



Novartis Oncology: Continuing to Deliver Innovation to Help Cancer Patients

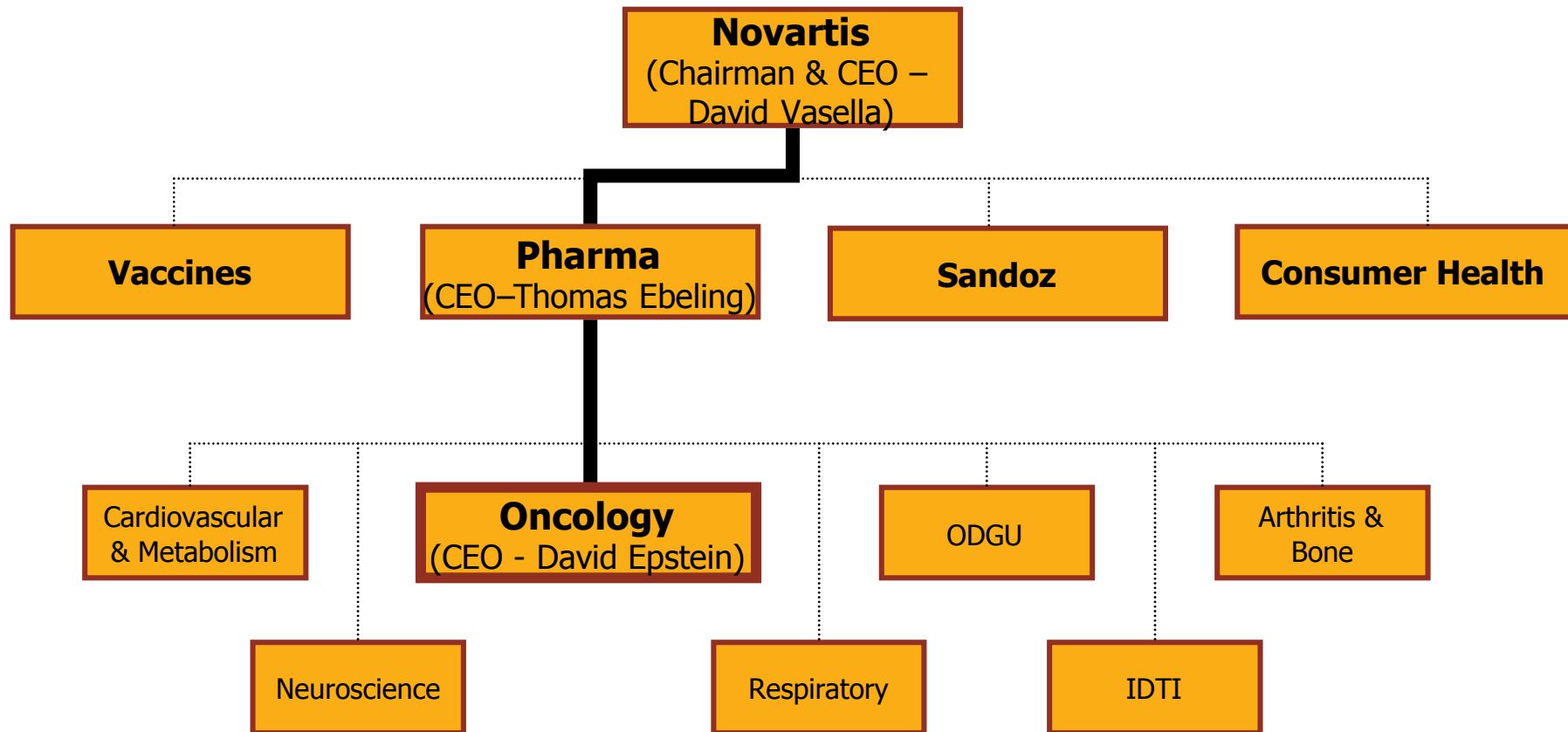
Dany Habr, MD

Global Medical Director

Novartis Oncology



Novartis Oncology: who are we?



