New product launches* underway across respiratory, HIV, oncology and vaccines

<table>
<thead>
<tr>
<th>Market definition</th>
<th>Respiratory Controller: ICS/LABA</th>
<th>Respiratory Controller: Bronchodilator</th>
<th>Metastatic Melanoma V600</th>
<th>HIV total</th>
<th>Seasonal Flu Vaccines</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current global market size</td>
<td>£8.5 bn</td>
<td>£4.8 bn</td>
<td>£0.4 bn</td>
<td>£12.3 bn</td>
<td>£2.0 bn</td>
</tr>
<tr>
<td>Current US market share</td>
<td>Advair: ~60%</td>
<td>TRx: ~0.6%</td>
<td>~72% combined TRx share of V600</td>
<td>16.5% of naive/add/switch for 3rd agent/STR</td>
<td>~65% of 3y+ QIV injection market in 2013/2014 season</td>
</tr>
<tr>
<td>Access % US pts Tier 2/3 unrest.</td>
<td>~50% Commercial</td>
<td>~75% Commercial</td>
<td>~93% Favourable Access</td>
<td>~99%</td>
<td>~98% Commercial</td>
</tr>
<tr>
<td>US Physician coverage</td>
<td>99% aware</td>
<td>86% aware</td>
<td>~44%</td>
<td>&gt;95%</td>
<td>Nearly 100%</td>
</tr>
<tr>
<td>Key US market share data</td>
<td>NBRx: ~4.5% All HCP</td>
<td>NBRx: ~3.7% All HCP</td>
<td>~72% combined NRx share of V600</td>
<td>Naive: 11%</td>
<td>Switch: 22%</td>
</tr>
<tr>
<td>Key Markets with price/reimbursement</td>
<td>Launching in EU &amp; Japan</td>
<td>Launching in EU &amp; Japan</td>
<td>Approved in EU</td>
<td>Launching in EU &amp; Japan</td>
<td>Launching in some EU and EM markets</td>
</tr>
</tbody>
</table>

*Tanzeum/Eperzan and Incruse launches expected in 2H 2014
Sources: IMS Health Data MAT Sept 2013; IMS Health Weekly Rx trends; Symphony Health Solutions; IPSOS HIV Scope; GSK estimates and CDC data.
# Pipeline Progress Since Q1 Results

## Approvals

- **Incruse** for COPD (US)
- **Anoro** for COPD (Europe)
- **Arzerra** for first line treatment of CLL (EU)
- **Anoro** for COPD (Japan)
- **Mekinist** for metastatic melanoma (EU)

## Key pipeline news updates

- darapladib SOLID study did not meet primary endpoint
- **Arzerra** ORCHARRD study in DLCBL did not meet primary endpoint
- Data from studies comparing **Incruse**+**Advair** to **Advair** alone in COPD presented at ATS
- **Tykerb/Tyverb** ALTTO study did not meet primary endpoint
- Start of phase III programme for losmapimod in ACS
- Positive data from two studies comparing **Incruse**+**Relvar/Breo** to **Relvar/Breo** alone
- Collaboration with Janssen over development of FDC once daily pill of dolutegravir+rilpivirine
- Positive data from phase III PETIT-2 study of **Promacta** in paediatric patients with cITP
- Presented three year data from **Eperzan/Tanzeum** HARMONY studies at ADA
- Start of phase III SUPPORT study for **Promacta/Revolade** in myelodysplastic syndrome
- **Arzerra** study in bulky fludarabine-refractory CLL did not meet primary endpoint
- Start of Phase III IMPACT study of FF+UMEC+VI triple combination in COPD
- COMBI-v head-to-head study of trametinib+dabrafenib vs **Zelboraf** stopped early by the IDMC as it met pre-specified efficacy criteria

## Filings & Related Updates

- Filed **Incruse** for COPD (Japan)
- CHMP positive opinion for **Triumeq** (dolutegravir+abacavir+lamivudine)
- Filed **Breo** for asthma (US)