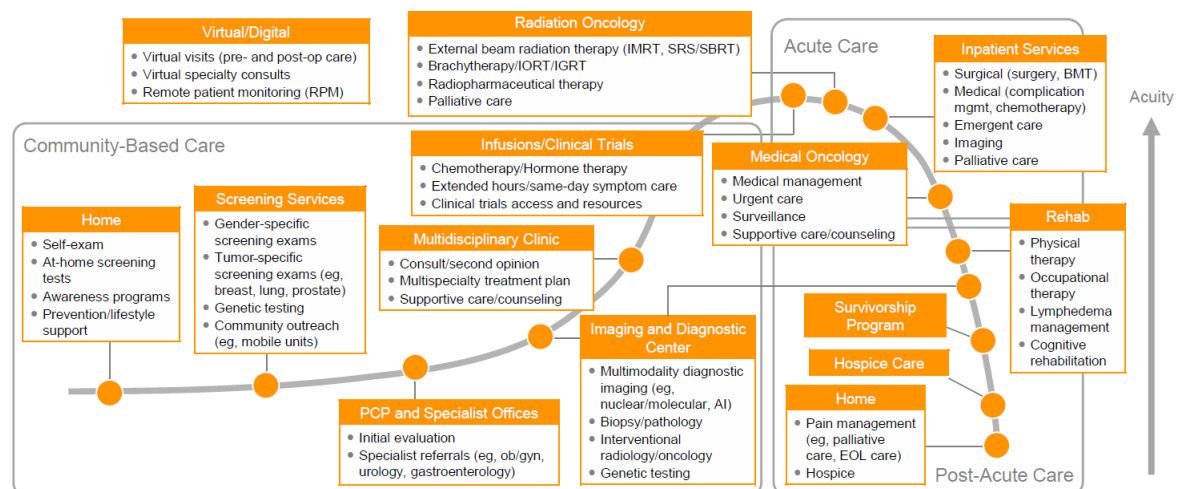


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PROGRAM DEVELOPMENT AND GROWTH

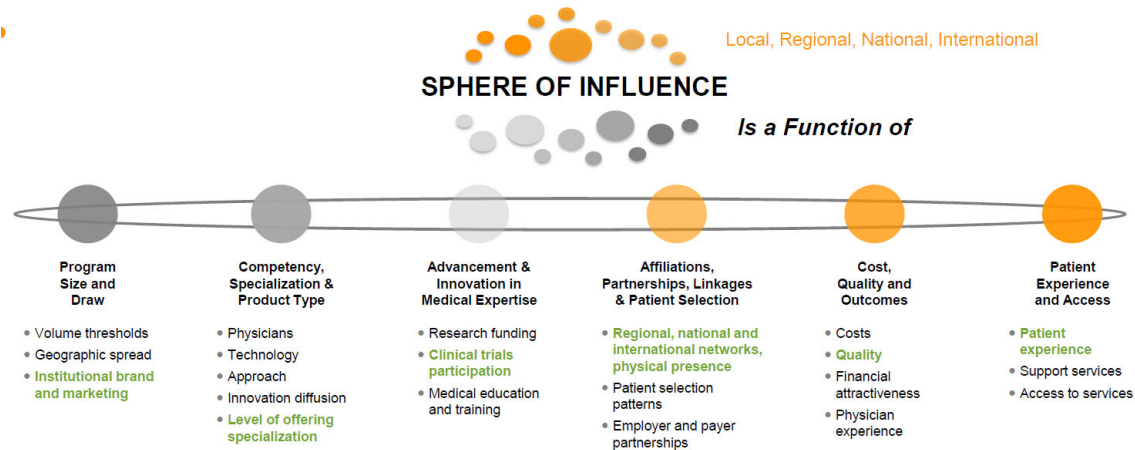


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DIFFERENTIATION IN A COMPETITIVE MARKET



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OPTIMIZING EVERY DECISION POINT

GROWTH AND DIFFERENTIATION OF CANCER SERVICES

HIGH-PERFORMING SERVICE	FOCUSED CHANNEL MANAGEMENT	HIGH-QUALITY CARE DELIVERY	MULTIDISCIPLINARY ALIGNMENT
Seamless Coordinated Care	Comprehensive and Timely Access	Evidence Based Care	Subspecialty Expertise
Innovative and Advanced Approaches	Outreach	Personalized Care	Collaborative Integrative Care
	Attention to Value and Total Cost	Robust Onco-analytics	Effective care teams

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