immunodiagnosticsystems

Innovation in Immunoassays

Final Results
&
Launch of Strategic Plan

24 June 2014

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Strategic Plan & Operational Highlights

Launch of Strategic Plan

- Leading solution provider to clinical laboratory diagnostic market
- Endocrinology excellence automated menu and broader complementary menu
- Geographic expansion focused initially on Brazil and China
- Continued investment for future growth
- 5 Year Targets: Doubling of revenue, 1000+ increase in installed base, 80+ increase in assay menu

Operational Highlights

- Development of next generation of IDS-iSYS instrument remains on track for H1 2015
- FDA clearance of 1,25 dihydroxy vitamin D and Direct Renin. Further assay launches planned in 2014/15
- Total instruments sold/placed 92 (2013: 138) with 35 net direct placements (2013: 88)

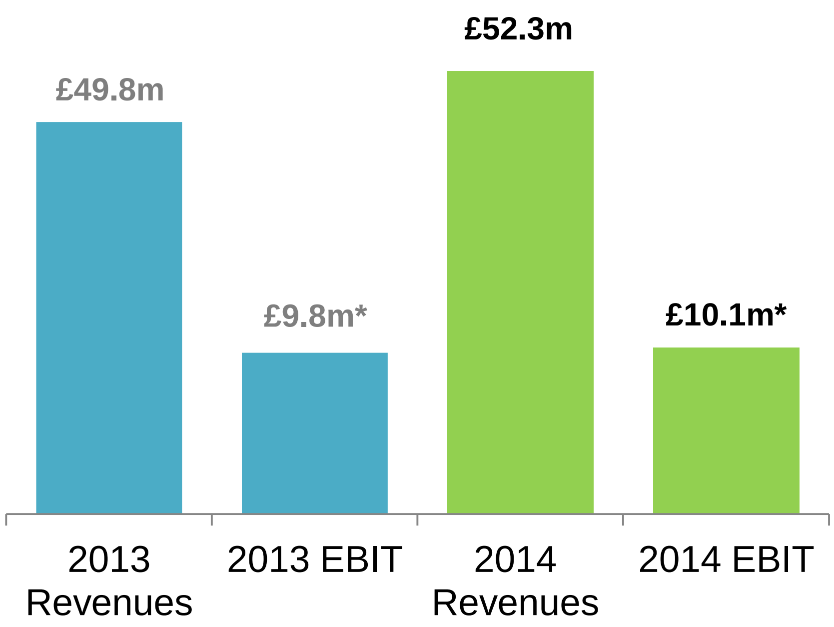
Solid Financial Performance

- Return to top line growth
- 5% increase in revenue to £52.3m (2013: £49.8m)
- Automated revenues (IDS-iSYS), 43% of overall revenues, up 21% to £22.4m (2013: £18.5m)
- Revenues from manual tests, 40% of overall revenues, decreased by 18% to £20.8m (2013: £25.3m)
- Adjusted* EBIT increased to £10.1m (2013: £9.8m)
- Cash inflow from operations: £13.8m. Net funds of £26.7m (2013: £19.6m)
- Final Dividend of 8.5p (2013: 3.0p), reflecting new dividend policy

* Before exceptional items

21%

Automated revenue growth

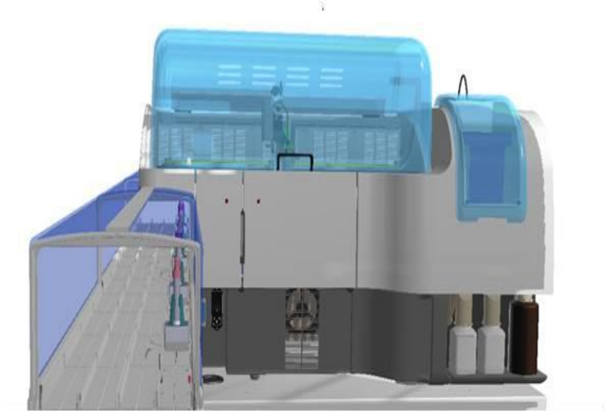


Operational Highlights

Innovation in Immunoassays

Mark II Development Remains on Target

- Expected launch of Mark II in H1 2015
- IDS and Stago collaboration on Mark II progressing well
- Mark II benefits:
  - **Cost** –30% cheaper to manufacture than Mark I
  - **Trackable** – will be able to connect the Mark II to major laboratory track systems
  - **Improved functionality - ** new customer features e.g. new Graphical User Interface
- Work ongoing to connect Mark II with 2 major track systems



Large centralised labs	✓✓
Hospital labs	✓
Smaller private labs	✓

Automated Assay Expansion – 1,25 Xpress

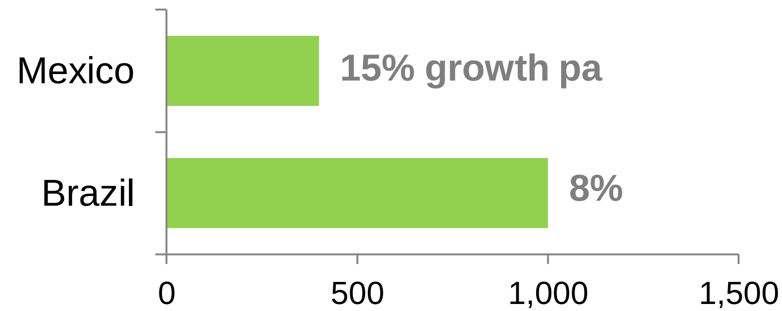
1995 RIA	2004 EIA	2012 iSYS	2014 Xpress
Immuno-capsules extraction	Immuno-capsules extraction	Immuno-capsules extraction	Automated particles immunoextraction
Radio-immunoassay	Enzyme immunoassay	Automated chemiluminescence assay	Automated chemiluminescence assay
Result in 24h	Result in 21h	Result in 5h	Result in 90min

- Measurement of 1,25 dihydroxy vitamin D deficiency associated with renal disease
- First automated assay on the market
- CE marked in April 2012 and FDA cleared in June 2013
- 1,25 Xpress – anticipated launch September 2014

Geographic Development – Entry into Brazil

- Brazil and China are the Group's focus for near-term expansion
- Subsidiary in Brazil established – IDS Brasil Diagnósticos Ltda
  - Initial focus Brazilian IVD market
  - Mexico
  - Remaining territories through distribution
- IDS Brazil team now established – led by Denise Schwartz
- First major customer secured in June 2014
- Product registration anticipated by Q3 2014/15

Estimated IVD market size ($m)