A Business Unit within Novartis Pharmaceuticals

Quick Facts about Novartis Oncology in 2007

- Present in more than 50 countries
 - Around 4000 employees
-

- Organized in:

- 5 regions:**

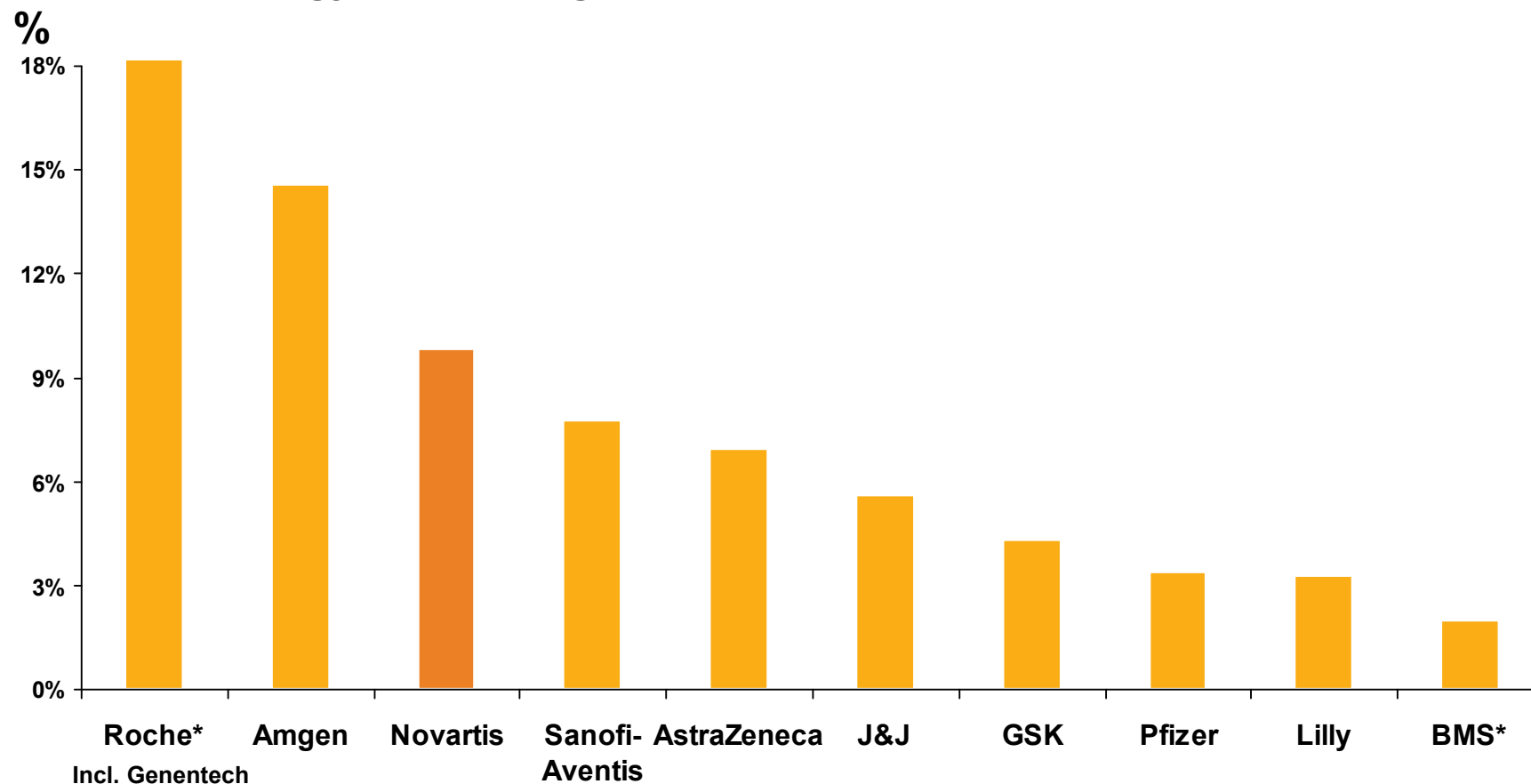
- North America
 - Region Europe
 - Japan
 - Latin America
 - Emerging Growth Markets (EGM)

- ...and 7 functions:**

- Oncology Global Development
 - Human Resources
 - Finance & IT
 - Legal
 - Global Communications & External Relations
 - Business Development & Licensing
 - Global Product Strategy & Scientific Development
-

