SECTRA

2025 Capital Markets Day

In focus: Medical IT

Agenda

Pre session

12:30 Introduction to Sectra

Part 1

13:00 Welcome and
Sectra today

13:40 Imaging IT Solutions
– overall strategy and position

14:00 Imaging IT Solutions
– product positioning and
competitive landscape

14:15 Q&A session

14:30 Introduction to product demos

Pause

14:35 Mingle and product demos

Part 2

15:10 Sectra One and the transition to services

15:25 US markets and opportunities

15:45 Customer interview

16:00 Q&A session

16:15 The way forward and final remarks

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Introduction to Sectra

– our history, culture, strategy, and vision

Torbjörn Kronander
CEO and President Sectra AB

History

- » Founded by a professor and 3 of his PhD students 1978 to solve encryption for ATMs
- » 1983 decision to make it a ”real company”
  - » Mainly consultancy but with a vision to become a product company one day
- » 1990 started medical, Teleradiology
- » 1993 First PACS in Mjölby, Sweden
- » 1994 PACS in Visby, 1995 Örebro, Tönsberg…
- » 1997 Philips partnership, First US project (Riverside, Ca)

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History Continued

- 2000 Started Microdose Mammography (Photon counting detector)
- Met EPIC first time
- 2005 Philips acquires a competitor
- 2011 Sold Mammography; Medical side concentrated on Software systems
- 2012 Won Best in KLAS US Large hospitals first time
- 2025 Fastest growing PACS vendor in the world

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Philosophy: Shareholders

Start with a rational strategy in a growing market

Then, if you:

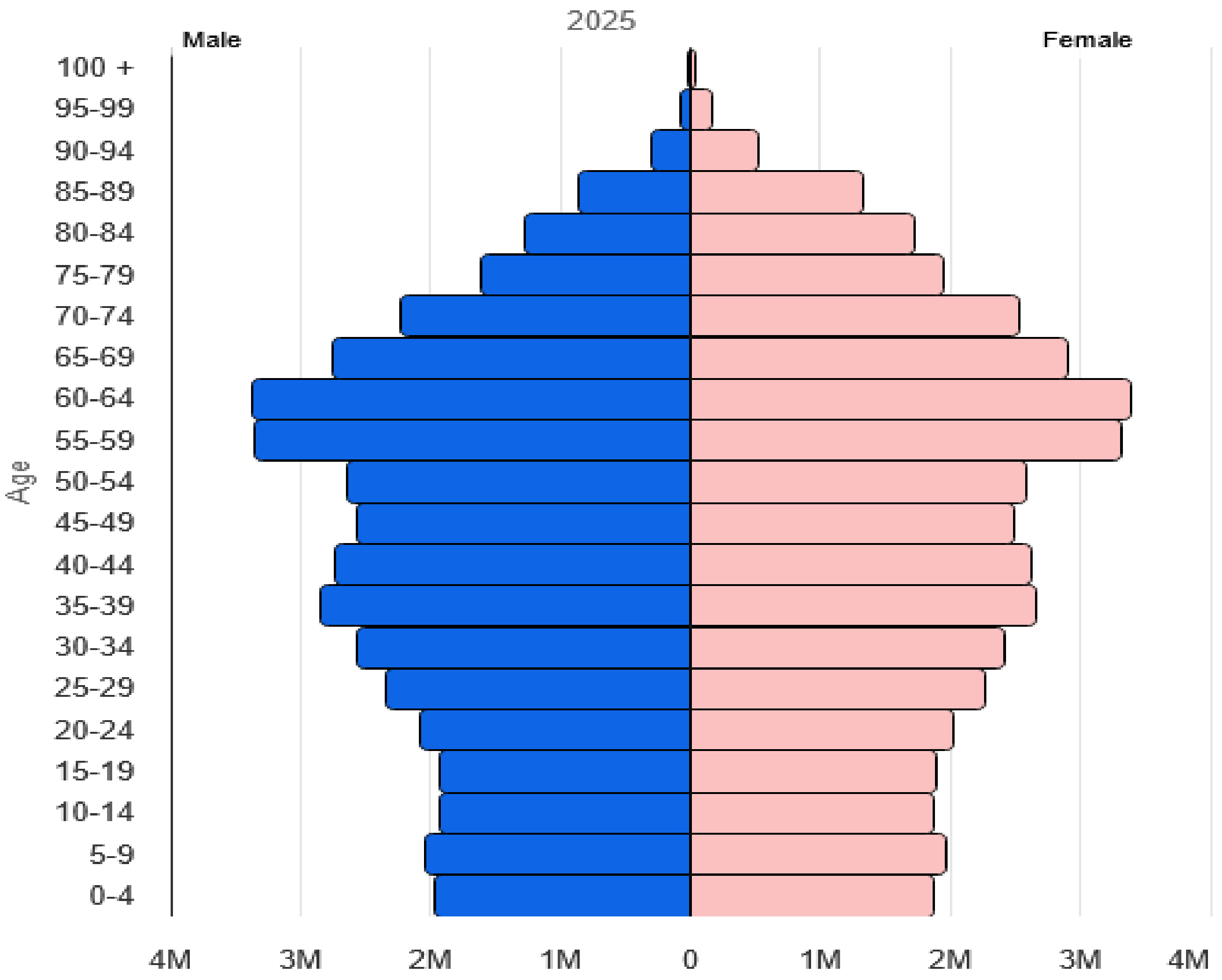
- have happy customers
- have happy employees
- dare to be expensive when you are worth it
- have perseverance and reasonable cost control