Large centralised labs ✓✓

Hospital labs ✓

Smaller private labs ✓

Financial Overview

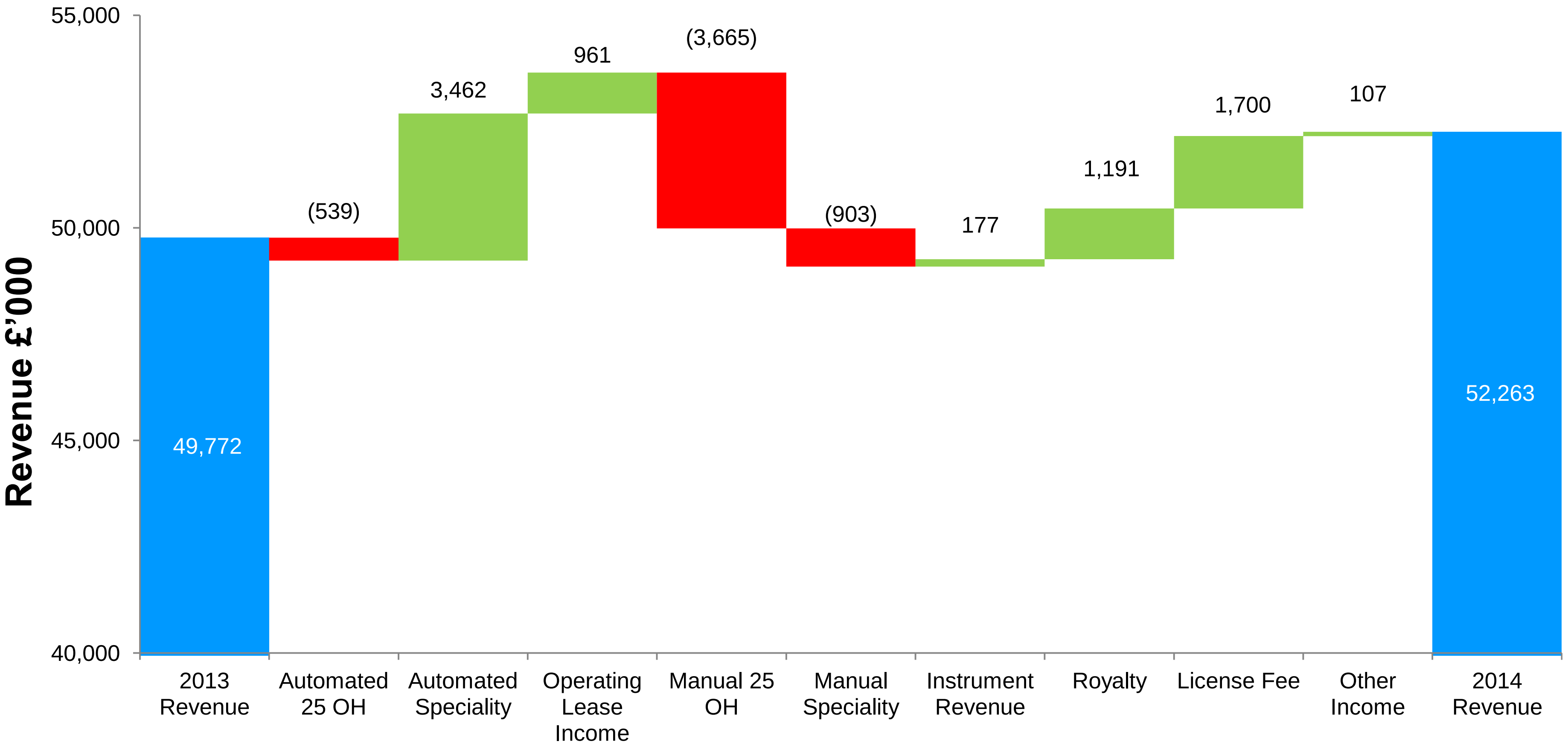
Innovation in Immunoassays

Income Statement

Year ended 31 March	**2014 £000**	2013 £000	% change
Revenue	**52,263**	49,772	5%
Gross Profit	**38,916**	36,371	
Gross Margin %	**74.5%**	73.1%	
Operating Costs	**(21,952)**	(20,110)	9%
EBITDA	**16,964**	16,261	4%
EBITDA Margin %	***32.5%***	*32.7%*	
Depreciation & Amortisation	**(6,846)**	(6,494)	
EBIT pre-exceptional	**10,118**	9,767	4%
EBIT Margin %	***19.4%***	*19.6%*	
Exceptional	**(1,860)**	246	
EBIT post-exceptional	**8,258**	10,013	
Net Interest	**77**	24	
PBT	**8,335**	10,037	
PBT pre-exceptional	***10,195***	*9,791*	

- Revenue in line with expectations, 5% above prior year
- Revenue growth versus prior year driven by growth in automated (21% above prior year) and Other income (98% above prior year)
- Gross margin 1.4% above prior year, reflecting change in product mix
- Operating costs 9% ahead of prior year, driven by average headcount increase of 21 FTEs
- EBIT pre-exceptional is 4% above prior year
- Dividend of 8.5 pence (2013: 3.0 pence), reflecting new dividend policy