Novartis Oncology is Now the World's Third-Largest Oncology Business

Global Oncology Market Segment Share



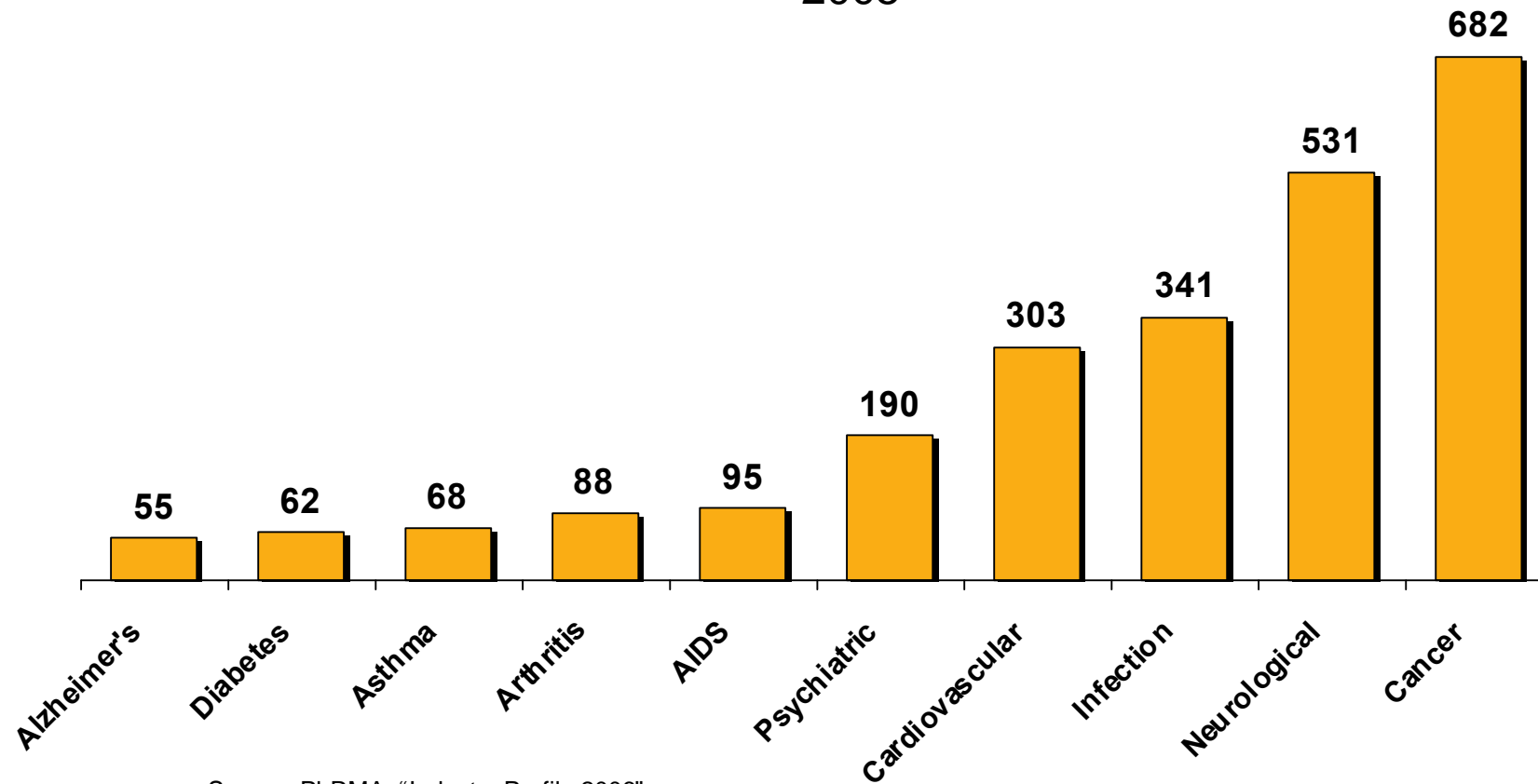
Worldwide Market Share based on IMS MIDAS Data



Pharma Companies have Full Oncology Pipelines: Steady supply of new products in development

Investigational Drugs in Clinical Development

2005



Source: PhRMA, "Industry Profile 2006"

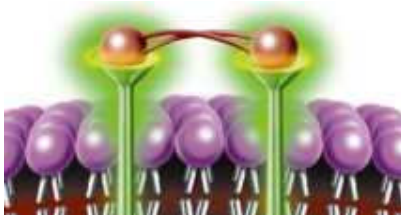
Novartis Oncology Global Mission

Through consistently delivering innovative therapies which significantly reduce the burden of cancer, we will improve and extend the lives of cancer patients



- Commitment to oncology

- Innovative research in partnership with research institutes around the world
- 4,000 employees in 50+ countries



- Focus on scientific innovation

- Broad pipeline ranging from small molecule signal transduction inhibitors to novel cytotoxics