Shareholders WILL be happy

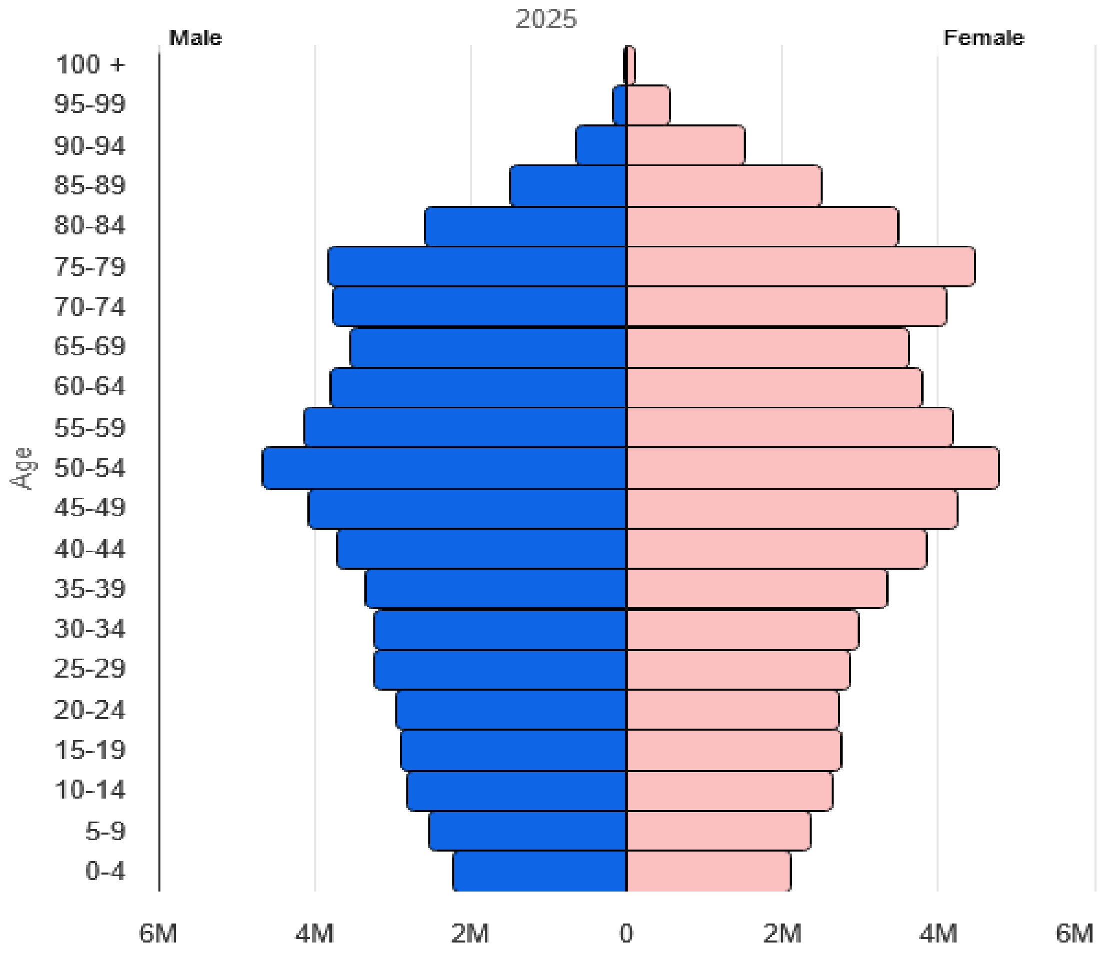
But it comes in that order!

The medical IT market

Population pyramid of Germany 2025



Population pyramid of Japan 2025



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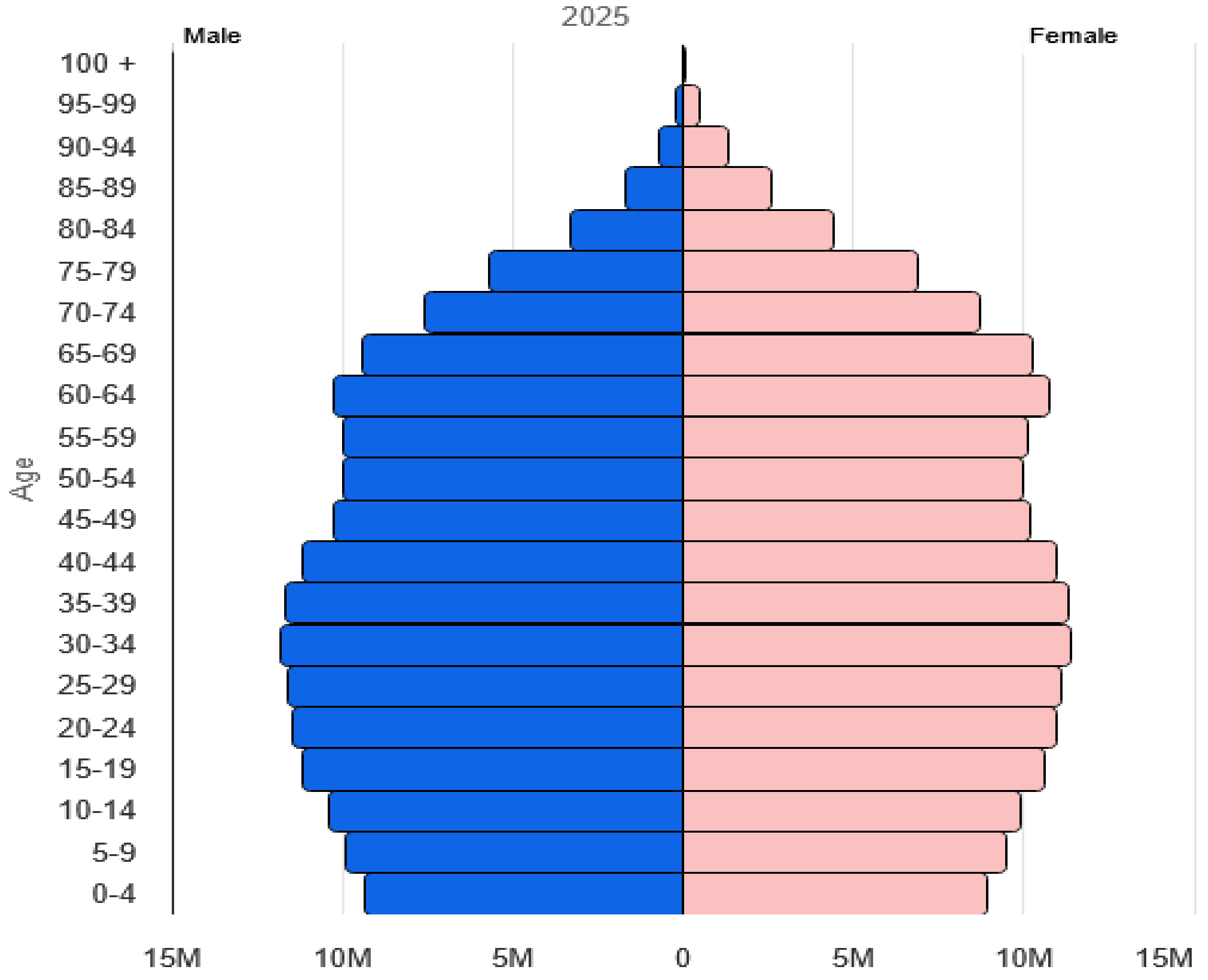
Population pyramid of USA 2025