Group Revenues

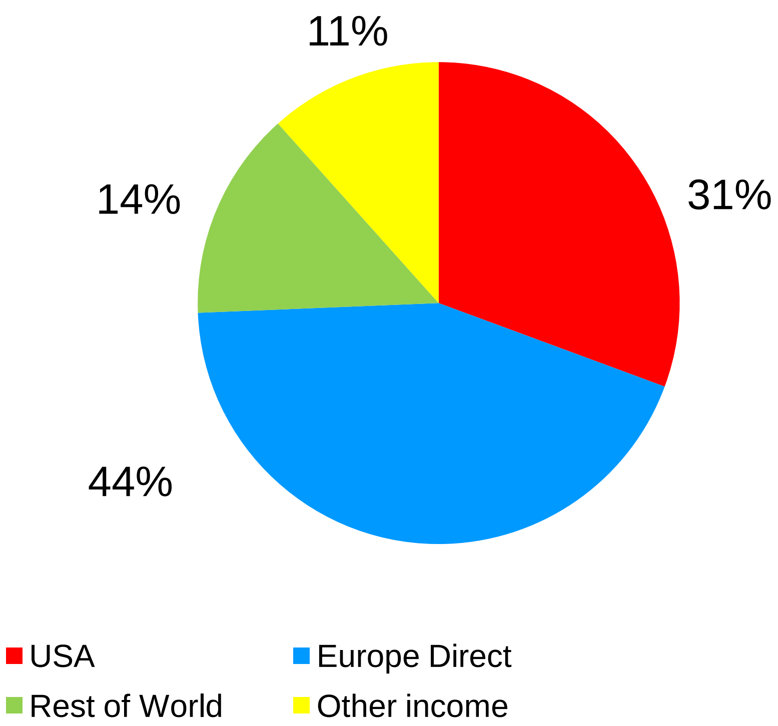


Revenue by Product

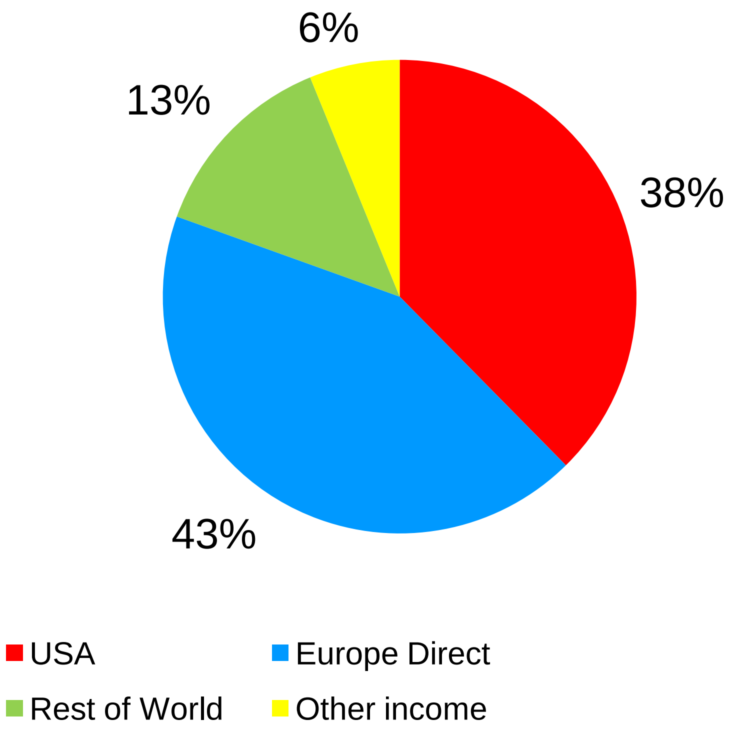
Year ended 31 March	2014 £000	2014 %	2013 £000	2013 %	% change
Automated revenue (IDS-iSYS)					
25OH vitamin D	**10,860**		**11,399**		(4.7)
Other specialty	**7,285**		**3,823**		90.6
Operating lease rental	**4,227**		**3,266**		29.5
Total automated	**22,372**	**42.8%**	**18,488**	**37.1%**	21.0
Manual revenue					
25OH vitamin D	**8,468**		**12,133**		(30.2)
Other specialty	**12,310**		**13,213**		(6.8)
Total manual	**20,778**	**39.8%**	**25,346**	**50.9%**	(18.0)
Instrument revenue	**3,043**	**5.8%**	**2,866**	**5.8%**	6.2
Other income	**6,070**	**11.6%**	**3,072**	**6.2%**	97.6
Total Revenue	**52,263**	**100.0%**	**49,772**	**100.0%**	5.0

Revenue by Location

2014



2013



IDS-iSYS Instrument Placements

Year ended 31 March	**2014**	2013
Direct – net placements	**35**	88
Direct – installed base to date	**298**	263
ARPI	**£71k**	£72k
Distributor – gross placements	**28**	23
Distributor – placements to date	**105**	77
OEM sales and partners	**29**	27

- Total instruments sold/placed were 92 (2013:138)
- Direct instrument placements were 35 (net of returns) (2013: 88)
- Reduced net placements caused by territory specific factors in USA and France

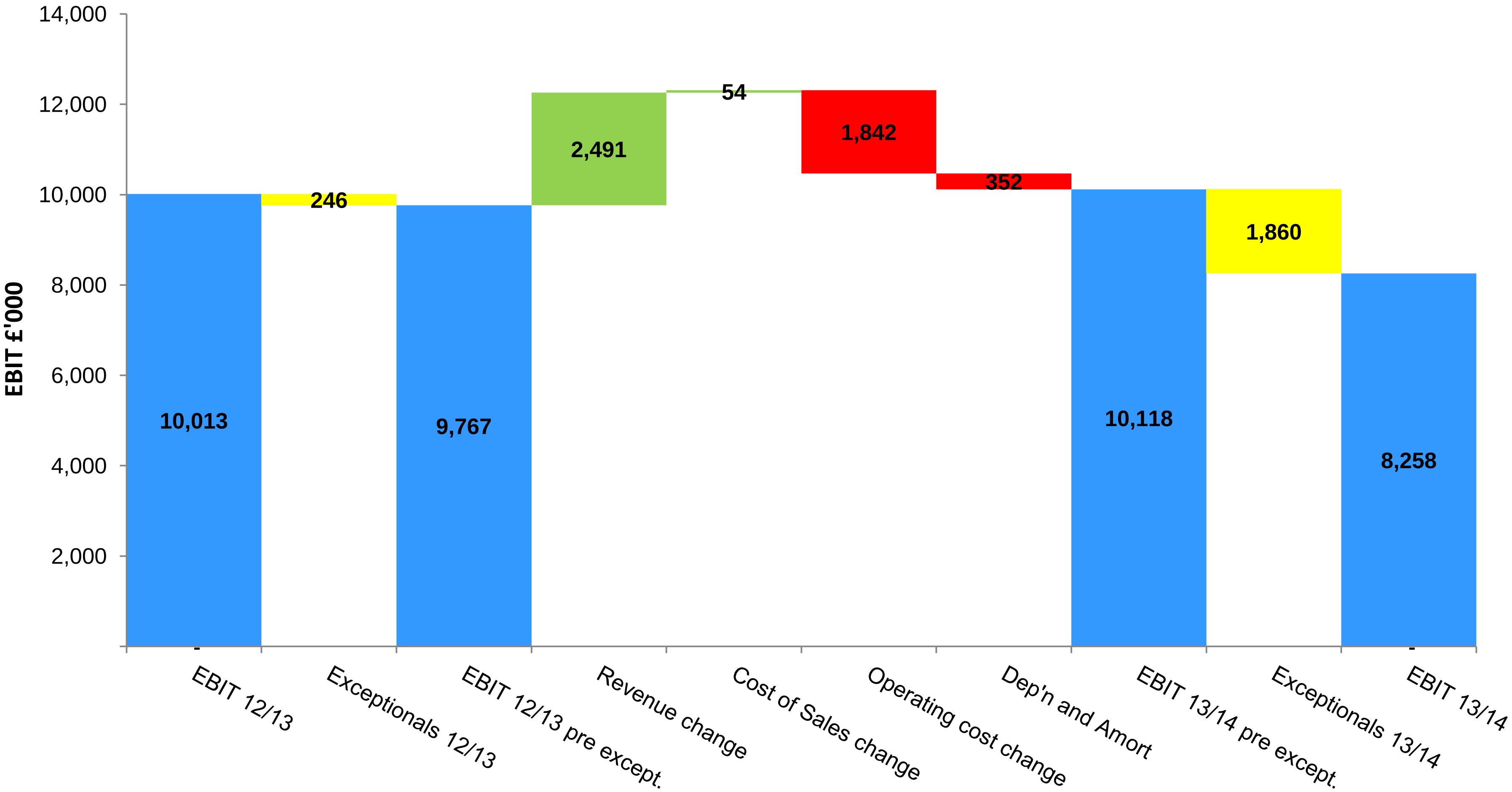
Operating Cost Analysis

	2014	2013	%
Year ended 31 March	£000	£000	change
Sales and distribution	**10,185**	8,143	25.1%
Research and development (net of capitalisation)	**2,161**	2,379	(9.2)%
Other administration costs (net of capitalisation)	**9,606**	9,588	0.2%
Operating overheads	**21,952**	20,110	9.2%
Depreciation	**2,682**	2,415	11.1%
Amortisation	**4,164**	4,079	2.1%
Pre-exceptional overheads	**28,798**	26,604	8.2%
Exceptional costs/ (income)	**1,860**	(246)	N/A
Total overheads	**30,658**	26,358	16.3%

Exceptional (Costs)/ Income

Year ended 31 March	**2014** **£000**	2013 £000
Release of provision against BHH receivable	**0**	1,505
Retirement of development costs	**0**	(794)
Impairment of assay development costs	**(317)**	(465)
Restructuring costs	**(1,160)**	0
Strategic review costs	**(244)**	0
Nattopharma legal defence costs	**(139)**	0
Total exceptional (costs)/ income	**(1,860)**	246