- Focus on patient care

- By working together, we can quickly develop new agents to help patients with cancer

Key Brands Treat a Broad Range of Diseases in the Oncology and Hematology Fields



- Now approved in CML, metastatic GIST and 5 rare diseases. **Tasigna**[®] (nilotinib) file submitted for Glivec-resistant/intolerant CML



- Leading bisphosphonate therapy for patients with bone metastases



- Highly efficacious aromatase inhibitor for post-menopausal women with receptor positive breast cancer



- Leading therapy for gastroenteropancreatic/ neuroendocrine tumors and acromegaly

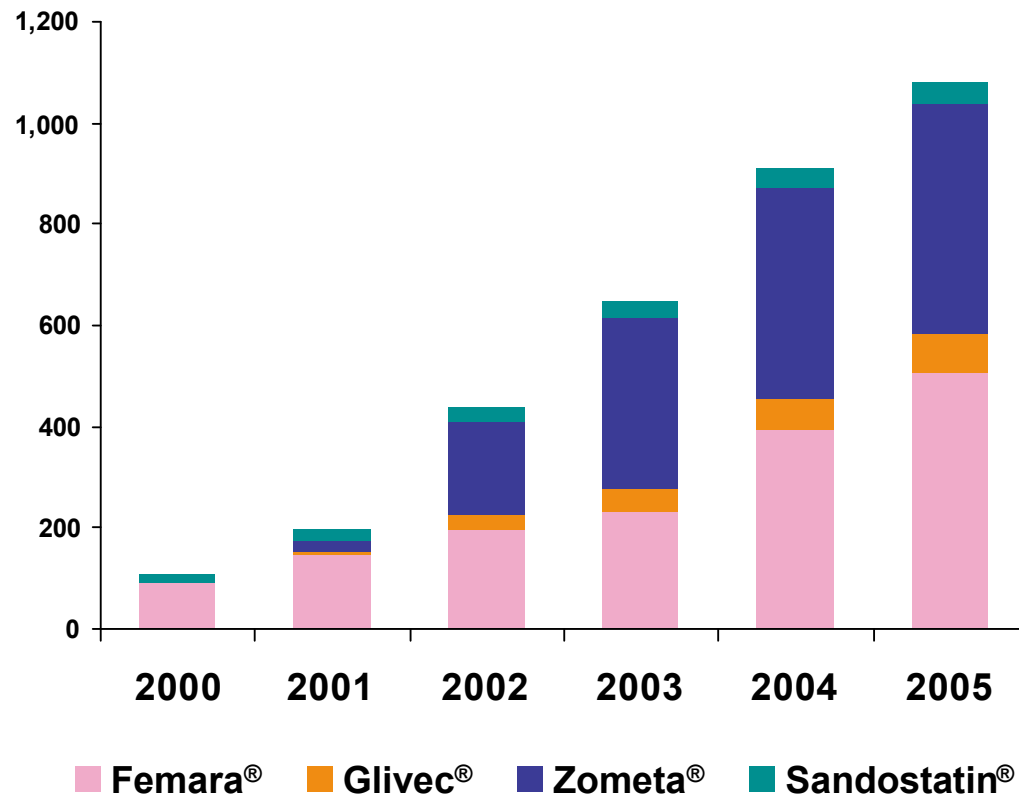


- Novel once-daily oral therapy for iron overload, offering major benefits in patient convenience



Our Medicines Are Helping Over One Million Patients Every Year

Patients helped by Novartis Oncology medicines (in thousands)