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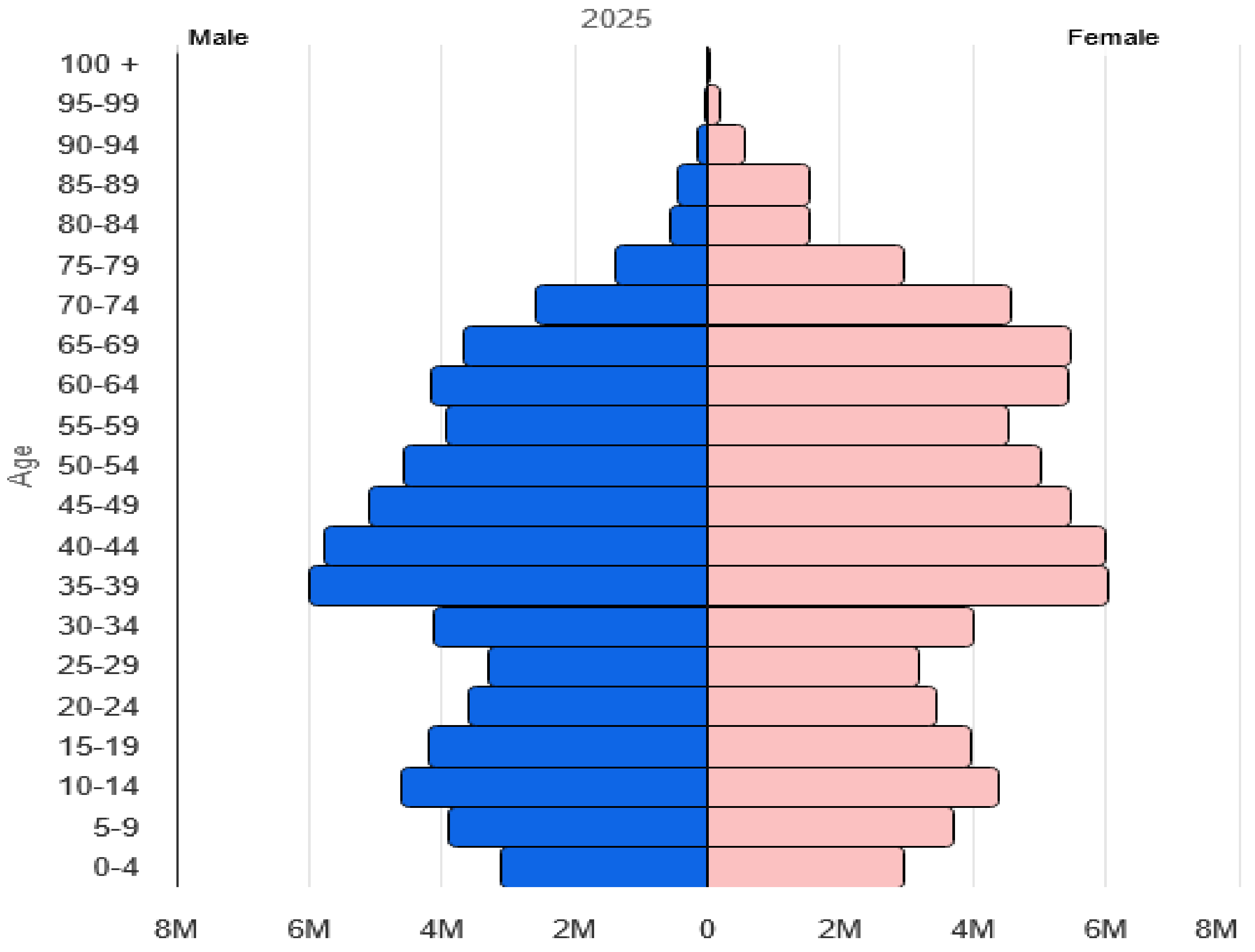
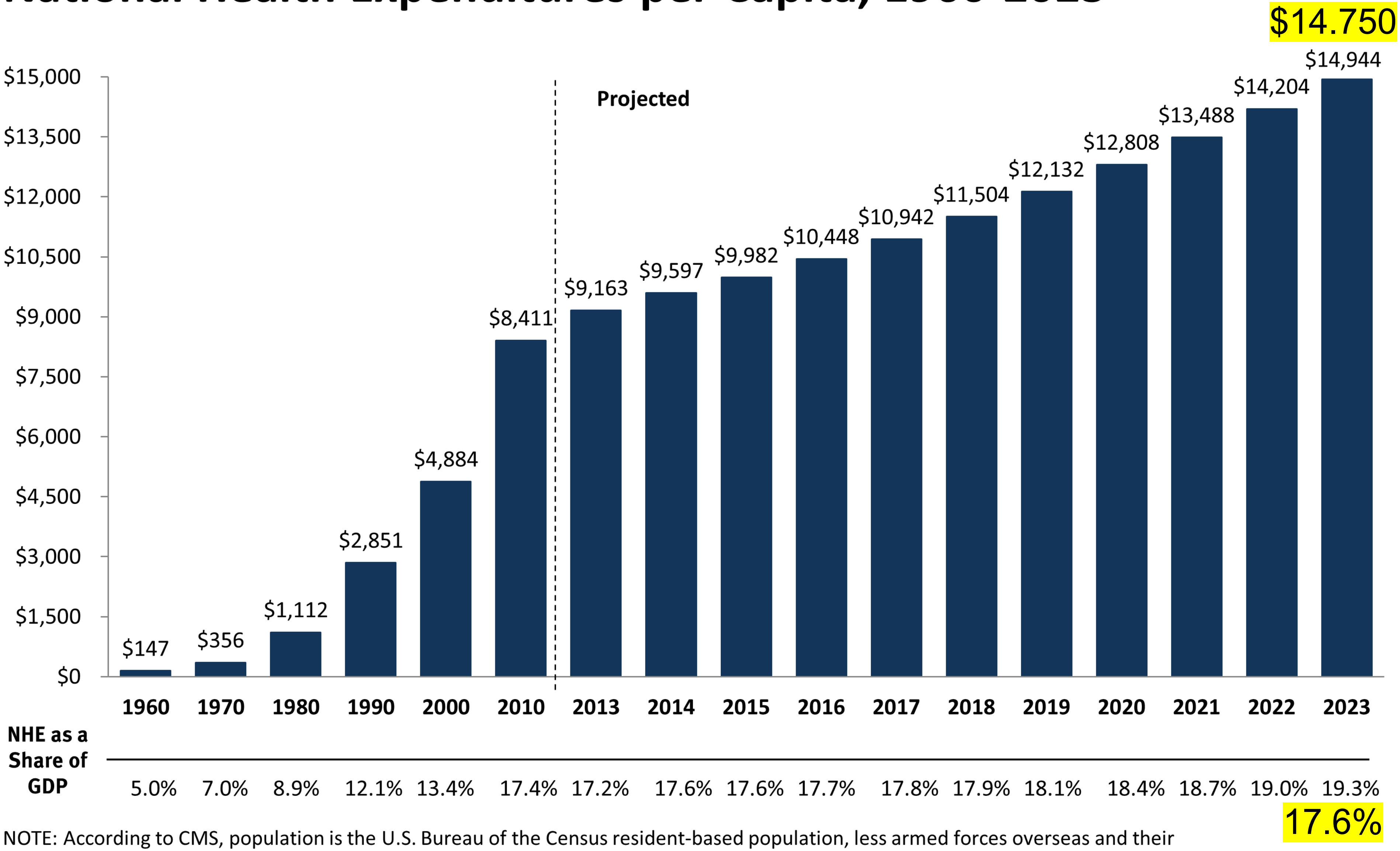
Not our market, but interesting side information