EBIT Bridge



14,000
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EBIT 12/13 pre except.
Revenue change
Cost of Sales change
Operating cost change
Dep'n and Amort
EBIT 13/14 pre except.
Exceptionals 13/14
EBIT 13/14

Cash Flow

Year ended 31 March	**2014**	2013
	£000	£000
Operating activities (pre Stago/BHH/Restructuring)	**15,631**	18,141
Restructuring	**(1,807)**	-
Stago license fee	**-**	1,715
BHH consideration settlement	**-**	1,505
Operating activities	**13,824**	21,361
Outflows:		
Tax	**(1,535)**	(3,005)
Development costs	**(3,748)**	(2,256)
Capex	**(2,308)**	(2,652)
Loan repayments	**-**	(4,152)
Dividends	**(866)**	(779)
Share issue	**1,784**	-
Other	**(26)**	17
Net increase in cash	**7,125**	8,534

Balance Sheet

As at 31 March	**2014 £000**	2013 £000
Cash	**26,690**	19,565
Fixed assets	**59,923**	63,257
Net current assets*	**8,088**	5,459
Non current liabilities	**(8,115)**	(8,488)
Net assets	**86,586**	79,793

*Excluding cash

2014/15 Outlook

- Trading for first two months of current year in line with management expectations
- Modest revenue increase in 2014/15 will be dependent, *inter alia*, on:
  - The rate of pick up in level of net placements compared to 2013/14, which is dependent on success in a number of significant contract opportunities
  - Timing of launch of our new 1,25 automated assay
  - Successful registrations of our products in Brazil and China
  - Rate of manual revenue decline
- Strategic plan we set out today offers significant growth potential over medium-term
- To execute this plan we will continue to invest in upgrading our operational infrastructure
- Plan builds on IDS's heritage in endocrinology and seeks to leverage significantly the IDS-iSYS instrument platform through assay menu expansion

Strategic Update:

Unlocking new opportunities to secure future growth

Innovation in Immunoassays

IDS Today:

An established, profitable and integrated IVD group

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Company Overview

- **Integrated immunoassay group:**
  - Leading position in endocrinology
  - Integrated instrument and assay development capabilities
  - Range of assay technologies and detection modalities
- **Clinical diagnostic laboratory market**
  - From physician office labs (POL) through large reference labs
- **Products sold in 60 Countries and 6 Continents**
  - Direct Sales: United States and core European markets
  - Global Distribution Network: 48 countries, including: Spain, Italy, Australia, China and Canada
- **European operations and international sales footprint**
  - Sales Offices: UK , France, Germany, USA, Denmark, Brazil
  - Manufacturing and R&D Sites: UK, Belgium, France

Disease Expertise: Endocrinology Assay Menu (as of March 2014)

13 CE-marked proprietary assays

29 assays under partnership

Automated IDS-iSYS Immunoassay System

Compact, bench top

Full walk away automation

Up to 120 tests / hour

IDS Today:

Building on a long heritage in endocrinology

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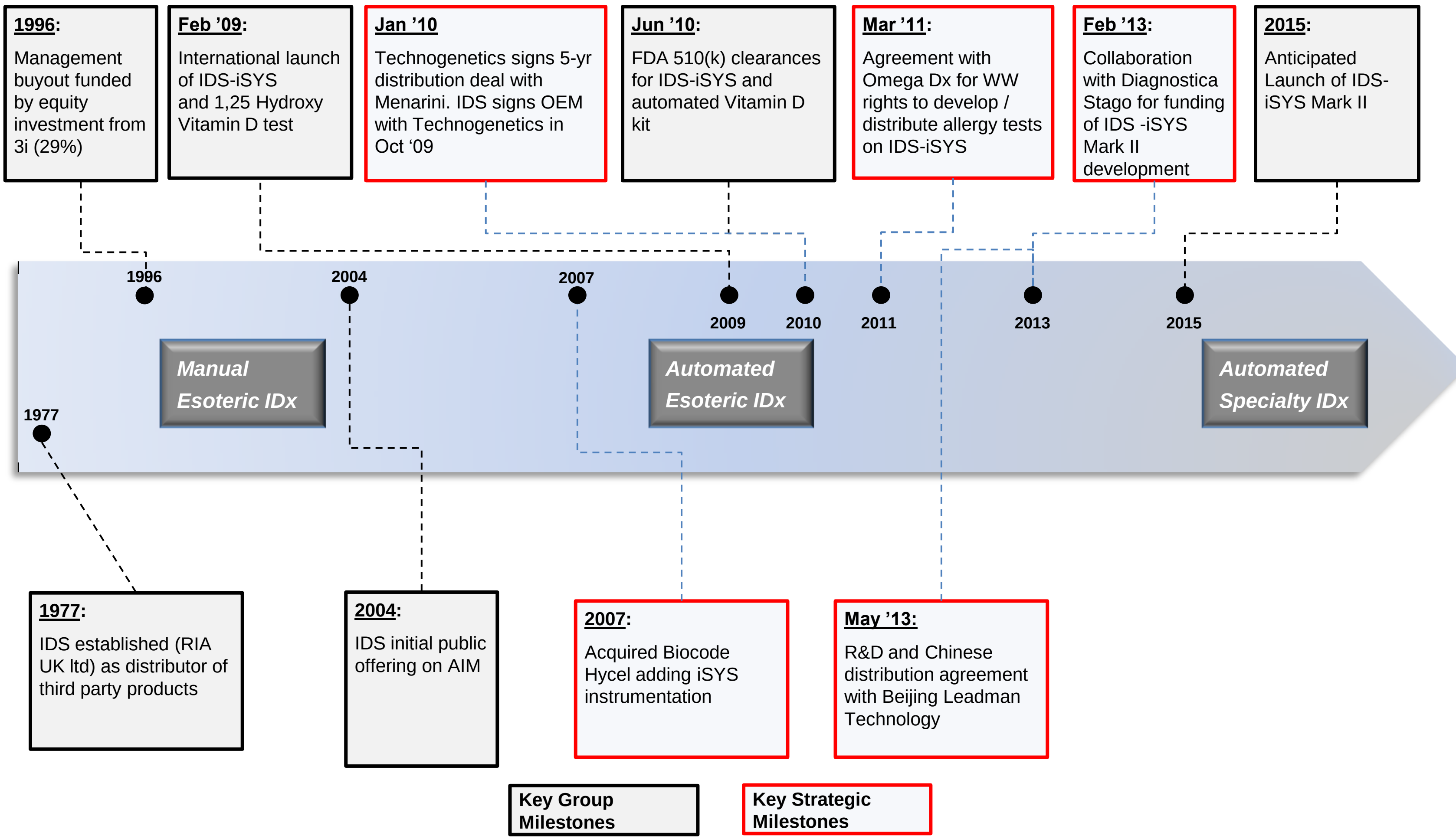

IDS Today:

Time to unlock new opportunities to secure future Growth

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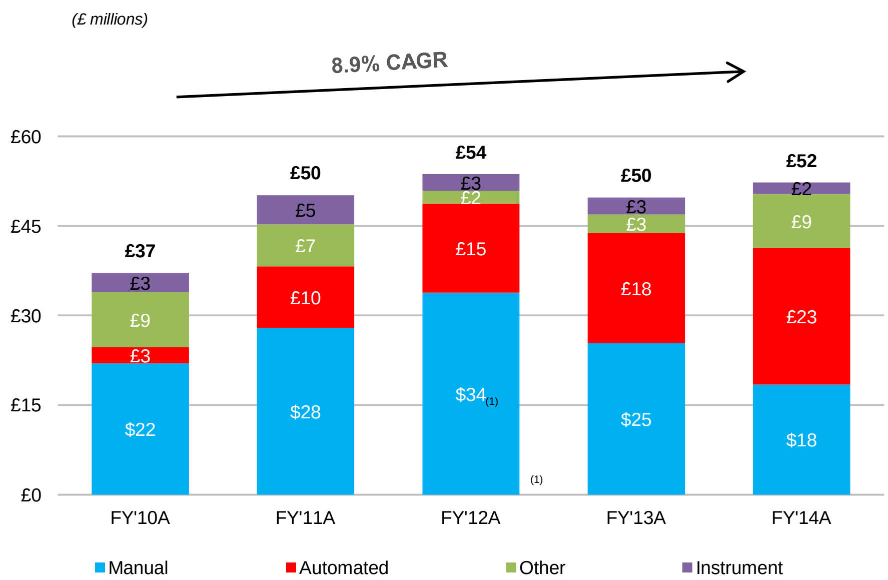
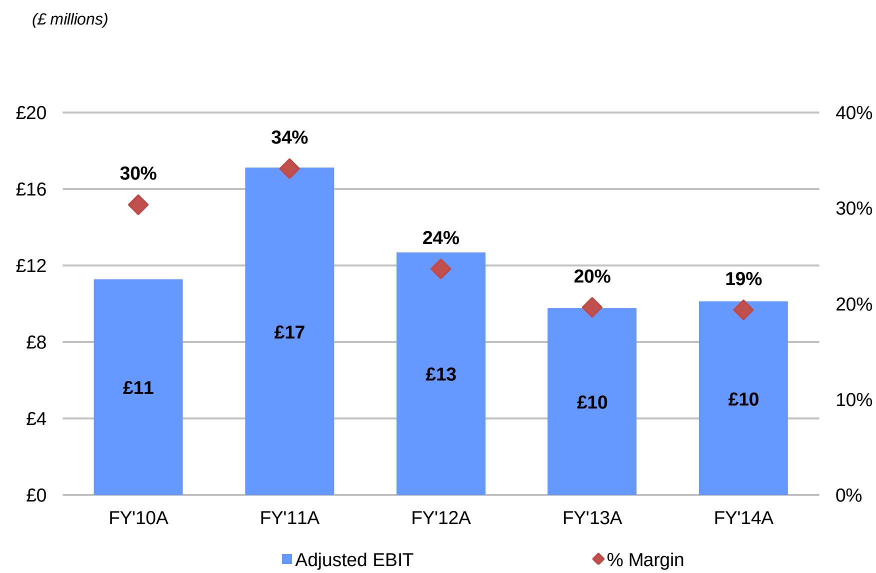
Historical Revenue / Growth



Historical EBIT / Margin



An Experienced Management Team

New blood but "grey hair"- average of 20 years in the industry

Patrik Dahlen
Chief Executive Officer
2 years at IDS
25 years industry

Chris Yates
Chief Financial Officer
1 year at IDS
10 years industry

Alain Rousseau
Engineering Director
6 years at IDS
20 years industry

Hans-Werner Griesser
Technical Director
1 year at IDS
29 years industry

Jorge Cerda
Operations Director
1 year at IDS
25 years industry

Karim Tabiti
Group Marketing Director
1 year at IDS
17 years industry

Nicola Trewin
Group HR Manager
1 year at IDS
17 years in HR

Building a Leading Specialty IDx Player

Key building blocks for expansion in place

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Key Building Blocks	Avenues for Growth	2019 Target
Heritage in Building Deep and Broad Endocrinology Assay Coverage	**Assay Menu Expansion**	**Automated Assay Expansion** *+80*
IDS-iSYS: A State of the Art Technology Platform	**Development of Next-Generation Automated System**	**Installed Base Growth** *+1,000*
Unique Market Positioning	**Expand Commercial Presence**	**Doubling of Revenue**

Immunoassay Market

IDS's development strategy is focused on higher growth segments of the immunoassay market

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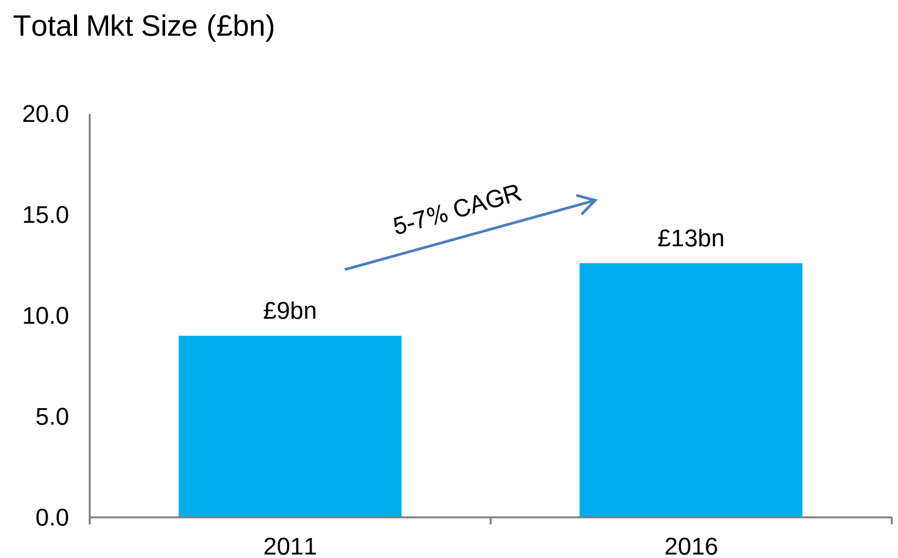
Immunoassay Market Trends

Immunoassays continue to play a dominant role in clinical laboratory medicine:

- Clinical Significance
- Moving Closer to the Patient
- Improved and Retained Economics
- Enabling Greater Operational Efficiencies
- Broader and More Specialized Testing Menus

Market Opportunity



IDS is Focused on High Growth Markets

	Vitamin D	Autoimmune	Specialty Infectious Disease	Emerging Markets
Growth rates	***~15%***	***~7%***	***~8%***	***~10%***

Vitamin D Market Still Offers Growth Potential

IDS's vitamin D assay meets CDC clinical guidelines

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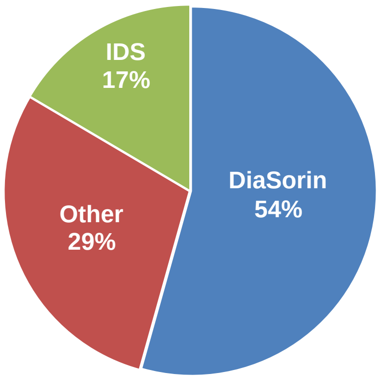
Estimated Vitamin D Market Share



