

27 June 2023



# Meet GSK management Getting ahead of infectious diseases

Interactive event for investors and analysts. This webinar is being recorded.

# Cautionary statement regarding forward-looking statements

This presentation may contain forward-looking statements. Forward-looking statements give the Group's current expectations or forecasts of future events. An investor can identify these statements by the fact that they do not relate strictly to historical or current facts. They use words such as 'anticipate', 'estimate', 'expect', 'intend', 'will', 'project', 'plan', 'believe', 'target' and other words and terms of similar meaning in connection with any discussion of future operating or financial performance. In particular, these include statements relating to future actions, prospective products or product approvals, future performance or results of current and anticipated products, sales efforts, expenses, the outcome of contingencies such as legal proceedings, dividend payments and financial results.

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A number of adjusted measures are used to report the performance of our business, which are non-IFRS measures. These measures are defined and reconciliations to the nearest IFRS measure are available in the Q1 2023 earnings release and Annual Report on Form 20-F for FY 2022.

All guidance, outlooks, ambitions and expectations should be read together with the Guidance, assumptions and cautionary statements in GSK's Q1 2023 earnings release and the 2022 Annual Report.

Basis of preparation: GSK satisfied the formal criteria according to IFRS 5 for treating Consumer Healthcare as a 'Discontinued operation' effective from 30 June 2022. On 18 July 2022, GSK plc separated its Consumer Healthcare business from the GSK Group to form Haleon, an independent listed company. Comparative figures have been restated on a consistent basis. Earnings per share, Adjusted earnings per share and Dividends per share have been adjusted to reflect the GSK Share Consolidation on 18 July 2022.

# Speakers



**Emma Walmsley**  
Chief Executive Officer



**Dr Tony Wood**  
Chief Scientific Officer



**Luke Miels**  
Chief Commercial Officer



**Dr Phil Dormitzer**  
SVP, Global Head,  
Vaccines R&D



**Christi Kelsey**  
SVP, Global Head,  
Vaccines Commercial



**Dr Kumaran Vadivelu**  
Head of Vaccines  
Development, R&D



**Rob Bowers**  
Head of General  
Medicines, Commercial



**Chris Corsico**  
SVP, Development, R&D



**James Greenhalgh**  
SVP, Specialty Care,  
Commercial



**Lizzie Champion**  
VP, *Shingrix*, Vaccines  
Commercial



**Deborah Waterhouse**  
CEO, ViiV Healthcare and  
President, Global Health, GSK



**Dr Thomas Breuer**  
Chief Global Health Officer

# Agenda

Getting ahead of infectious disease

Emma Walmsley

World leader in infectious diseases R&D

Dr Tony Wood

Delivering profitable growth to 2026 and beyond

Luke Miels

## Breakout sessions



**Breakout 1: Seasonal respiratory viruses**  
Dr Phil Dormitzer and Christi Kelsey



**Breakout 2: Bacterial and fungal infections**  
Dr Kumaran Vadivelu and Rob Bowers



**Breakout 3: Chronic viral infections**  
Chris Corsico, Lizzie Champion and James Greenhalgh



**Breakout 4: Delivering health impact at scale**  
Deborah Waterhouse and Dr Thomas Breuer

Q&A

Tony Wood, Luke Miels, Deborah Waterhouse



# Getting ahead of infectious disease

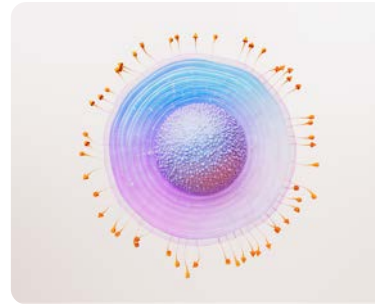
Emma Walmsley, Chief Executive Officer

# A focused global biopharma company with strong momentum and big ambitions

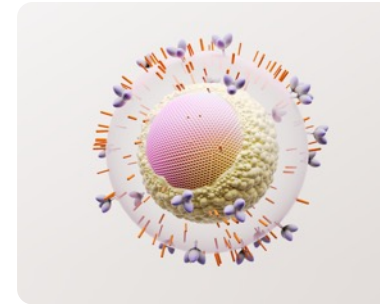
- Unique strategy focused on prevention and treatment of disease
- World leader in infectious diseases with an attractive broader pipeline based on the science of the immune system and advanced technology
- Competitive medium-term sales and profit outlook supported by landmark 2022 and continued momentum
- Confident in ability to sustain profitable growth through decade and beyond to deliver human health impact at scale

## Meet GSK management series 2023

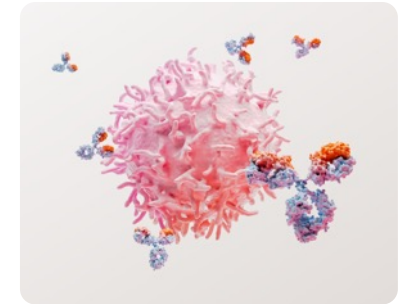
Three virtual events highlighting GSK's growth prospects and expertise in preventing and treating disease



Infectious diseases



HIV



Immunology/  
respiratory

Potential first- or best-in-class vaccines and medicines that offer potential future sales and profitable growth in targeted and attractive market opportunities at scale

# Uniting science, technology and talent to get ahead of disease together

## Infectious disease vaccine pipeline

44

## Sales from infectious diseases<sup>1</sup>

£16bn

### World leader in infectious diseases

- For more than 70 years, GSK has pioneered novel research methods and technologies to help protect people from infectious diseases caused by bacteria, viruses and parasites
- Broadest portfolio in the industry and market-leading in multiple categories, e.g. shingles, meningitis, and paediatrics
- Leading biopharma company in total adult immunisation schedule with current best-in-class shingles and RSV vaccines
- World-class manufacturing, regulatory and technical expertise that create high barriers to entry
- Increasing synergies in preventing infectious disease and treating chronic conditions

### Focused on earlier intervention and prevention

- Earlier intervention and prevention, and vaccination across all ages can change the course of disease and prevent serious complications
- Investment in prevention will benefit patients, society, and global economies, potentially reducing the \$1 trillion lost each year in productivity by the G20 due to preventable conditions

### Delivering health impact at scale

- Infectious disease portfolio will reach around half of the more than 2.5 billion people we will reach this decade