Population pyramid of Russia 2025



Add that we live longer…

National Health Expenditures per Capita, 1960-2023

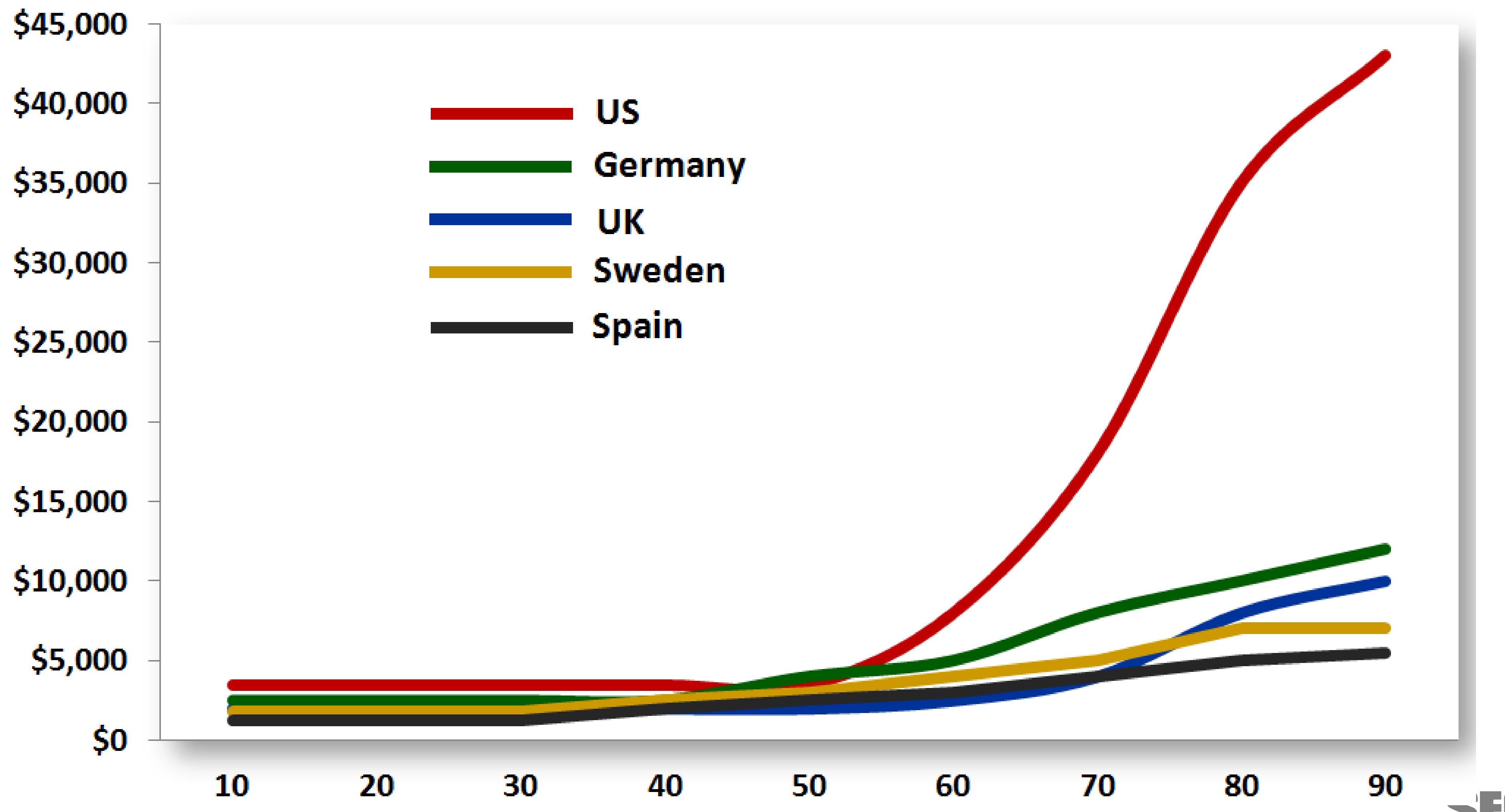


NOTE: According to CMS, population is the U.S. Bureau of the Census resident-based population, less armed forces overseas and their dependents.

SOURCE: Kaiser Family Foundation calculations using NHE data from Centers for Medicare and Medicaid Services, Office of the Actuary, National Health Statistics Group, at http://www.cms.hhs.gov/NationalHealthExpendData/ (For 1960-2010 data, see Historical; National Health Expenditures by type of service and source of funds, CY 1960-2012; file nhe2012.zip. For 2013-2023 data, see Projected; NHE Historical and projections, 1965-2023, file nhe65-23.zip).

THE HENRY J. KAISER FAMILY FOUNDATION

Annual Per Capita Healthcare Costs by Age



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Medical systems

Growth areas

Age related diseases:

Medical Diagnostics

- Neurological
- Cardiovascular
- Cancer
- Skeletal
- Vision (and Hearing)

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Leading to

Our mission statement in medical:

To increase effectiveness of healthcare, while maintaining or increasing quality in patient care

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Sectra is well positioned

Healthcare IT (and Cybersecurity) are growing markets that are forced to grow by external factors