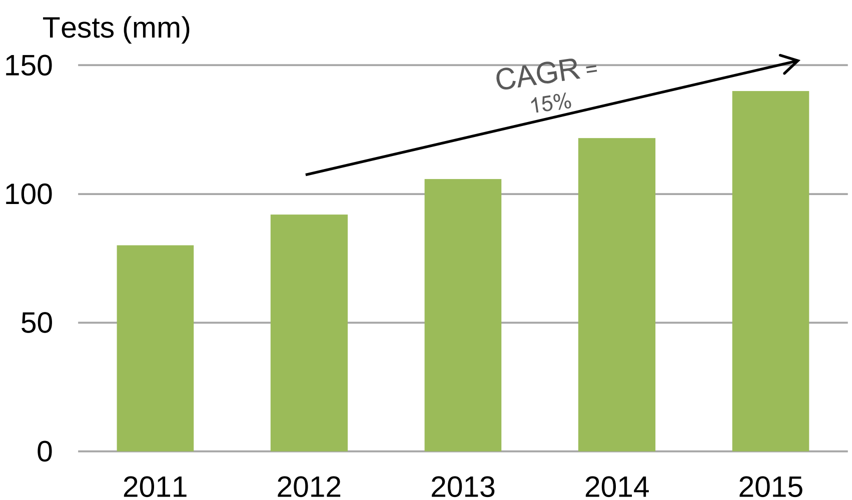
New Entrants

SIEMENS

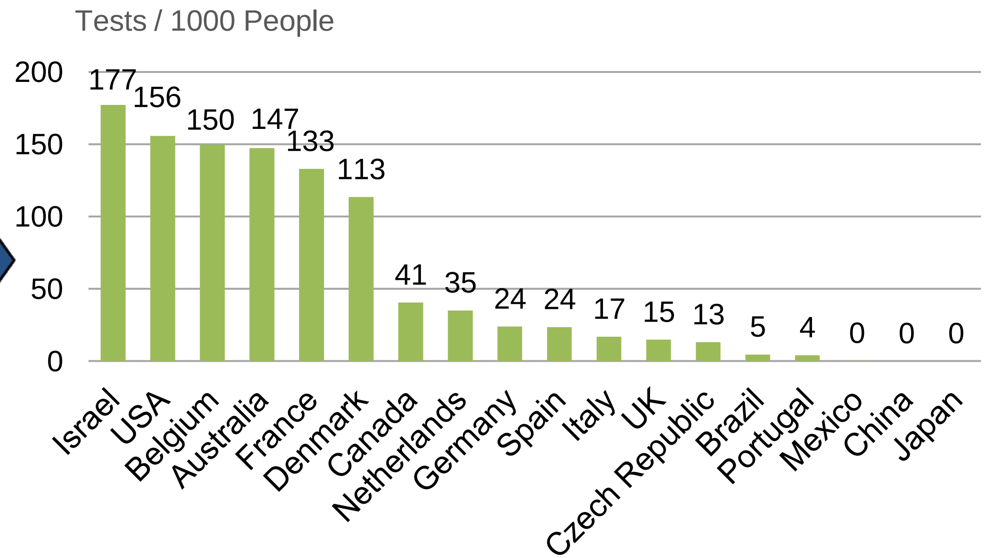
Roche

Abbott

Growing Volume of Testing



Further Growth Driven by Increase in Testing Prevalence



Growing the addressable market:

Menu expansion and Mark II launch

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Leading Automated Specialty IDx Player

	Assay Menu Expansion	**Development of Next Generation Automated System**	**Deepen and Expand Sales Presence**
Objectives	80+ proprietary and partnered assays to be added over the next 5 years	Leading solution provider delivering a compact, flexible and fully automated system	Market leading long-term growth with scale and presence in selected key markets
Overview	Endocrinology Excellence: Full menu offering of automated high-throughput esoteric assays Broad Penetration: Additional menu developed through partnerships	Commercialisation and European launch of IDS-iSYS Mark II in mid-2015	Core: Enhance sales force in U.S. and Europe Growth: Establish presence in Brazil and China Building distributor base

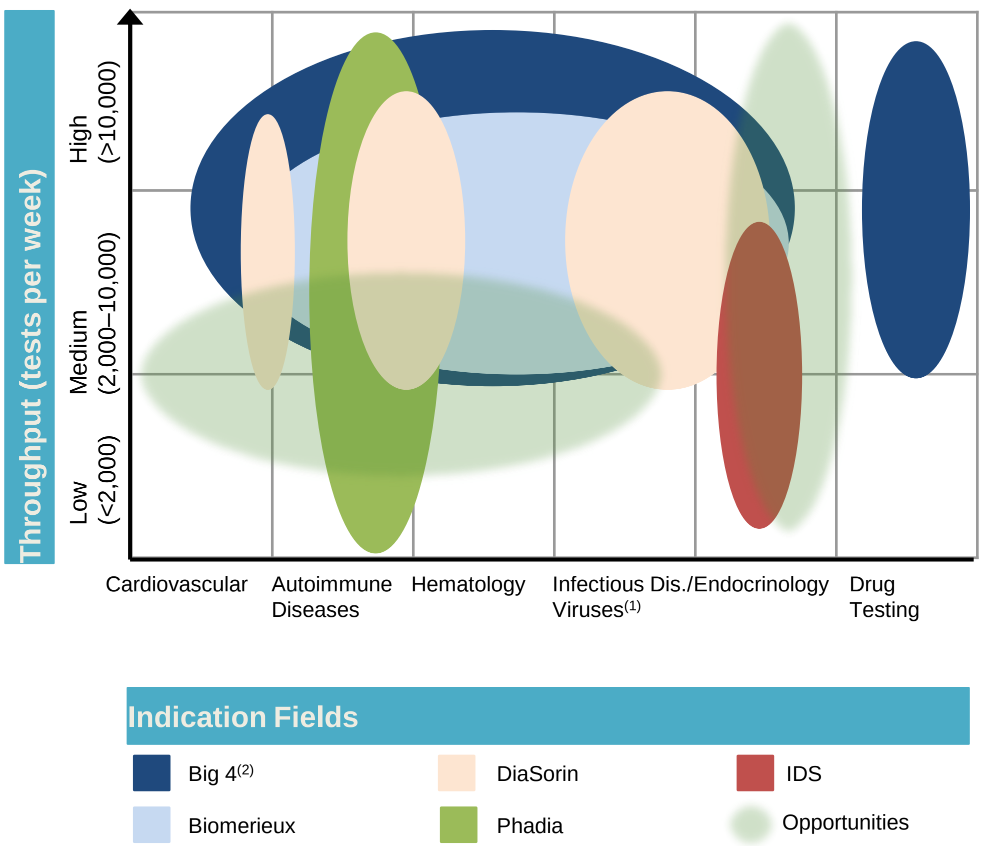
2019 Goals

80+ increase in assays menu	***1,000+ increase in installed base***	***Double Revenue***

Current indication coverage:

Clear opportunities for leadership in
i) Endocrinology and ii) Provision of smaller lab solution

Indication coverage



Observations

- **Big 4** dominate the routine high throughput testing market
- **Low-to-medium throughput demand** served mainly by smaller players catering to retail and POLs
- **Endocrinology** remains relatively underpenetrated