### Significant societal burden leading to 1 in 6 deaths or further health complications for patients

- Approximately 330,000 older adults are hospitalised globally each year with RSV<sup>2</sup>
- 1 in 3 people will develop shingles in their lifetime<sup>8</sup>, sometimes with serious consequences such as long-term nerve pain and vision loss<sup>3</sup>
- Seasonal influenza infects between 3-11% of people<sup>4</sup> causing a significant loss in economic productivity
- There are approximately 300 million people with chronic hepatitis B, and around 900,000 deaths from liver disease-related consequences<sup>5</sup>
- Anti-microbial resistance is a top-10 public health threat and caused approximately 1.3 million deaths in 2019<sup>6</sup>

Infectious disease market expected to grow to £105<sup>7</sup> billion by 2028, potentially delivering resilient revenues, high margins, and profitable growth for GSK

1. Full-year 2022 sales, including vaccines, HIV, Xevudy and pandemic vaccines 2. PubMed. Global Disease Burden Estimates of Respiratory Syncytial Virus-Associated Acute Respiratory Infection in Older Adults in 2015: A Systematic Review and Meta-Analysis. Accessed June 2023. Available at: <https://pubmed.ncbi.nlm.nih.gov/30880339/> 3. Centers for Disease Control and Prevention. About Shingles (Herpes Zoster). Accessed June 2023. Available at: <https://www.cdc.gov/shingles/about/index.html> 4. Centers for Disease Control and Prevention. Key Facts About Influenza (Flu). Accessed June 2023. Available at: <https://www.cdc.gov/flu/about/keyfacts.htm> 5. World Health Organization. Hepatitis B. Accessed June 2023. Available at: <https://www.who.int/news-room/fact-sheets/detail/hepatitis-b> 6. Lancet. Global burden of bacterial antimicrobial resistance in 2019: a systematic analysis. Accessed June 2023. Available at: [https://www.thelancet.com/journals/lancet/article/PIIS0140-6736\(21\)02724-0/fulltext](https://www.thelancet.com/journals/lancet/article/PIIS0140-6736(21)02724-0/fulltext) 7. EvaluatePharma, May 2023 8. Harpaz R et al. Advisory Committee on Immunization Practices (ACIP), Centers for Disease Control and Prevention (CDC). Prevention of herpes zoster: recommendations of the Advisory Committee on Immunization Practices (ACIP). MMWR Recomm Rep. 2008;57(RR-5):1-30



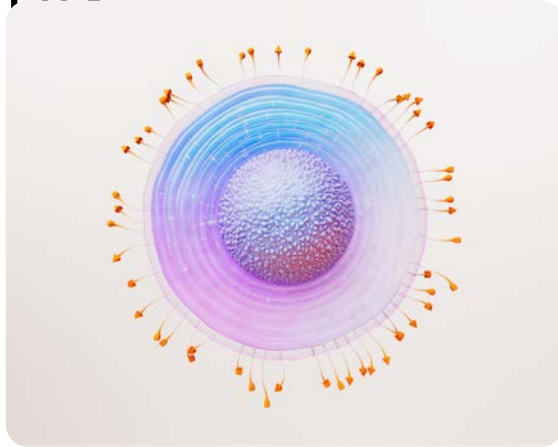
# World leader in infectious diseases R&D

Dr Tony Wood, Chief Scientific Officer



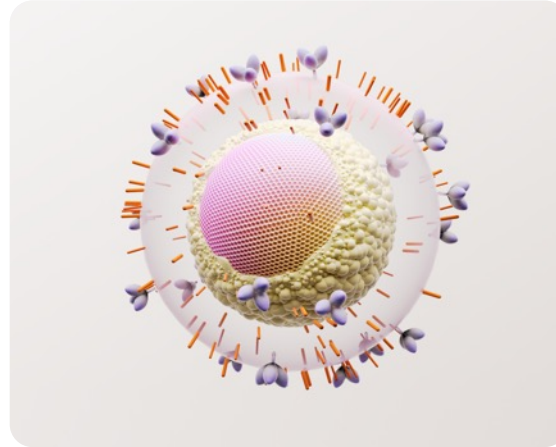
# Four focused therapeutic areas

Two thirds of our development portfolio comes from infectious diseases and HIV



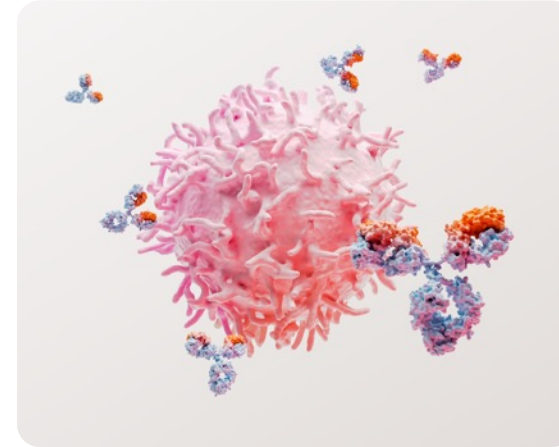
## Infectious diseases

*Shingrix*  
*Arexvy*<sup>1</sup>  
MenABCWY  
bepirovirsen  
*Brexafemme*  
gepotidacin  
tebipenem  
Pneumococcal 24-valent  
mRNA influenza  
*Herpes simplex virus*  
*gonorrhoea*



## HIV

Long-acting and ultra-long acting  
*Apretude*<sup>2</sup>  
N6LS (bNAb<sup>3</sup>)  
3<sup>rd</sup> generation INSTI<sup>4</sup>  
Capsid inhibitor



## Immunology/respiratory

depemokimab  
*Nucala* (COPD<sup>5</sup>)  
GSK4532990 (NASH<sup>6</sup>)  
camlpixant



## Oncology

momelotinib  
*Jemperli*  
cobolimab  
CD226 axis

Advanced technology and data platforms with targeted business development



Note: select pipeline programmes shown

1. Respiratory syncytial virus in older adults

2. Long-acting injectable option for HIV prevention

3. Broadly neutralising antibody

4. Integrase strand transfer inhibitor

5. Chronic obstructive pulmonary disease

6. Non-alcoholic steatohepatitis

# A focused biopharma company

Uniting science, technology and talent to get ahead of disease together

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## Execution

Focus on pipeline acceleration and complementary business development (assets and platforms) to deliver innovative vaccines and medicines

