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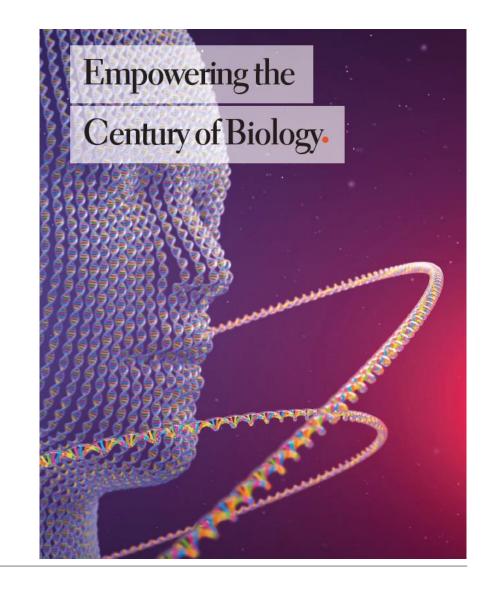
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Introducing Tecan

- Pioneer and global leader in laboratory automation, in 2020 we celebrated our 40th anniversary
- Our solutions accelerate, automate and enhance the processes in state-of-the-art diagnostics and life sciences labs
- Adding reagents and consumables to complete automation solutions:
 - Immunoassays for specialty diagnostics
 - Functional consumables for MassSpec sample preparation
 - Reagents and consumables for Genomics NGS library preparation
- Innovative digital offering for laboratory management and services
- HQ in Switzerland, 3 manufacturing and R&D sites in Europe and 4 in the US, 1 manufacturing site in Asia; software competence center in Germany
- ~2,000 employees; global sales and service network
- Listed at the SIX Swiss Exchange (TECN; TECN SW)





Tecan's Products, Business Structure and Markets

LIFE SCIENCES BUSINESS

- Focused on all end-user activities
- Products marketed under the Tecan brand through own sales & service organizations and distributors
- Instruments, reagents, consumables, customer service, spare parts



PARTNERING BUSINESS

- Focused on all OEM activities
- Products sold by partners under their own brand, partner combines instruments with own reagents/tests
- Dedicated systems, platform-based instruments, components, consumables, spare parts, service



57% OF GROUP SALES

43% OF GROUP SALES

CHF 637M IN REVENUE (2019)



LIFE SCIENCE RESEARCH

DIAGNOSTICS

APPLIED MARKETS

Fiscal year 2019



Transition from Research to Diagnostics

TECAN HAS A UNIQUE POSITION TO BRIDGE FROM RESEARCH TO DIAGNOSTICS SETTINGS

LIFE SCIENCE RESEARCH



LAB DEVELOPED TESTS (LDT)



IN-VITRO DIAGNOSTICS

Life Sciences
Business

Partnering Business

Covering individual steps of a specific workflow



Empowered with Tecan.

EXAMPLES

- Next-Generation Sequencing (NGS)
- Mass Spectrometry
- Liquid Biopsies / Circulating Tumor Cells (Oncology / NIPT / Infectious Diseases)
- Tissue Pathology (IHC, ISH, NGS, MS)
- Ultra-Sensitive Biomarker Detection and many more...

Sample-to-Result Solution





Tecan at the Forefront of the Fight Against COVID-19

CONTRIBUTIONS TO THE GLOBAL EFFORTS TO CONTAIN THE PANDEMIC NOT A COINCIDENCE

FROM VACCINE DEVELOPMENT TO CLINICAL TESTING



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- Corporate strategy and core competencies provided the basis for fast and flexible response
 - Application focus on genomics (PCR to NGS)
 - Infectious disease testing is a well-established healthcare use
 - Scaling up of workflows in regulated environments is at the heart of our business
 - Available digital tools to help manage multiple systems
 - Broad local presence to support our customers
- Leveraging unique position with solutions from reasearch to clinical diagnostics
- Supporting virus research, sequencing for variants, vaccine development, viral RNA purification, PCRbased and serology testing ...and more