Key Opportunities for IDS

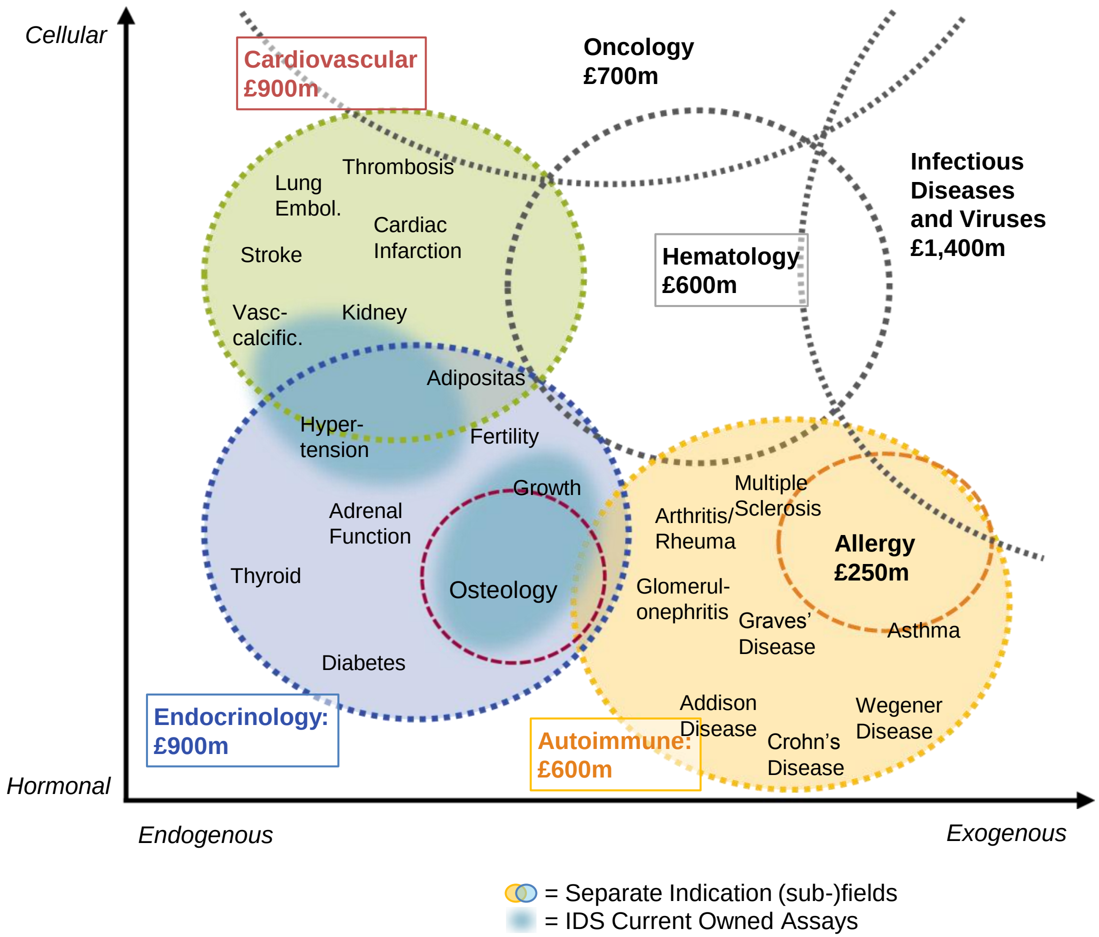
Definitive leadership across Endocrinology

Provider of choice for smaller labs across broad range of complementary indications

Leveraging our Endocrinology Expertise:

Moving into related clinical areas

Indication Landscape



IDS Market Potential

Indication	Opportunity	Specialty Share
Endocrinology	£900m	£500m
Cardiovascular	£900m	£200m
Hematology	£600m	£200m
Autoimmune	£600m	£100m
Total	**£3,000m**	**£1,000m**

The Mark II Instrument:

Enhanced capabilities will drive expansion

	Current: IDS-iSYS System	Next Generation: IDS-iSYS Mark II
Connectivity	Software interface with real-time monitoring, guided assay calibration and maintenance	+ Connectivity to LIMS and patient tracking systems
Footprint	Compact, bench-top design	+ Reduced footprint with capacity for 15 ready-to-use cartridges
Throughput	Up to 120 tests/hour with continuous loading , batch, random and STAT flexibility	+ 30% faster turnaround time with capacity of up to 150 tests/hour
Modality	Immunoassay and biochemistry enabling expansion into POL market	+ Coagulation in addition to existing modality
Cost		+ c.30% reduction in manufacturing cost

Next-Generation

Increased Penetration

- Dedicated Sales & Marketing
- Broaden Assay Offering
- Distribution Agreements

Displacement

- Improve workhouse usage | Focus: Generic Systems
- Save lab space | Focus: Outdated Complementary Systems
- Reduce management complexity | Focus: Semi-Automated Systems

Sales & Distribution

Deepen our presence in core territories and expand into growth markets

Large, High Throughput → *Small, Low Throughput*

	Giant	Specialist	Generalist	Retail
	High throughput routine testing on multiple integrated systems across multiple tracks	Lab with routine and specialist testing in certain fields on dedicated systems	Lab focused on routine testing with medium throughput testing on several systems	Lab for single or group physician office laboratory with focus on specific indications
Customers	>30	>300	>5,000	>10,000
Global KAM	✓			
IDS Sales Force		✓	✓	✓
Partner			✓	✓
Rented Sales Force			✓	✓
Online			✓	✓

Europe and the US

- Develop attractive and competitive assay menu to enter new countries
- Beginning to penetrate the POL market
- IDS-iSYS Mark II launch in Europe in H1 2015 accelerates growth
- Focused expansion of sales force

Expansion of Direct Footprint

- Brazil and China offer double digit growth rates
- Brazilian subsidiary and sales team established in May 2014

Distribution Footprint

- Cost advantage of IDS-iSYS Mark II is catalyst for growth
- China expansion driven by Leadman
- Brazilian office will act as a hub for South America

Customer Matrix:

Endocrinology Excellence Menu will drive growth in giant & specialist market segments

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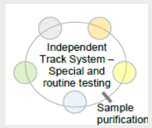
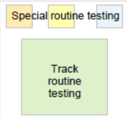
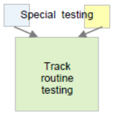
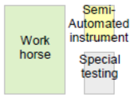
Endocrinology Excellence Menu → ***Small, Low Throughput***

	Giant	Specialist	Generalist	Retail / POL
Description	 High throughput testing on multiple integrated systems on track systems	 Lab with routine testing and specialist testing in certain fields on dedicated systems	 Lab focused on routine testing with some medium-throughput testing on several systems	 Lab for single or group POL with focus on specific indications
Customer Type	▪ Large reference labs	▪ University hospitals ▪ Lab associations	▪ Hospitals >800 beds ▪ Hospitals with high lab out-reach	▪ Private doctors ▪ Hospitals ≤800 beds
# of Target Customers	>30	>300	>5,000	>10,000
Central Needs	▪ Efficiency of track system ▪ Specific selection of medium throughput parameters	▪ High quality assays and testing parameter on dedicated systems	▪ Constantly optimizing system load and workflow on flexible side systems ▪ Few sets of related medium throughput parameters	▪ Optimizing lab portfolio on primary and side systems ▪ Few specialist high-quality parameter sets
Total Idx Tests p.a. / Running Time	>5mm 24 / 7	1 – 5mm 24 / 7	1 – 5mm 24 / 7	<1mm 12 / 5
IDS Usage Today	1,25-dihydroxy vitamin D standalone or growth standalone	1,25-dihydroxy vitamin D growth standalone, or esoteric panel testing	Vit D standalone	Vit D standalone and manual kits