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## Technology

Using platform and data technology to deliver scale innovative vaccines and medicines better and faster

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## Culture

Building a culture that is ambitious for patients; attracting top talent, partners, and highly skilled scientists

# Infectious diseases

A significant and growing burden to patients and society

## Seasonal respiratory viruses

Respiratory syncytial virus

**~330k**

annual older adult hospitalisations<sup>1</sup>

Influenza

**~1 billion**

people infected annually<sup>2</sup>

SARS-CoV-2

**>750 million**

confirmed cases worldwide<sup>3</sup>

## Bacterial and fungal infections

Meningococcal disease

**~2.5 million**

people infected annually<sup>4</sup>

Pneumococcal disease

**~1 million**

globally deaths annually<sup>5</sup>

Urinary tract infections

**~15 million**

episodes in the US annually<sup>6</sup>

## Chronic viral infections

Herpes zoster virus (shingles)

**~1 million**

people in the US infected annually<sup>7</sup>

Hepatitis B virus

**>300 million**

people living with HBV<sup>8</sup>

Herpes simplex virus

**~500 million**

people living with HSV<sup>9</sup>

Ambition to transform the prevention and treatment of infectious diseases for billions of people

1. PubMed. Global Disease Burden Estimates of Respiratory Syncytial Virus-Associated Acute Respiratory Infection in Older Adults in 2015: A Systematic Review and Meta-Analysis. Accessed June 2023. Available at: <https://pubmed.ncbi.nlm.nih.gov/30880339/>  
2. World Health Organization. WHO launches new global influenza strategy. Accessed June 2023. Available at: <https://www.who.int/news/item/11-03-2019-who-launches-new-global-influenza-strategy>  
3. World Health Organization. WHO Coronavirus (COVID-19) Dashboard. Accessed June 2023. Available at: <https://covid19.who.int/>  
4. World Health Organization. TPP for rapid test for meningitis surveillance and outbreak detection - public consultation. Accessed June 2023. Available at: <https://www.who.int/news-room/articles-detail/tpp-for-rapid-test-for-meningitis-surveillance-and-outbreak-detection---public-consultation>  
5. WHO. Accessed June 2023: <https://www.who.int/teams/health-product-policy-and-standards/standards-and-specifications/vaccine-standardization/pneumSdisease>  
6. Butler 2015, Foxman, Nippon 2016, Sanchez 2014, Harada et al. 2012, Maasaka et al. 2016, Wong 2017, Lui 2017, GSK quantitative market research 2019, Worldbank Population Data 2019, EU5 scaled on basis of Germany  
7. Centers for Disease Control and Prevention. Shingles (Herpes Zoster). Accessed June 2023. Available at: <https://www.cdc.gov/shingles/index.html>  
8. World Health Organization. Hepatitis B. Accessed June 2023. Available at: <https://www.who.int/news-room/fact-sheets/detail/hepatitis-b>  
9. James C, et al. Bulletin WHO 2020;98:315–29

# World leader in infectious diseases

## Uniting science, technology and talent to get ahead of disease together

### A long history of innovation leadership, with significant ambitions for growth

Infectious disease development

>70 years

New launches since 2000

>15

Pivotal trial data readouts 2023 to 2031

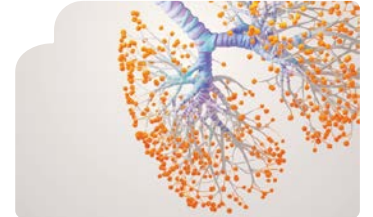
~22

New launches 2023 to 2031

~25

- Pioneer of novel research methods and technologies to help protect people from infectious diseases caused by bacteria, viruses and parasites
- Broadest portfolio in the industry and market leading in multiple categories, e.g. shingles, meningitis, and paediatrics
- 90% of the vaccines portfolio offers >90% efficacy
- Poised to lead in total adult immunisation schedule with current best-in-class shingles and RSV vaccines
- World-class manufacturing, regulatory and technical expertise creating high barriers to entry
- £1 billion investment in R&D to get ahead of infectious diseases in lower income countries
- Ambition is to transform the prevention and treatment of infectious diseases for billions of people given the significant and growing burden to patients and society

Seasonal respiratory viruses



Bacterial and fungal infections



Chronic viral infections



Delivering health impact at scale



# World-leading infectious diseases portfolio

## Addressing a significant global health burden for society

### Phase I - 22 assets

2904545 (adjuvanted recombinant protein*) <i>C. difficile</i>
4429016 (adjuvanted bioconjugated, recombinant protein*) <i>K. pneumoniae</i>
3993129 (adjuvanted recombinant subunit) cytomegalovirus <sup>1</sup>
4382276 (mRNA*) seasonal flu
4396687 (mRNA*) COVID-19
4077164 (bivalent GMMA*) invasive non-typhoidal salmonella**
3943104 (recombinant protein, adjuvanted*) therapeutic herpes simplex virus
3536867 (bivalent conjugate*) salmonella ( <i>typhoid + paratyphoid A</i> )
2556286 (Mtb cholesterol dependent inhibitor*) tuberculosis
3186899 (CRK-12 inhibitor*) visceral leishmaniasis
3494245 (proteasome inhibitor*) visceral leishmaniasis
3772701 ( <i>P. falciparum</i> whole cell inhibitor*) malaria
3882347 (FimH antagonist*) uncomplicated UTI
3923868 (PI4K beta inhibitor) viral COPD exacerbations
4182137 (anti-spike protein antibody*) COVID-19 <sup>1</sup>
3965193 (PAPD5/PAPD7 inhibitor) Hep B
5251738 (TLR8 agonist*) Hep B
cabotegravir (integrase inhibitor [400 mg/ml formulation]) HIV
3739937 (maturation inhibitor) HIV
4004280 (capsid protein inhibitor) HIV
4011499 (capsid protein inhibitor) HIV
4524184 (integrase inhibitor*) HIV