Next check box:
Happy customers

Best in KLAS

Success is built on customer satisfaction

BEST IN KLAS® PACS: LARGE (>300K STUDIES) 2025

BEST IN KLAS® PACS: SMALL (≤300K STUDIES) 2025

BEST IN KLAS® PACS: CANADA 2025

BEST IN KLAS® PACS: NORTHERN EUROPE 2025

BEST IN KLAS® PACS: SOUTHERN EUROPE 2025

BEST IN KLAS® PACS: DACH 2025

BEST IN KLAS® PACS: MIDDLE EAST/AFRICA 2025

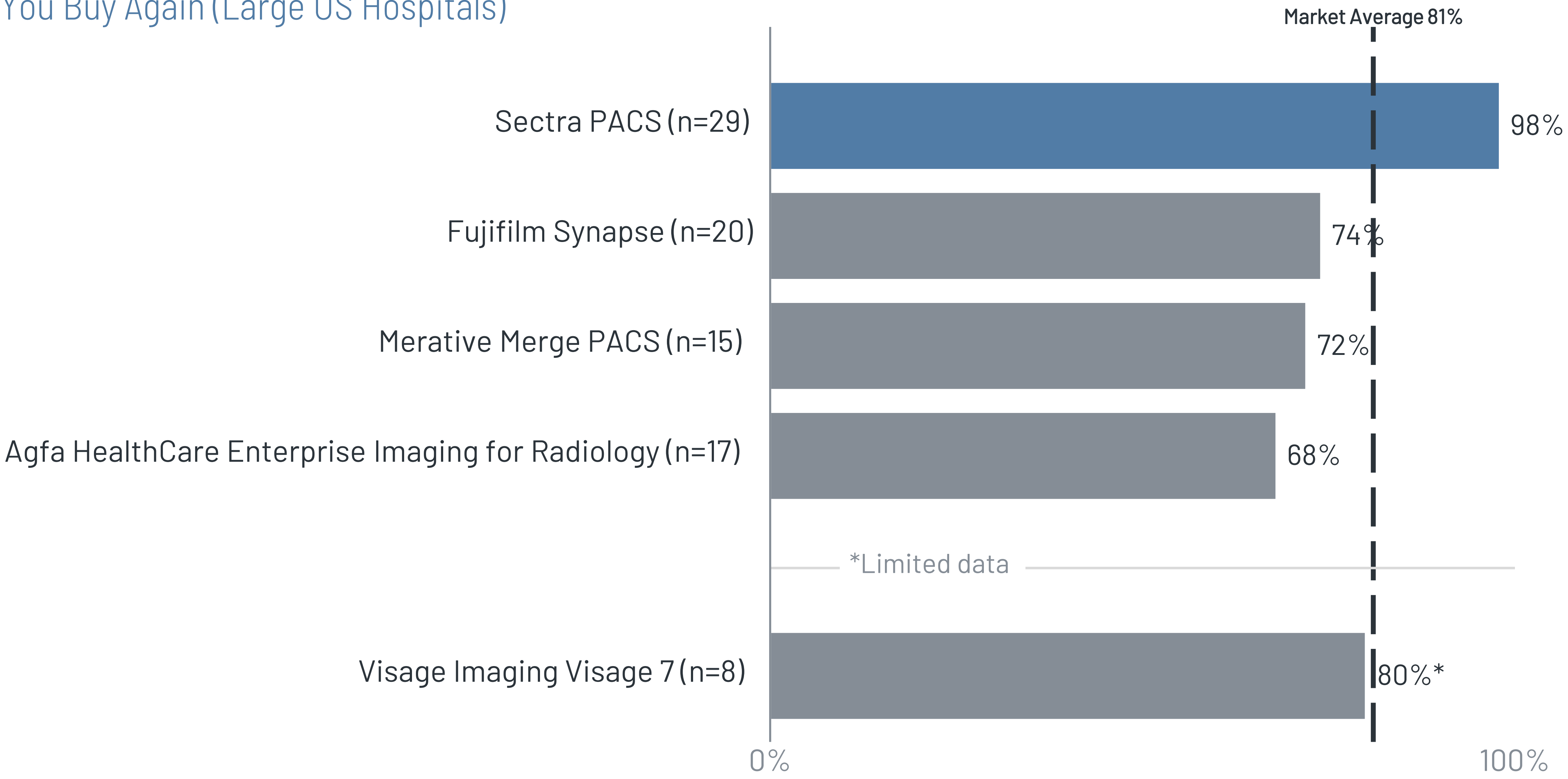
BEST IN KLAS® DIGITAL PATHOLOGY: EUROPE 2025

KLAS Executive Deep Dive

January 2024: Cris Ludwig, Eder Lagemann, Jonathan Christensen, Monique Rasband, Sidney Tate