Our work is saving lives around the world



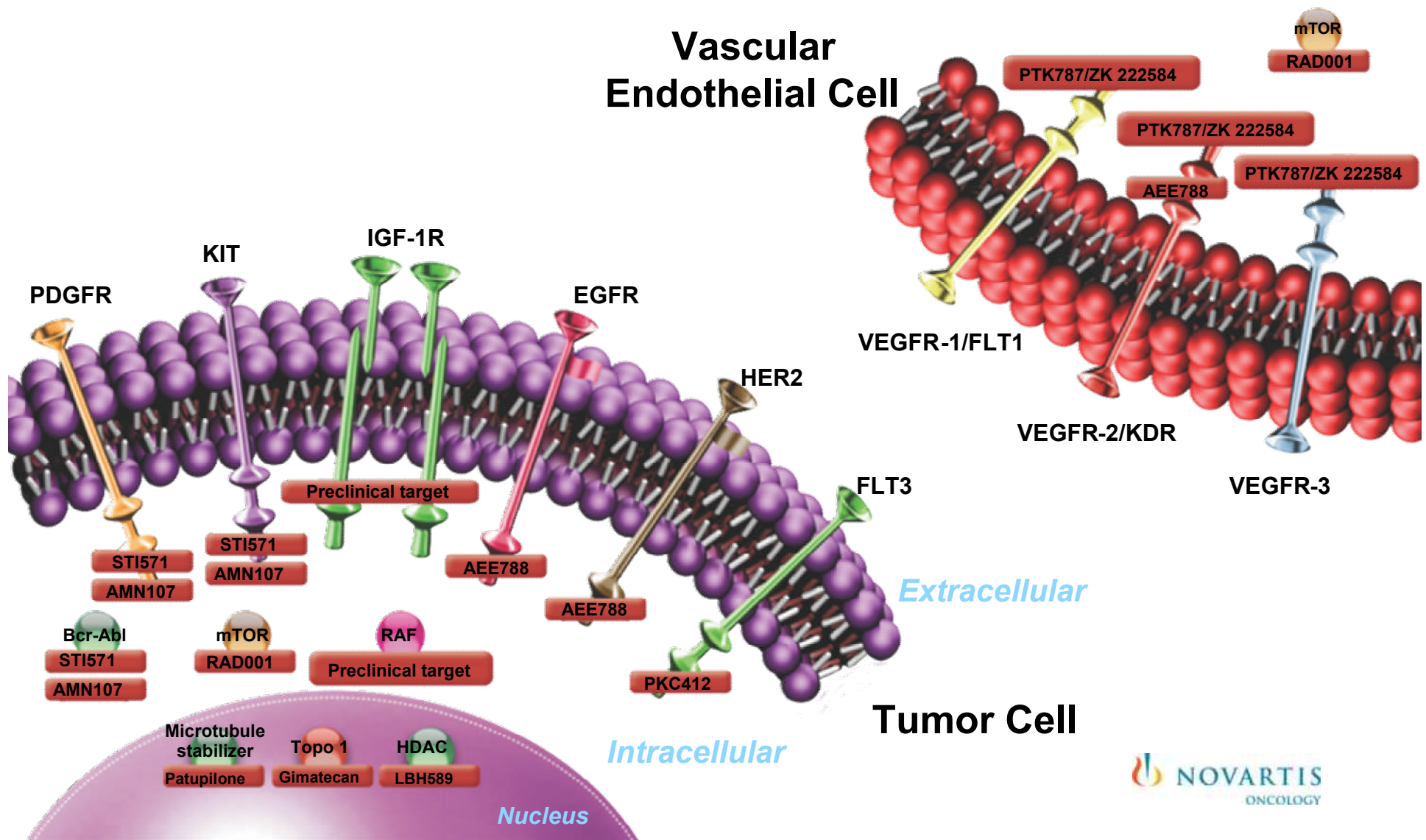
- **100 000 patients** receiving Glivec[®] worldwide
- **# of CML deaths reduced by almost 75%** in the US since Glivec[®] introduced in 2001¹
- **>19 000 patients** have received Glivec[®] at no cost through Novartis Assistance Program²



¹ American Cancer Society 2006 statistics

² Glivec[®] International Patient Assistance Program (GIPAP)