### Phase II - 14 assets

3437949 (adjuvanted recombinant protein*) malaria fractional dose
4406371 (live, attenuated) MMRV new strain
3536852 (GMMA*) Shigella
3528869 (viral vector with recombinant protein, adjuvanted*) therapeutic hepatitis B virus**
4023393 (recombinant protein, OMV, conjugated vaccine) MenABCWY, 2nd Gen <sup>1</sup>
4178116 (live, attenuated) varicella, new strain
5101956 (MAPS*) adult pneumococcal disease, 24-valent
5101955 (MAPS*) paediatric pneumococcal disease, 24-valent
4106647 (adjuvanted recombinant protein*) human papillomavirus <sup>1</sup>
4348413 (GMMA) gonorrhoea <sup>1</sup>
3036656 (leucyl t-RNA synthetase inhibitor*) tuberculosis
sanfetrinem cilexetil (GV118819) tuberculosis
BVL-GSK098 (ethionamide booster*) tuberculosis
VIR-2482 (neutralising monoclonal antibody*) influenza
3810109 (broadly neutralising antibody*) HIV

### Phase III - 8 assets

Arexvy (adjuvanted recombinant protein*) RSV older adults <sup>4</sup>
SKYCoVione (recombinant nanoparticle, adjuvanted*) COVID-19 <sup>^</sup>
gepotidacin (BTI inhibitor*) uncomplicated UTI**
bepirovirsen (antisense oligonucleotide*) hepatitis B virus**
Bexsero (recombinant protein) MenB
MenABCWY (recombinant protein, OMV, conjugated vaccine) MenABCWY, 1st Gen
tebipenem pivoxil (antibacterial carbapenem*) complicated UTI <sup>6</sup>
Brexafemme (antifungal glucan synthase inhibitor*) invasive candidiasis

- Infectious diseases
- HIV

## Recent pipeline developments

### Arexvy (RSV, older adult)

- First company to receive approval (US, EU)
- Second season RSV data
- Additional flu co-admin data, 50-59 high-risk adults phase III data and further regulatory decisions (JP) anticipated in H2 2023

### MenABCWY

- Phase III primary endpoints met; only 5-in-1 vaccine to demonstrate immunological effectiveness against 110 diverse MenB invasive strains
- Preliminary phase III data presented at European Society for Paediatric Infectious Diseases

### Gepotidacin

- Potential to be the first new antibiotic class for uUTIs in over 20 years
- Positive phase III data presented at European Society of Clinical Microbiology and Infectious Diseases



\*In-license or other alliance relationship with third party \*\* Additional indications or candidates also under investigation ^ In registration

1. In Phase I/II study 2. Transition activities underway to enable further progression by partner 3. GSK has exclusive option to co-develop post Phase II 4. Approved in US and EU 5. Collaboration with SK Bioscience, approved in Korea and UK 5. Phase III study start expected in 2023

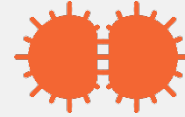
# Delivering the next wave of vaccines to address infectious disease

## First or best-in-class opportunities in Phase I or Phase II clinical development



### GSK3943104 for herpes simplex virus

- Leverages knowledge and expertise from herpes varicella zoster virus
- ~500 million people across the world are infected with herpes simplex virus or HSV
- 1/3 of patients with genital herpes suffer frequent outbreaks. Beyond the physical outbreaks, genital herpes is also associated with significant psychological morbidity, stigma, low quality of life and a three-fold increase in the risk of acquiring HIV
- Opportunity to transform genital herpes management by providing a superior, long-acting and simple treatment option



### GSK4348413 for *Neisseria gonorrhoeae*

- In clinical development to prevent *Neisseria gonorrhoeae* infections in individuals  $\geq 16$  years, regardless of previous infection history
- *Neisseria gonorrhoeae* is a common sexually transmitted infection with more than half of cases occurring among young people aged 15-24 years of age
- Untreated gonorrhoea can result in chronic pain, life-threatening ectopic pregnancy and infertility and can increase the risk of getting and transmitting HIV in both women and men. An estimated 82 million new gonococcal infections occurred worldwide in 2020<sup>1</sup>
- This asset has been granted Fast Track Designation by the US FDA underlying the pressing medical need

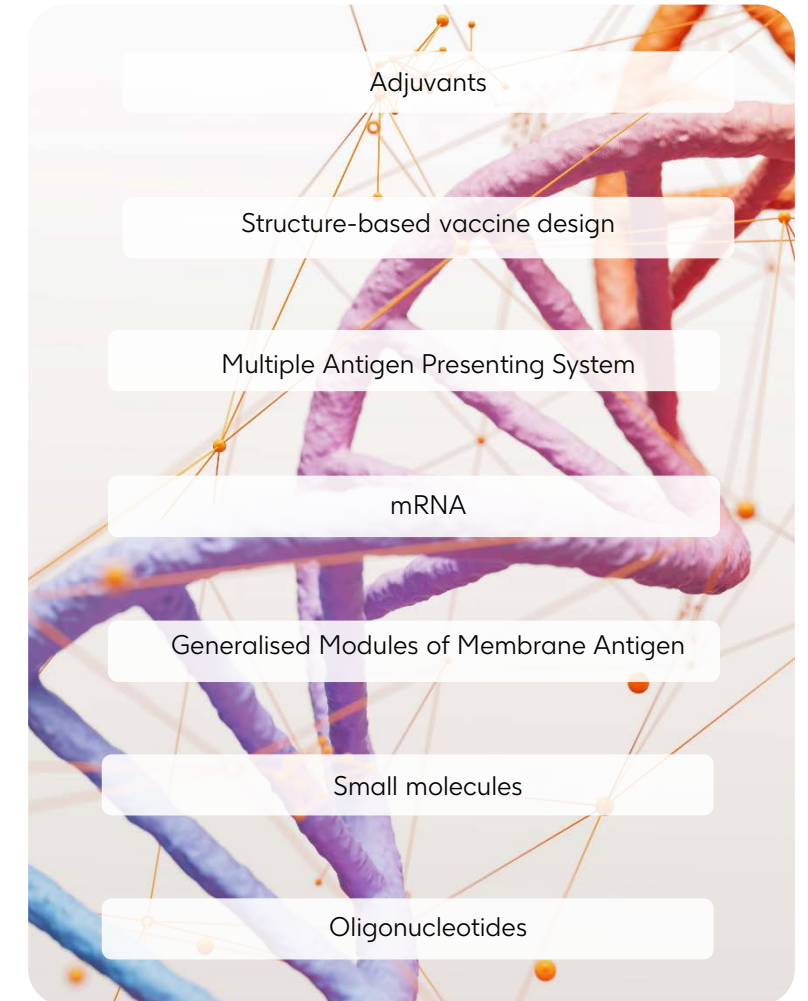
# Leading suite of platform technologies across vaccines and medicines