Tecan at the Forefront of the Fight Against COVID-19

WE ARE PASSIONATE ABOUT SUPPORTING AND EMPOWERING LABS AND DIAGNOSTIC COMPANIES

LIFE SCIENCES BUSINESS



Supporting and equipping individual labs and lab chains to further scale up COVID-19 testing

PARTNERING BUSINESS



Supplying in vitro diagnostic companies with instruments, components and/or disposable pipette tips



Agreement with Thermo Fisher Scientific

LEVERAGING TECAN'S AUTOMATION TECHNOLOGY TO ENABLE SCALED-UP COVID-19 TESTING GLOBALLY

- Thermo Fisher Scientific is introducing a new highly automated, real-time PCR solution
- The Thermo Fisher Scientific Amplitude Solution is a molecular diagnostic testing system designed to analyze up to 6,000 samples in a single day
- It leverages Thermo Fishers's Applied Biosystems
 QuantStudio 7 PCR instruments
- It includes instruments of the Tecan Fluent Laboratory
 Workstation family and the Introspect software
- Perfect example for interplay between Tecan's Life Sciences and Partnering Business to the benefit of the customer

THERMO FISHER SCIENTIFIC AMPLITUDE SOLUTION





Tecan Competencies Empowering the Century of Biology

FROM DISCOVERY OF NOVEL MEDICATIONS ALL THE WAY TO BETTER DIAGNOSIS OF DISEASES

HEALTHCARE USE



APPLICATIONS

- Genomics
- Protein analysis
- Cell & tissue analysis

DETECTION & ASSAY TECHNOLOGIES

- Sequencing
- PCR
- Mass Spectrometry
- Immunoassays
- Imaging
- Advanced Staining

TECAN'S ENABLING COMPETENCIES

- Applications and Workflows
- Robotics and Automation
- Software and Informatics
- Detection and Imaging
- Precision Handling of Liquids
- Reagents and Consumables

All built on a robust foundation of:

- Product Development and Systems Integration Expertise
- Quality Management System
- Regulatory Expertise
- Efficient Operations

AND MANY MORE



Tecan is Benefitting from Multiple Megatrends

5 key trends...



Population growth and the aging population



High levels of investment in healthcare and life science research in emerging markets



Development of targeted pharmaceuticals and use of companion diagnostics



Explosion of biological knowledge is leveraged into applied markets



Population sequencing programs and genetic testing directly for consumers

...fuel need for lab automation



Increasing test volumes



Increasing needs

- Productivity
- Reproducibility and standardization
- Precision
- Robustness of processes
- Regulatory compliance



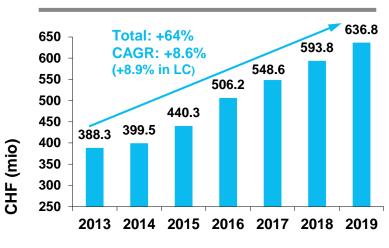
Increasing Laboratory Automation



Megatrends Translating into Growth Opportunities

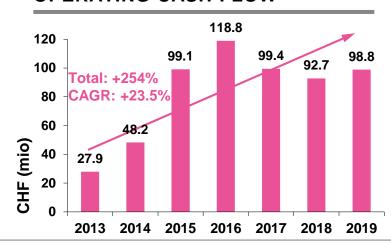
SUCCESSFUL FINANCIAL PERFORMANCE IN RECENT YEARS

SALES DEVELOPMENT

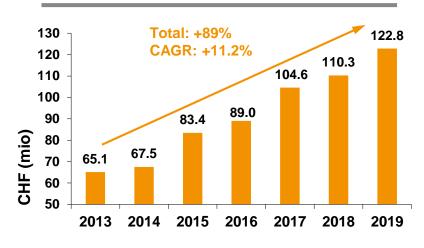


All figures are as reported, non-adjusted for e.g. acquisition-related costs

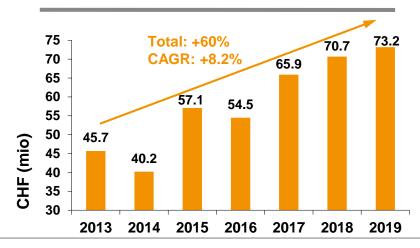
OPERATING CASH FLOW



OPERATING PROFIT (EBITDA)