Question Score Breakout (2024)

Would You Buy Again (Large US Hospitals)



KLAS RESEARCH

Checkbox 3
Happy customers is only possible with happy and motivated employees

Philosophy – Staff

It begins with:

Hire for Attitude and Ability,

Train for skill!

And continues with:

"Culture eats Strategy for breakfast!"

"Some famous guru"

And a good company culture is quite simple

Just live and act:

Philosophy: Shareholders

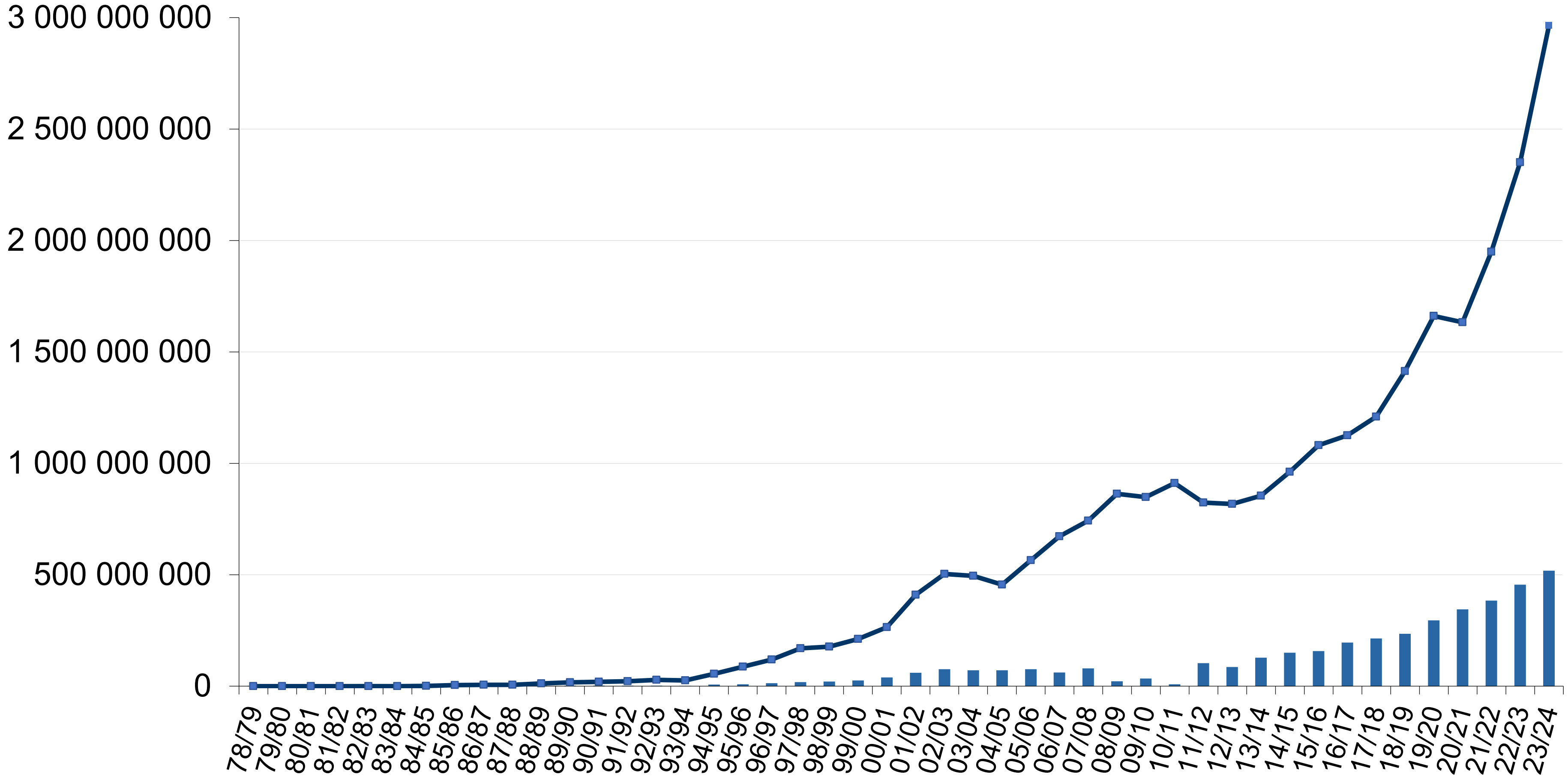
Start with a rational strategy in a growing market