## Unlocking the potential to go beyond existing modalities

Breadth of platform technologies provides options for future vaccines and medicines with increasing platform synergy

### Select examples

- **Next wave adjuvant:** could deliver similar potency and decreased reactogenicity to unlock new prophylactic and therapeutic fields
- **mRNA:** potential to be applied across a number of diseases; currently evaluating second-generation mRNA backbone, developed with CureVac. Positive phase I trial featuring modified mRNA monovalent vaccine candidates targeting COVID-19 and flu
- **Multiple Antigen Presenting System (MAPS):** novel and highly efficient vaccine technology platform that combines polysaccharides and proteins, potentially enables broader coverage and generating higher antibody responses – phase II 24 valent and pre-clinical 30-plus valent pneumococcal vaccine candidate
- **Oligonucleotides:** bepirovirsen, an anti-sense oligonucleotide, is designed to recognise HBV DNA. Wave Life Sciences PRISM oligonucleotide platform includes the in-licensing of novel RNA-editing oligonucleotides
- **Protein engineering:** for multiple auto-immune diseases that are advancing through preclinical phases



# A new technology era advancing human biological science

## AI/ML is characterising disease and accelerating the discovery of novel medicines

### Discovery and preclinical

>80%

Preclinical targets have genetic evidence

- >40 joint research projects through 23andMe
- Large-scale foundational datasets to improve target validation and translation
- Computational biology to support the positioning of bi-specifics

### Clinical development

75%

Clinical development targets have genetic evidence

- Computational biology and deep phenotyping to identify predictive biomarkers for patient selection and indication expansion
- Predictive biomarkers are defining the right patient population and improving clinical success rates by up to 5x
- Real-world evidence-matching e-records and deep phenotype data for clinical trial design

### Using machine learning generating deep insights for bepirovirsen

- Machine learning models are identifying patient profiles that are indicative of clinical and biological trajectories
- Proprietary algorithms are predicting future response for bepirovirsen
- Uncovered five distinct patient subtypes in response to bepirovirsen treatment, including a subtype enriched for responders and a mixed response subtype
- Nearly doubled precision in patient response trajectory prediction versus traditional virological marker HBsAg
- **Status:** published positive B-Clear phase IIb results. Started B-Well 1 and B-Well 2 phase III trials in Q1 2023. B-Together phase IIb data readout H2 2023



# Science and technology hold the key to transforming medical discovery

## Continued pipeline productivity improvements are delivering new treatments

Success rates<sup>1</sup> in phase II have improved to median with phase III and registration upper quartile

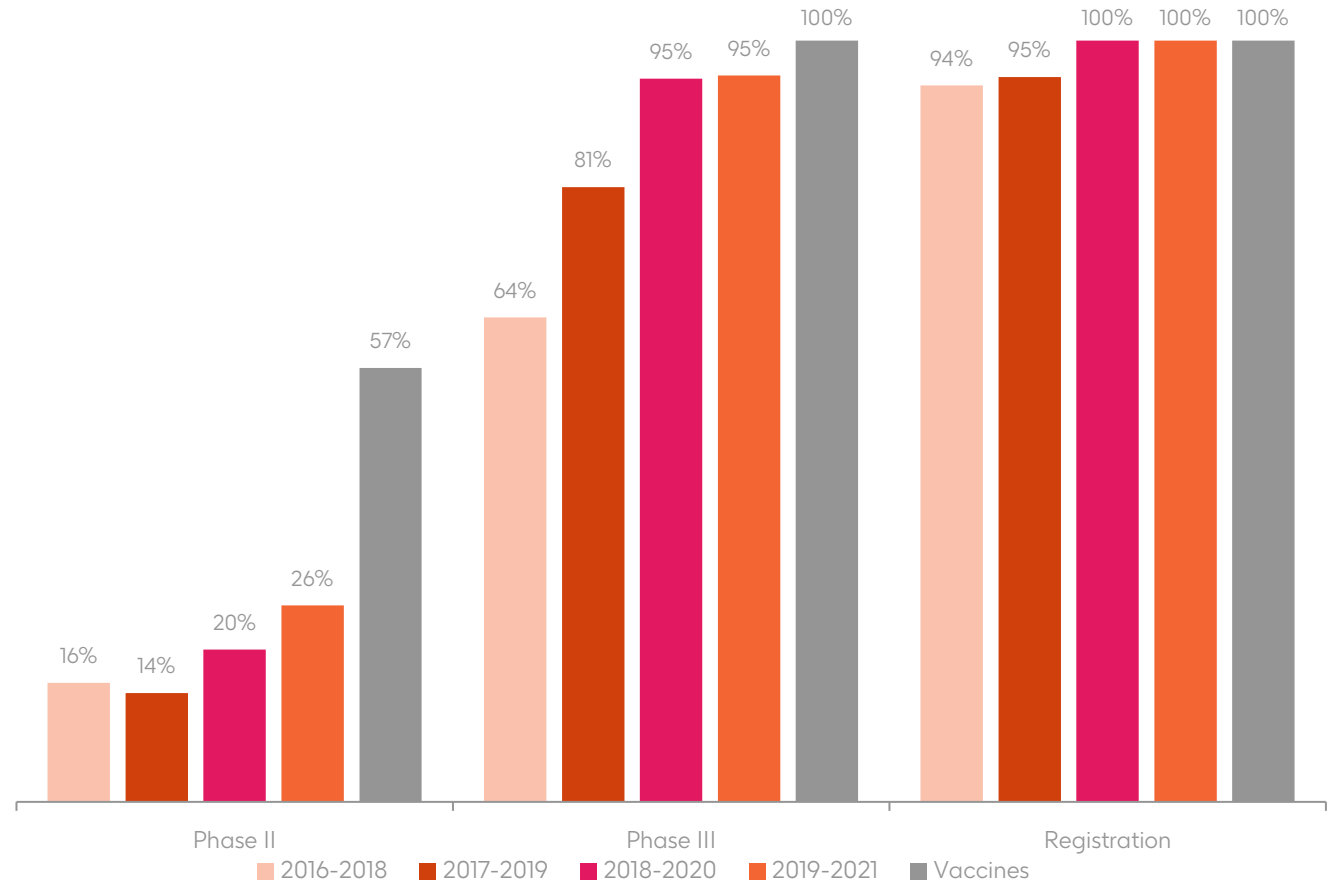
End to end cycle times have improved by 20% compared to industry median since 2016 helped by vaccines performance