NET PROFIT

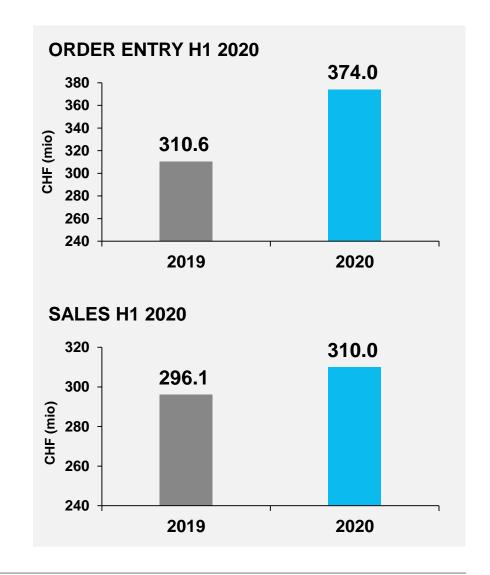




Financial Highlights

STRONG FINANCIAL PERFORMANCE IN H1

- Surge in orders, with order entry up by 24.3% in LC and 20.4% in CHF
- Order backlog at record high
- Strong sales growth of +8.0% in LC and +4.7% in CHF; pronounced headwinds and tailwinds from the coronavirus pandemic
- Both business segments contributing to growth; product lines supporting the global fight against COVID-19 with substantial increase in demand
- Total recurring revenues at 47% of sales (+13.9% in LC)
- Reported EBITDA margin at 19.4% of sales
- Reported net profit up by 42%
- Strong operating cash flow of CHF 83 million; 27% of sales
- Forecast for the full year of 2020 once again raised on December 1st, 2020 based on continued extraordinary demand for COVID-19 related products:
 - Sales growth in the low to mid-teens percentage range in LC
 - Reported EBITDA margin above 20.5% of sales



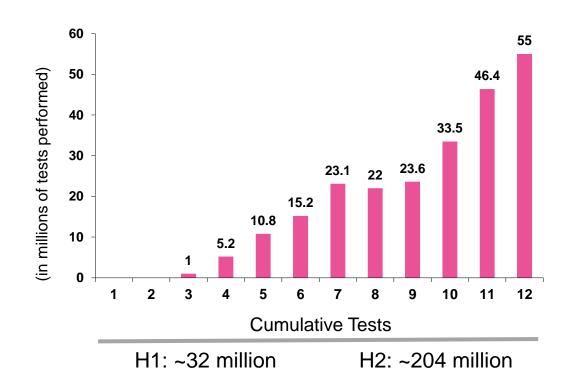
LC = local currencies



2021 Still Impacted by COVID-19

HOW LONG AND HOW MUCH THOUGH?

PCR-BASED COVID-19 TESTING IN THE US (2020)



Source: The COVID Tracking Project, UBS Estimate

FACTORS IMPACTING 2021 PERFORMANCE

- Duration and magnitude of elevated levels of PCR-based testing for acute COVID-19 infections
 - Impact on continued build out of test infrastructure in different regions
 - Impact on usage of consumables
- Shift from acute testing to broad community testing to reopen schools and businesses
- Role of serology testing and T cell assays to determine immunity status
- Role of low-plex / multiplex testing for flu and SARS CoV-2
- Rebound and recovery of research activities and routine diagnostic testing



Tecan is Well-Positioned for 2021 and Beyond

STRATEGIC ORIENTATION AND PRIORITIES

FOCUS ON CORE APPLICATIONS

- Focus especially on genomics, protein analysis, cell & tissue analysis
- Increasingly offering complete solutions with selected reagents and consumables

FOCUS ON THE EMPLOYEES

- Focus on global talent and leadership development
- Diversity and inclusion is the core of the Tecan culture

FOCUS ON THE CUSTOMERS

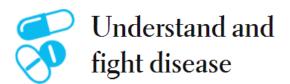
- Tecan's customer promise is "Always There For You"
- Comprehensive customer satisfaction program as key component

FOCUS ON EFFICIENCY AND SCALABILITY

- Focus on standardized processes and continuous improvement
- Defined processes, methods and tools: The Tecan Way!