Then, if you:

- have happy customers
- have happy employees
- dare to be expensive when you are worth it
- have perseverance and reasonable cost control

Shareholders WILL be happy

Financial trend 1978-2024



Revenue MSEK

2,964

FY 24/25

EBIT MSEK

518

FY 24/25

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Knowledge and passion

Short pause

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Sectra speakers

Torbjörn Kronander

Marie E Trägårdh

Fredrik Häll

Fredrik Gustafsson

Isaac Zaworski

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Other Sectra representatives

Operations

Lisa Lindfors, Global product manager Radiology Imaging

Björn Limber, Global product manager Cardiology IT

Fredrik Lysholm, General Manager Genomics IT

Johan Carlegrim, General Manager Medical Education

Gustaf Schwang, General Manager Orthopeadics IT

Finance and IR

Jessica Holmquist, CFO

Helena Pettersson, IRO

Emil Lindfors Blomberg, Adm. Assistant

- Safety instructions
- Photos
- Q&A
- Other practical details

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Sectra today

– where we are, where we are going, and why

Torbjörn Kronander
CEO and President Sectra AB

Who I am

- Founder of Sectra's medical operations and it's Manager/President 1990–2012
- CEO and President since 2012
- Joined Sectra 1985
- Swedish navy for 3.5 years, Commander of a minesweeper
- MSEE, PhD, MBA, Dr. Medicine h.c.
- Sailor of most things that float, pilot of most things that fly
- Largest shareholder with 9% of capital and 17% votes

As for market data of the ImIT business, Marie will cover that in her presentation

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Q3; Financial targets for the Group fulfilled

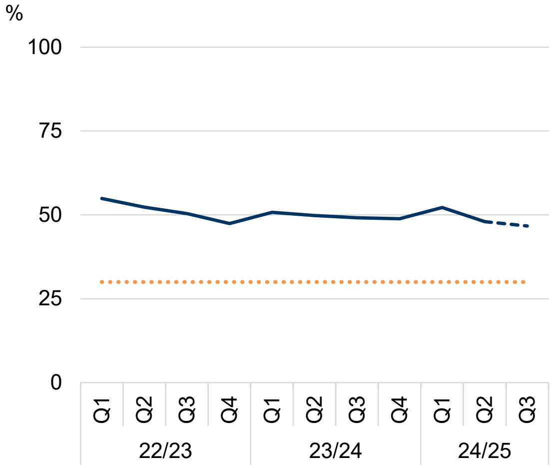
includes Sectra Communications

1. Stability

47%

Equity/Assets ratio at end of period, %

Target >=30%

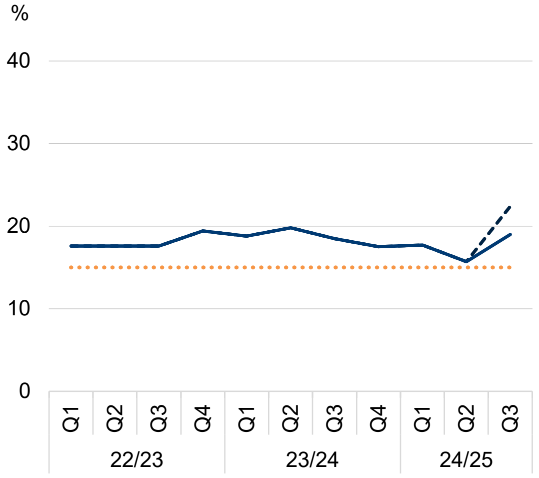


2. Profitability

19%

Operating margin, R12, %

Target >=15%

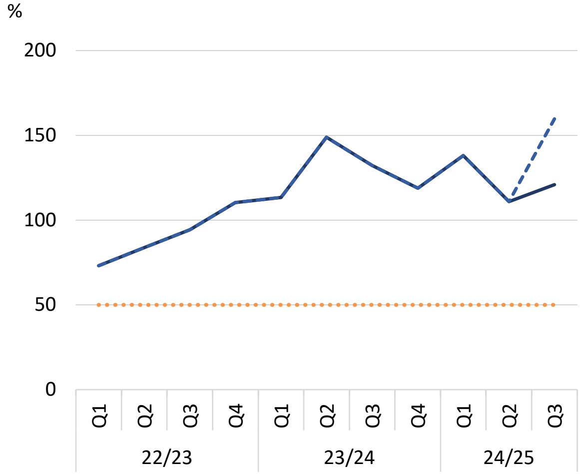


3. Growth of profits

121%

EBIT/share growth over a 5-year period, %

Target >=50%



Excluding patent settlement
Including patent settlement
Goal

Priority

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Main business lines

Imaging IT solutions

IT-security solutions

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Growth opportunities outside of main business