End to end cycle times have decreased by

# 3.7 years

- Vaccine cycle times are faster, and success rates higher relative to the pharmaceutical industry benchmark
- Overall performance has been improving over the years on a background of increasing industry cycle times and has now surpassed the three-year rolling industry average (GSK 9.6 years versus industry 11.4 years)

R&D late-stage success rates, three-year rolling trend





# Delivering profitable growth to 2026 and beyond

Luke Miels, Chief Commercial Officer

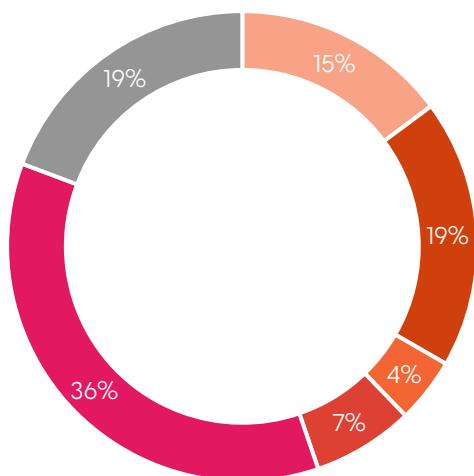
# Delivering double-digit growth

## Infectious diseases represented more than 50% of full-year 2022 sales

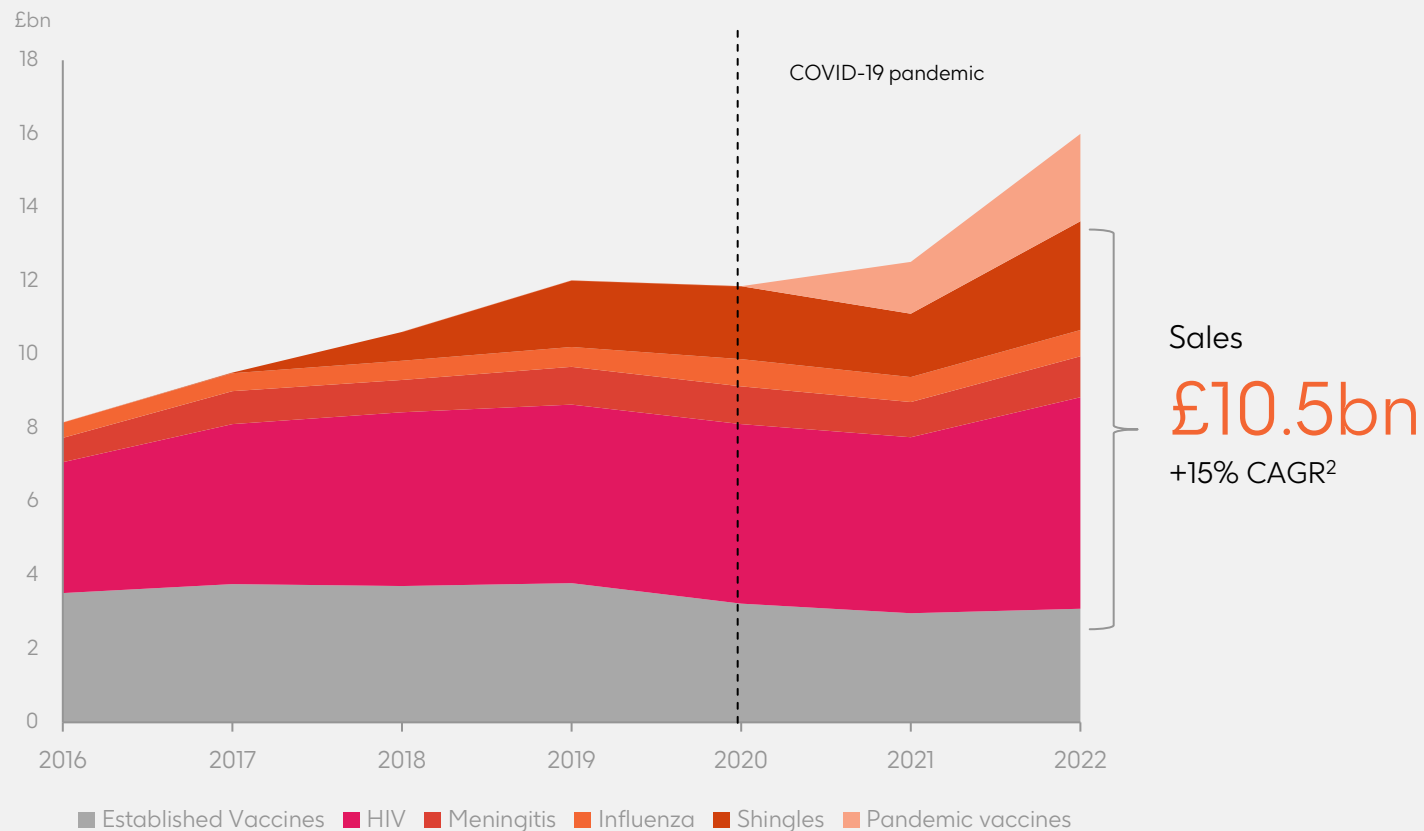
Sales from infectious diseases<sup>1</sup>

# £16bn

+12% CAGR<sup>2</sup>



### Delivering resilient revenues, high margins, and profitable growth



# Infectious disease is an attractive and growing market

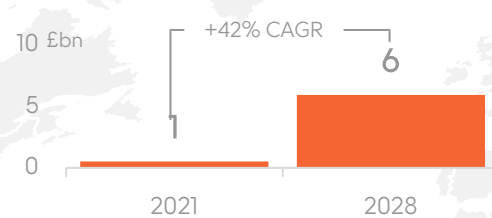
A significant and growing burden to patients and society