Targeting Key Cancer Pathways



Oncology Research

Novartis Institutes for Biomedical Research



Basel, Switzerland

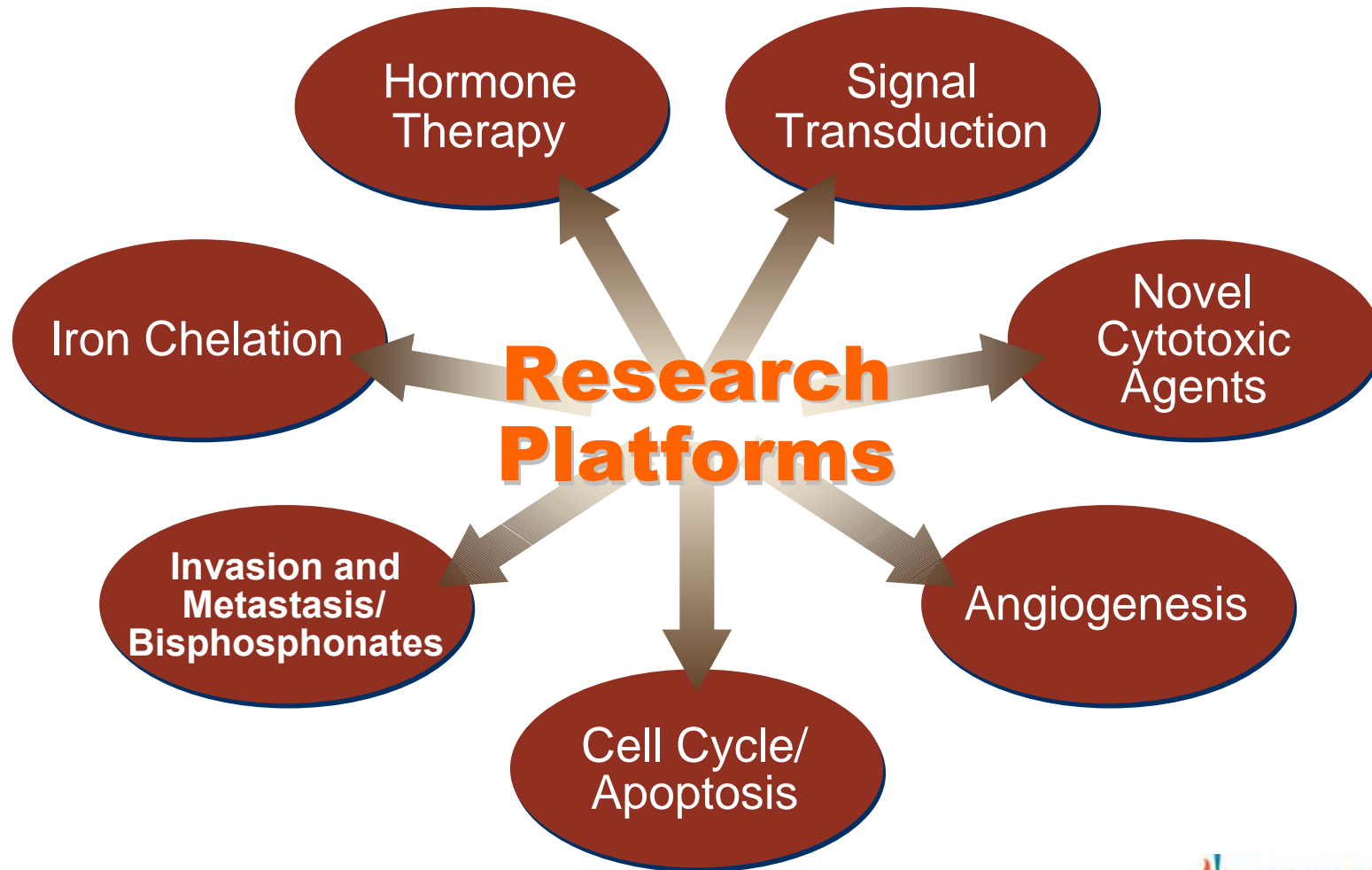


Cambridge, USA

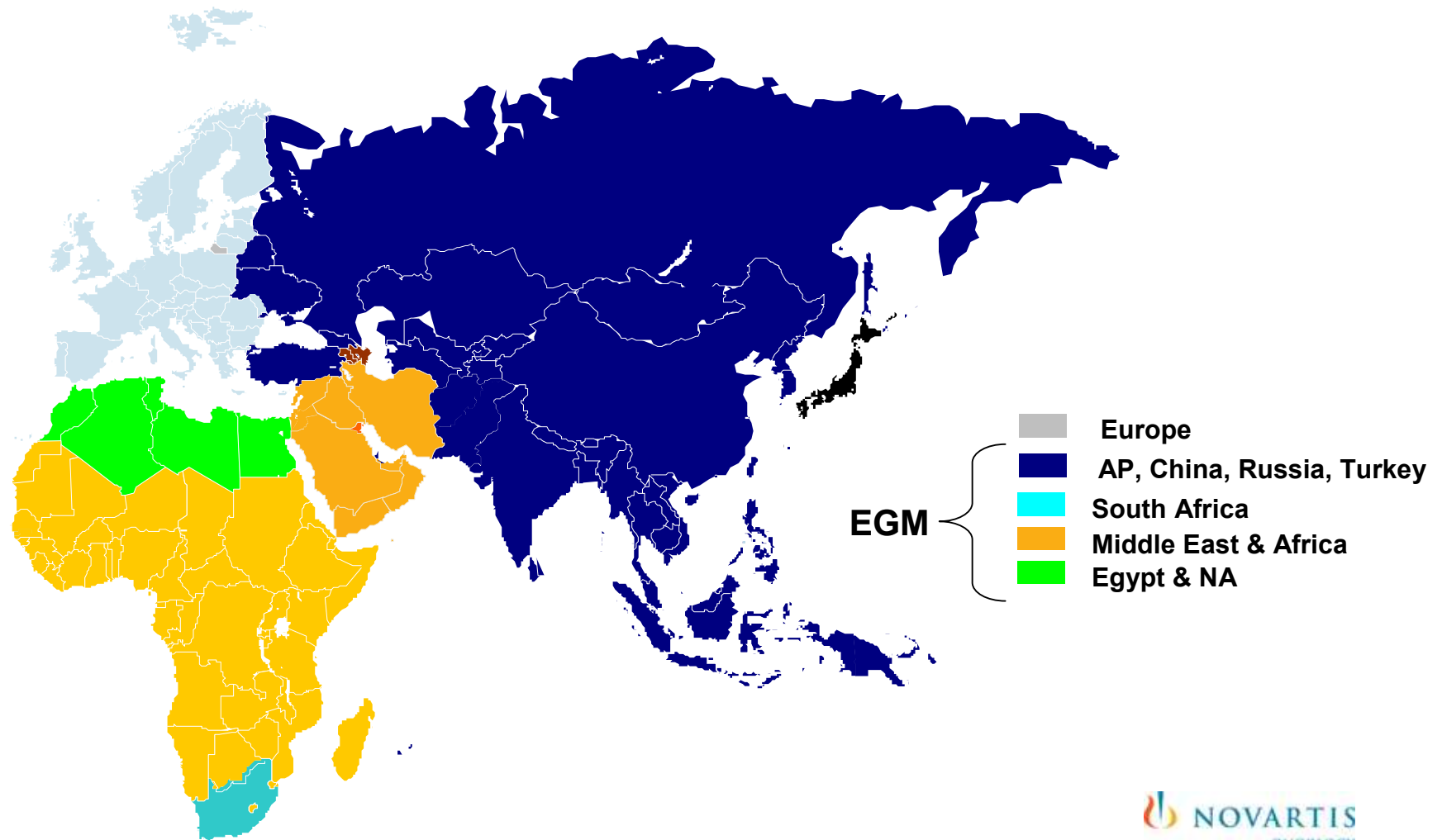
- Oncology research based in:
 - Basel, Switzerland
 - Cambridge, MA
 - La Jolla, CA
- New programs in:
 - Target discovery
 - Functional genomics
 - Biomarkers
 - Targeted imaging
 - Angiogenesis
 - Monoclonal antibodies
 - Epigenetics