FOCUS ON SUSTAINABLE DEVELOPMENT

- Sustainability deeply embedded in Tecan's corporate culture
- Contributing directly to the SDGs defined by the United Nations



Accelerate discovery of disease mechanisms and development of novel treatments



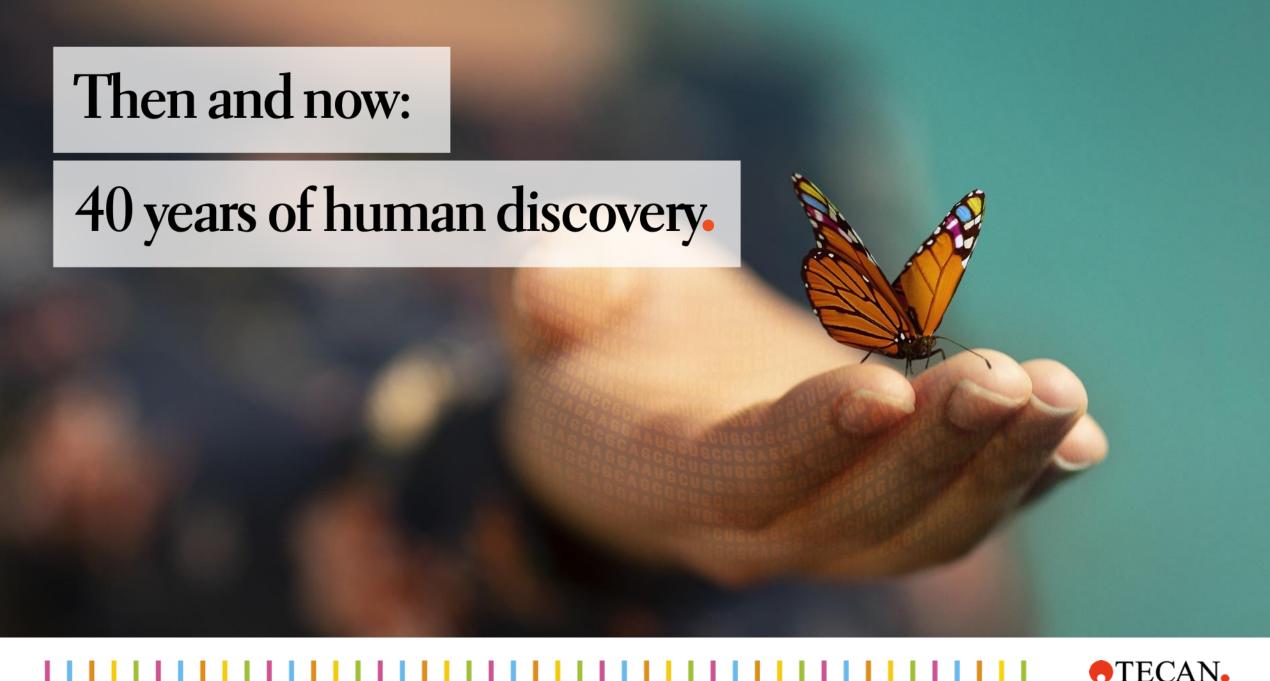
Drive translation of research insights into compliant clinical solutions at scale



Broaden access

Provide labs globally with efficient and effective diagnostic solutions







Contact and Events



NEXT EVENTS 2021

March 16: Full Year Results

April 13: Annual Shareholder Meeting

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Tecan - Who we are

Tecan (www.tecan.com) is a leading global provider of laboratory instruments and solutions in biopharmaceuticals, forensics and clinical diagnostics. The company specializes in the development, production and distribution of automated workflow solutions for laboratories in the life sciences sector. Its clients include pharmaceutical and biotechnology companies, university research departments, forensic and diagnostic laboratories. As an original equipment manufacturer (OEM), Tecan is also a leader in developing and manufacturing OEM instruments and components that are then distributed by partner companies. Founded in Switzerland in 1980, the company has manufacturing, research and development sites in both Europe and North America and maintains a sales and service network in 52 countries.

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