Market size by 2028

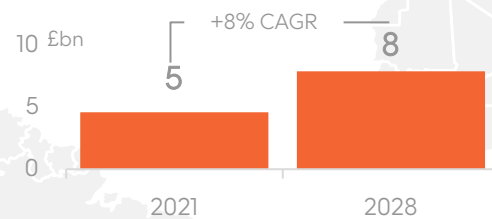
£105bn

## Seasonal respiratory viruses

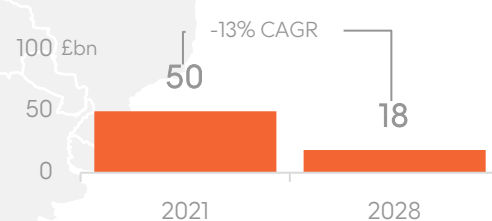
### Respiratory syncytial virus



### Influenza

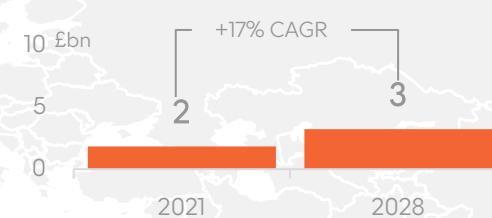


### SARS-CoV-2

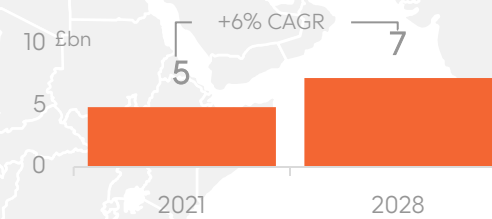


## Bacterial and fungal infections

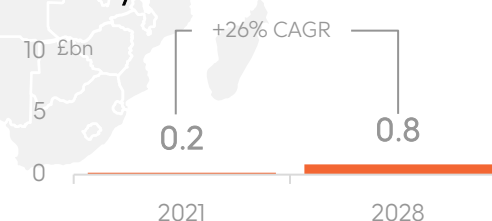
### Meningococcal disease



### Pneumococcal disease

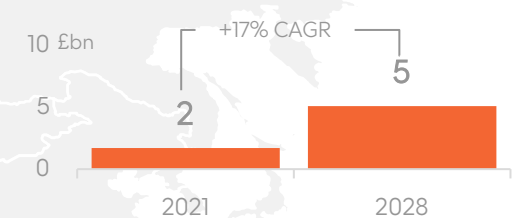


### Urinary tract infections

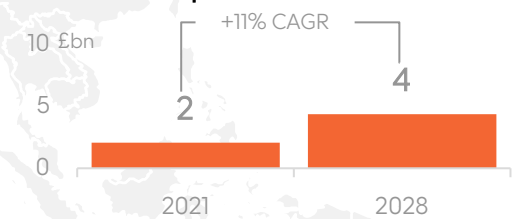


## Chronic viral infections

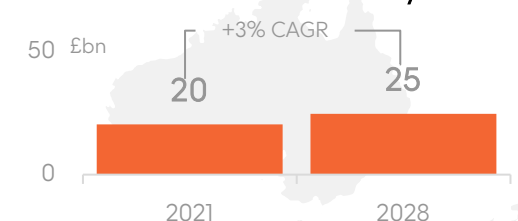
### Shingles



### Chronic hepatitis B



### Human immunodeficiency virus



# Transformed commercial capabilities

## Building blockbuster treatments in infectious diseases

### Delivering competitive launches and driving mid-cycle growth

- Improved sales force effectiveness across key markets, including China
- Deployed digital and predictive analytics to further enhance outcomes

### Shingrix

- Large population of unvaccinated individuals remains. Now launched in 31 of markets that represent ~90% of the vaccine market by value

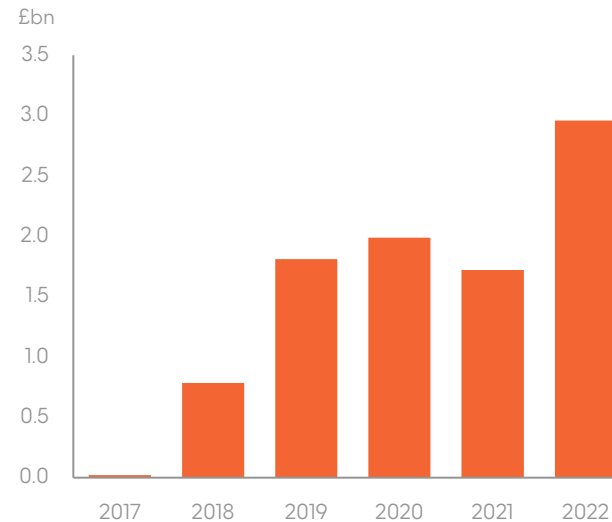
### Meningitis

- Increased focus on educating physicians and parents about the devastating impact of Men B and the strong protection they can expect from our vaccine, supported by newly available real-world evidence.