Customer Matrix:

Broad Penetration Menu will drive growth in generalist & retail/POL market segments

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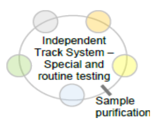
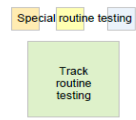
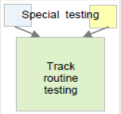
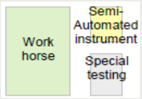
Large, High Throughput

Broad Penetration Menu

	Giant	Specialist	Generalist	Retail / POL
Description	 High throughput testing on multiple integrated systems on track systems	 Lab with routine testing and specialist testing in certain fields on dedicated systems	 Lab focused on routine testing with some medium-throughput testing on several systems	 Lab for single or group POL with focus on specific indications
Customer Type	▪ Large reference labs	▪ University hospitals ▪ Lab associations	▪ Hospitals >800 beds ▪ Hospitals with high lab out-reach	▪ Private doctors ▪ Hospitals ≤800 beds
# of Target Customers	>30	>300	>5,000	>10,000
Central Needs	▪ Efficiency of track system ▪ Specific selection of medium throughput parameters	▪ High quality assays and testing parameter on dedicated systems	▪ Constantly optimizing system load and workflow on flexible side systems ▪ Few sets of related medium throughput parameters	▪ Optimizing lab portfolio on primary and side systems ▪ Few specialist high-quality parameter sets
Total Idx Tests p.a. / Running Time	>5mm 24 / 7	1 – 5mm 24 / 7	1 – 5mm 24 / 7	<1mm 12 / 5
IDS Usage Today	1,25-dihydroxy vitamin D standalone or growth standalone	1,25-dihydroxy vitamin D growth standalone, or esoteric panel testing	Vit D standalone	Vit D standalone and manual kits

Customer Matrix:

Next generation IDS-iSYS Mark II will support growth in all market segments and distribution market

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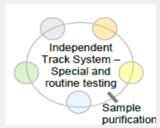
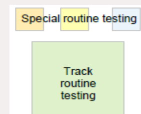
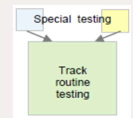
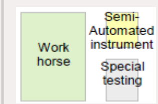
Next Generation IDS-iSYS Mark II

	Giant	Specialist	Generalist	Retail / POL
Description	 High throughput testing on multiple integrated systems on track systems	 Lab with routine testing and specialist testing in certain fields on dedicated systems	 Lab focused on routine testing with some medium-throughput testing on several systems	 Lab for single or group POL with focus on specific indications
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Concluding Remarks

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- Leading solution provider to clinical laboratory diagnostic market
- Building on our core strengths: IDS-iSYS instrument, reputation for quality & heritage in endocrinology
- Automated assay development strategy is core:
  - Market leading endocrinology assay menu – internally developed
  - Broader, complementary menu - developed through partnership
- 5 Year Targets: Doubling of revenue, 1000+ increase in installed base, 80+ increase in assay menu
- **Opportunity to deliver significant and sustainable shareholder value in the medium-term and beyond**

Appendices

Innovation in Immunoassays

Assay Menu Expansion

Proprietary Assays

Endocrinology Excellence

Disease Area	Markers	Manual	Automated	Automated Pipeline
Bone Metabolism	Bone Alkaline Phosphatase	CE/FDA	CE	• N-MID® Osteocalcin (FDA)(1) • Intact P1NP (FDA)(1) • BAP (FDA)(1) • Matrix-Gla-Protein (MGP) • TRAcP 5b (BoneTRAP®)
	BoneTRAP	CE/FDA	CE	
	CTX-I	CE/FDA	CE	
	CTX-II	CE/RUO	--	
	Intact P1NP	CE/FDA	CE	
	N-MID® Osteocalcin	CE/FDA	CE	
Calcium Metabolism	25-Hydroxy Vitamin D	CE/FDA	CE/FDA	• 1,25-Dihydroxy Vit Dxp
	1,25-Dihydroxy Vitamin D	CE/FDA	CE/FDA	
	Intact PTH	--	CE/FDA	
	PTH (1-34)	--	RUO	
Growth Factors	Human Growth Hormone	--	CE/FDA	• Metanephrine
	Insulin-like Growth Factor-I	CE/FDA	CE/FDA	
	Insulin-like Growth Factor Binding Protein-3	--	CE/FDA	
Hypertension	Direct Renin	--	CE/FDA	• Aldosterone (FDA)(1) • Cortisol • ACTH
	Aldosterone	RUO	CE	
	Corticosterone	--	RUO	
Fertility	--	--	--	• 17-OH-Progesterone • Free testosterone; AMH

Selected Automated Partnered Assays

Broad Penetration

Disease Area	Selected Partnered Assays
Autoimmune	Technogenetics (22)
Infectious Disease	Technogenetics (7)
Allergy	Omega (40)
Diabetes	Leadman (5)
Fertility	Leadman (8)
Thyroid	Leadman (8)

Endocrinology Excellence Menu

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Endocrinology Excellence Menu

2014 — **2016** — **2019**

Assay Target List

Pipeline
Completion of assays already in pipeline

- 1,25D (fully automated)
- ACTH
- Cortisol
- MGP
- Thyroglobulin Tg
- TRAcP5b

Expansion
Development of highly recommended assays

- 17-OH-Progesterone
- AMH
- DHEA-S
- Free Testosterone
- Metanephrine
- TRAK

Future Opportunities
Completion of specialist menu

- Adrenalin
- Androstendion
- Calcitonin
- DHT
- Noradrenalin
- NTx
- FGF-23
- OGP
- Pyrilins-D
- Sclerostin

Broad Penetration Menu

Broad Penetration Menu

2014 — **2016** — **2019**

Assay Target List

Integration

Integration of Technogenetics & Leadman assays into menu

Technogenetics-Autoimmune portfolio:
- (22 autoimmune and 7 specialty assays)

Leadman-Generic Endocrin. portfolio[(1)]
- Diabetes (5 assays)
- Fertility (8 assays)
- Thyroid (8 assays)

Stago-Thrombosis & Hematology portfolio[(1)]

Expansion

Addition of further assays across multiple complementary indications to portfolio via existing partnerships and two additional collaborations

Fertility:
- SHBG
- sFLT1
- AFP HE-4
- sPAPPA
- Inhibin A

Vasc. Calcif.:
- Fetuin-A
- mGLA

Thyroid:
- TSHR
- TSH
- TSI

Liver:
- HA
- LN
- CIV

Kidney:
- Adiponectin
- IL-2 receptor

Thrombosis:
- D-Dimer
- D-Dimer II
- Plasminogen

Cardiac & Stroke:
- HBDH
- HPLC
- hsCRP
- ß2-G. IgG/IgM/IgA
- PTH
- sCD40L
- TIMP
- Ti-Q. CRP
- TnI

Anemia:
- EPO
- NGAL
- sTfR

Inflammation:
- IL-1B
- IL-2R
- IL-6
- IL-8
- IL-10
- LBP
- TNF-a