Novartis Oncology Pipeline

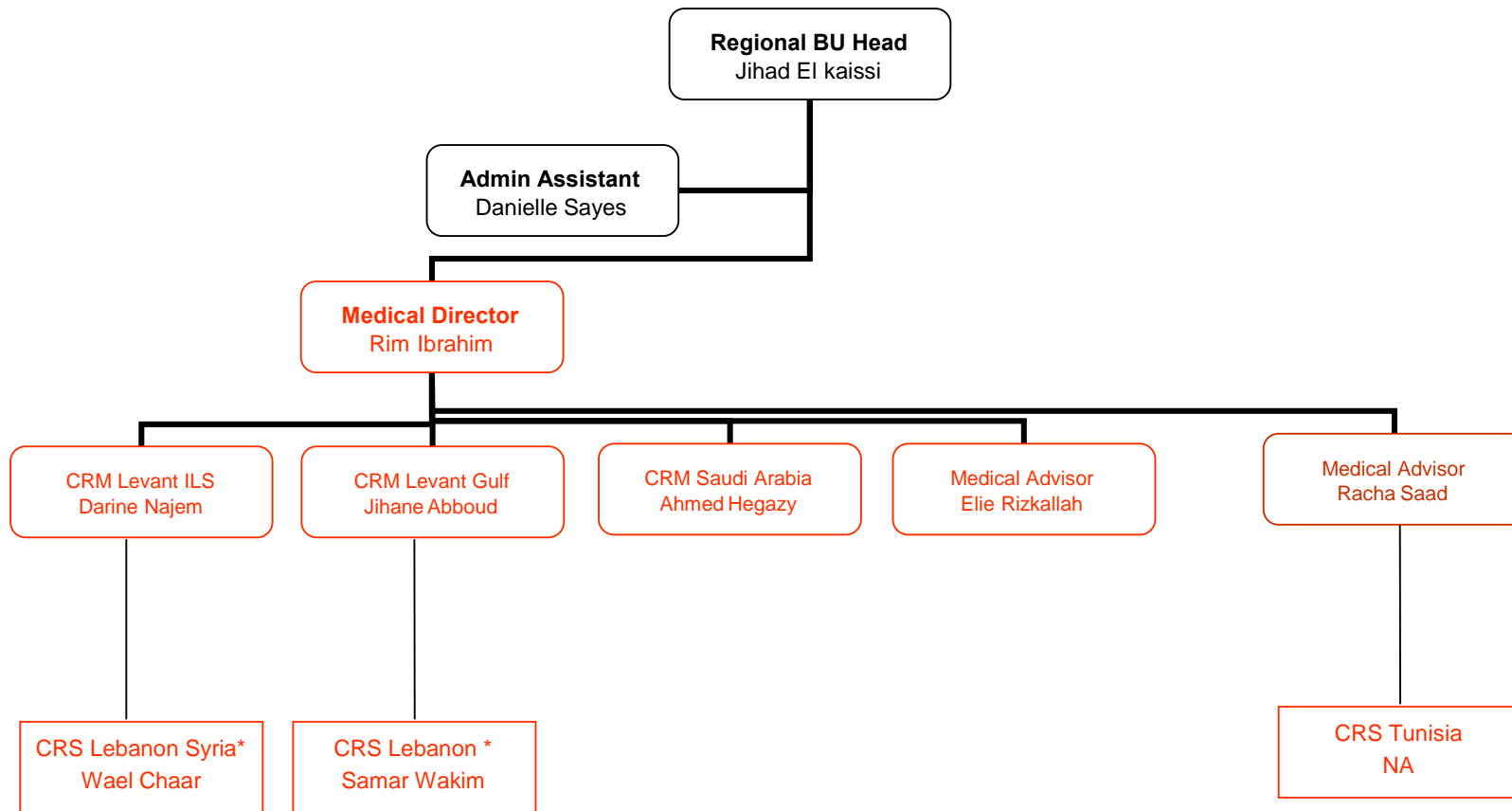
Diversified Research Platforms



Oncology BU EU and EGM Regions



Medical Affairs – Middle East and North Africa Regions



• **2 members in 2005, 9 members in 2007**

Over 1000 patients enrolled/planned in on-going Novartis and third party trials in the Middle East



3 studies ongoing, with **11 trial/sites** across 5 countries with over **500** patients enrolled.

6 Abstracts at TIF, EHA & ASH



2 trials ongoing with **10 sites** cross 3 countries with over **100** patients

Investigators Initiated trials

- 9 sites/4countries
- 6 Abstracts/One publication



ENACT 5 sites/5 countries/ **60** patients



CML Registries 3 countries/ **700** patients
GIST Pathology Reviews



1 study 3 sites/2 countries/ **20** patients

Significant Development Milestones Expected To Be Achieved in 2007

- Regulatory decisions on first Tasigna[®] submissions
- Initiation of new Tasigna[®] registration studies in suboptimal CML responders and newly-diagnosed CML
- Initiation of new registration studies
 - PKC412 in FLT-3 mutated acute myelogenous leukemia
 - Tasigna[®] in GIST
 - LBH589 in refractory CML and multiple myeloma
 - SOM230 in refractory carcinoid tumors and acromegaly
 - RAD001 in refractory carcinoid tumors and confirmatory Phase III in pICT¹
- New Glivec[®] life cycle data
- Regulatory decisions on Zometa[®] in aromatase inhibitor associated bone loss

¹ Pancreatic islet cell tumors

Conclusions

- Committed to oncology, endocrinology and hematology
- Broad and deep pipeline
 - Ranging from small molecule signal transduction inhibitors to novel cytotoxics
 - In all stages of development
 - From common to rare cancers
- Unique opportunity to combine agents across various mechanisms of action
- Potential to provide better treatments to cancer patients

Our Approach to Collaboration



At Novartis Oncology, we commit to:

- Build truly collaborative partnerships with you in research and development
- Be open with new data
- Seek continuous input from you to inform the development of new medicines that will transform patients' lives