### Shingrix sales

£3.0bn

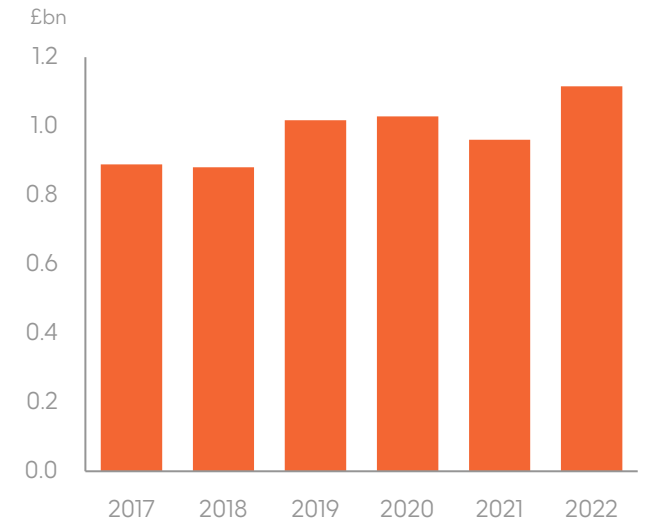
+72% AER, +60% CER



### Meningitis sales

£1.1bn

+16% AER, +11% CER



# Commitment to growth

## GSK on track to deliver profitable growth to 2026 and through the decade

### Seasonal respiratory viruses

Respiratory syncytial virus<sup>1</sup>

>£3bn

in peak year sales<sup>2</sup>

### Bacterial and fungal infections

Meningococcal disease<sup>4</sup>

£1-2bn

in peak year sales<sup>2</sup>

### Chronic viral infections

Herpes zoster (shingles)<sup>7</sup>

~£4bn

in peak year sales<sup>2</sup>

Influenza<sup>3</sup>

>£3bn

in peak year sales<sup>2</sup>

Pneumococcal disease<sup>5</sup>

>£4bn

in peak year sales<sup>2</sup>

Hepatitis B virus<sup>8</sup>

>£2bn

in peak year sales<sup>2</sup>

Anti-infectives<sup>6</sup>

~£2bn

in peak year sales<sup>2</sup>

New opportunities

### What's next...

#### Respiratory syncytial virus

- Additional flu co-admin data, 50-59 high-risk adults phase III data and further regulatory decisions (JP) in H2 2023

#### Influenza

- Phase I/II trial for multivalent vaccine candidates underway. Phase III data 2025+. Combination life-cycle management strategy

#### Meningococcal disease

- MenABCWY 2nd gen phase II data H2 2023. Pentavalent MenABCWY adolescents regulatory submission (US) in 2024. Pentavalent MenABCWY infants regulatory submission in 2025+

#### Pneumococcal disease

- 24-valent adult phase III start in 2024. Phase III data 2025+. Paediatrics launch before the end of the decade. 30-plus valent adult advanced to the clinic in 2024

#### Anti-infectives

- Preparing US and EU regulatory submissions for gepotidicin
- Start phase III trial in 2023 for tebipenem
- Relaunch *Brexafemme* for VVC and rVVC in US

#### Herpes zoster (shingles)

- Multi-billion sales through the decade; global expansion, incl. China; Life-cycle management opportunities (population expansion, booster, dementia)

#### Hepatitis B virus

- B-Together phase IIb data H2 2023
- B-WELL phase III data 2025+

# World leader in infectious diseases delivering profitable growth to 2026 and through the decade

- Broadest portfolio in the industry with market leading in multiple categories, e.g. shingles, meningitis, and paediatrics
- 90% of the vaccines portfolio offers >90% efficacy
- Poised to lead in total adult immunisation schedule with current best-in-class shingles and RSV vaccines
- Vaccinate 40% of the world's children and helped drive the adult vaccine market with ground-breaking shingles vaccine
- World-class manufacturing, regulatory and technical expertise creating high barriers to entry
- Ambition is to transform the prevention and treatment of infectious diseases for billions of people given the significant and growing burden to patients and society

## Infectious disease market growing to £105 billion by 2028

Infectious disease sales<sup>1</sup>  
full-year 2022

£16bn

Pivotal trial data  
readouts 2023+

~22

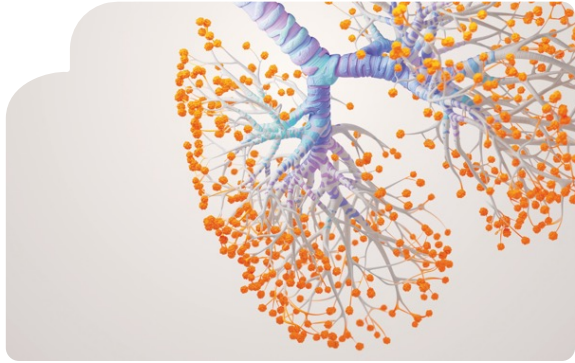
New launches  
2023+

~25

Potentially delivering resilient revenues, high margins, and profitable growth for GSK

# Getting ahead of infectious diseases with GSK management

Four Q&A-focused, virtual breakout sessions

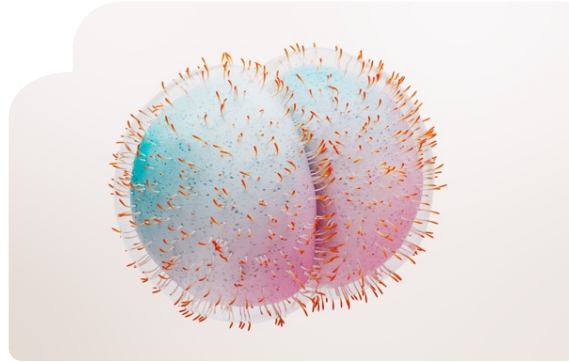


## Seasonal respiratory viruses

Session 1: 14:30-15:00 BST  
Session 2: 15:15-15:45 BST

Phil Dormitzer  
Christi Kelsey  
Luke Miels

IR: [jeffrey.r.mclaughlin@gsk.com](mailto:jeffrey.r.mclaughlin@gsk.com)

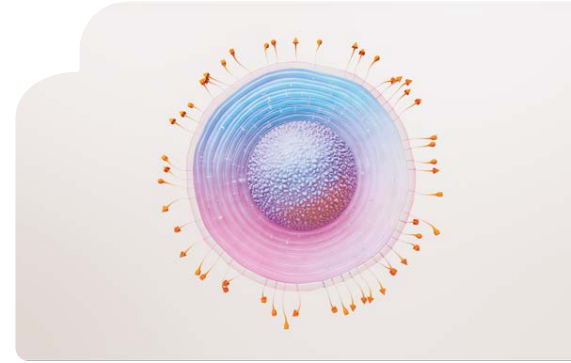


## Bacterial and fungal infections

Session 1: 14:30-15:00 BST  
Session 2: 15:15-15:45 BST

Kumaran Vadivelu  
Rob Bowers  
David Redfern

IR: [joshua.x.williams@gsk.com](mailto:joshua.x.williams@gsk.com)



## Chronic viral infections

Session 1: 14:30-15:00 BST  
Session 2: 15:15-15:45 BST

Chris Corsico  
Lizzie Champion  
James Greenhalgh  
Tony Wood

IR: [mick.j.readey@gsk.com](mailto:mick.j.readey@gsk.com)



## Delivering health impact at scale

Session 1: 14:30-15:00 BST  
Session 2: 15:15-15:45 BST

Deborah Waterhouse  
Thomas Breuer

IR: [frances.p.defranco@gsk.com](mailto:frances.p.defranco@gsk.com)



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