Business Innovation

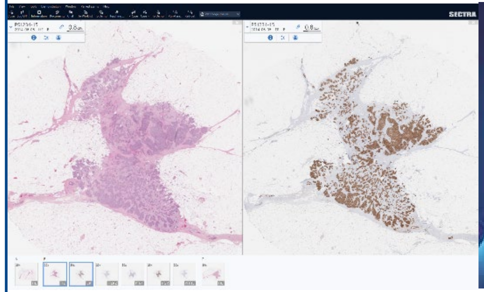
Medical Education

Orthopaedics

Genomics IT

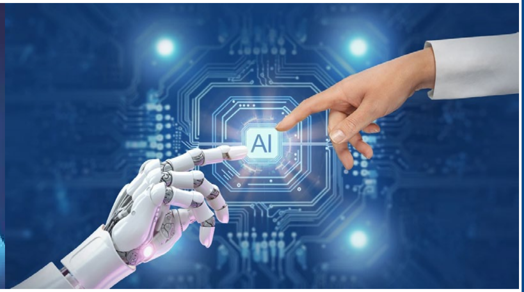
Research

Imaging IT



Pathology and Integrated Diagnostics

Cardiology



AI platform

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Strong performance in all operating areas

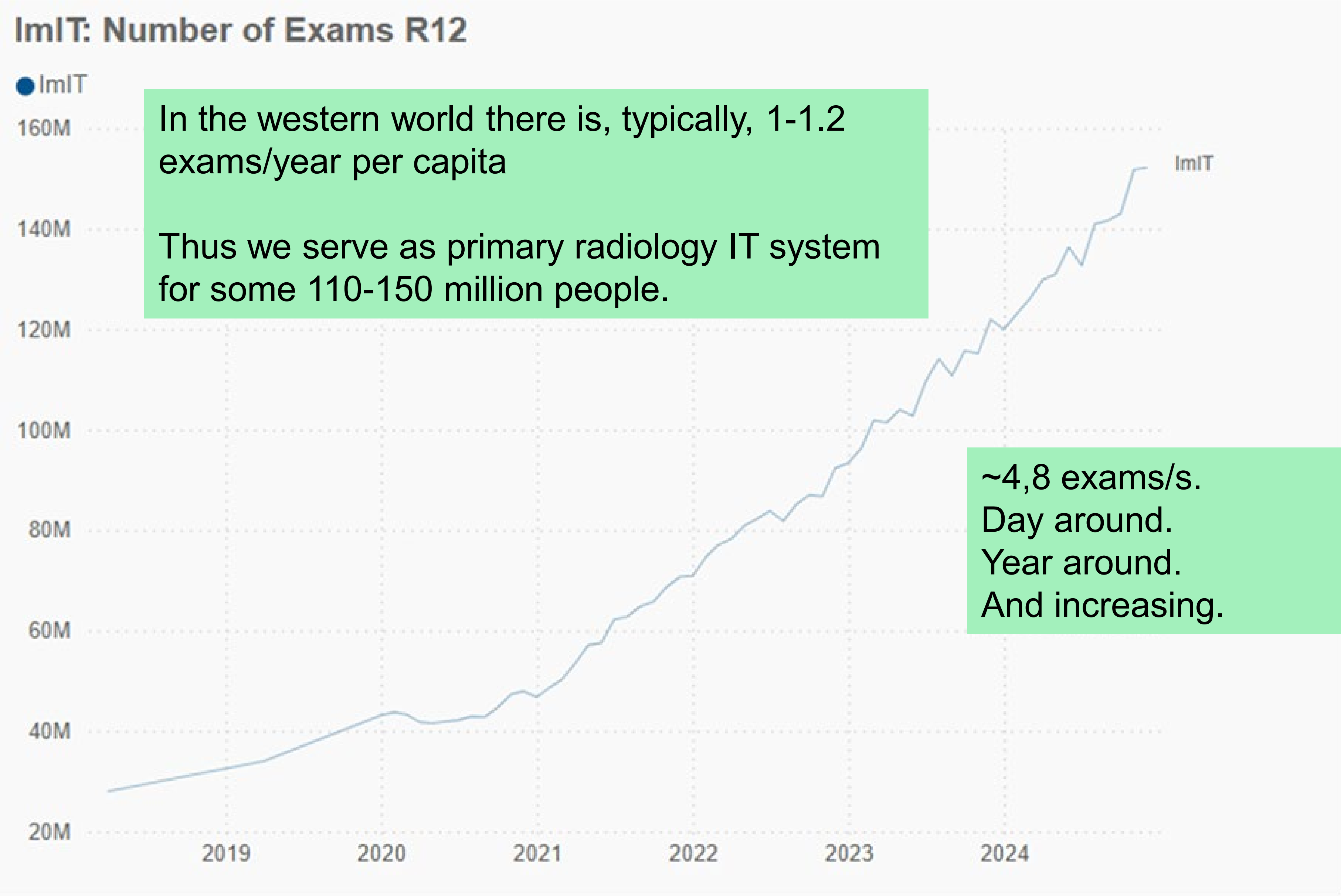
Rapid progress in transition to “as a Service” model

Expansive growth phase with large investments

High customer satisfaction

The main business is still PACS for Radiology

ImIT: Number of exams R12 in Sectra PACS



In the western world there is, typically, 1-1.2 exams/year per capita

Thus we serve as primary radiology IT system for some 110-150 million people.

~4,8 exams/s.
Day around.
Year around.
And increasing.

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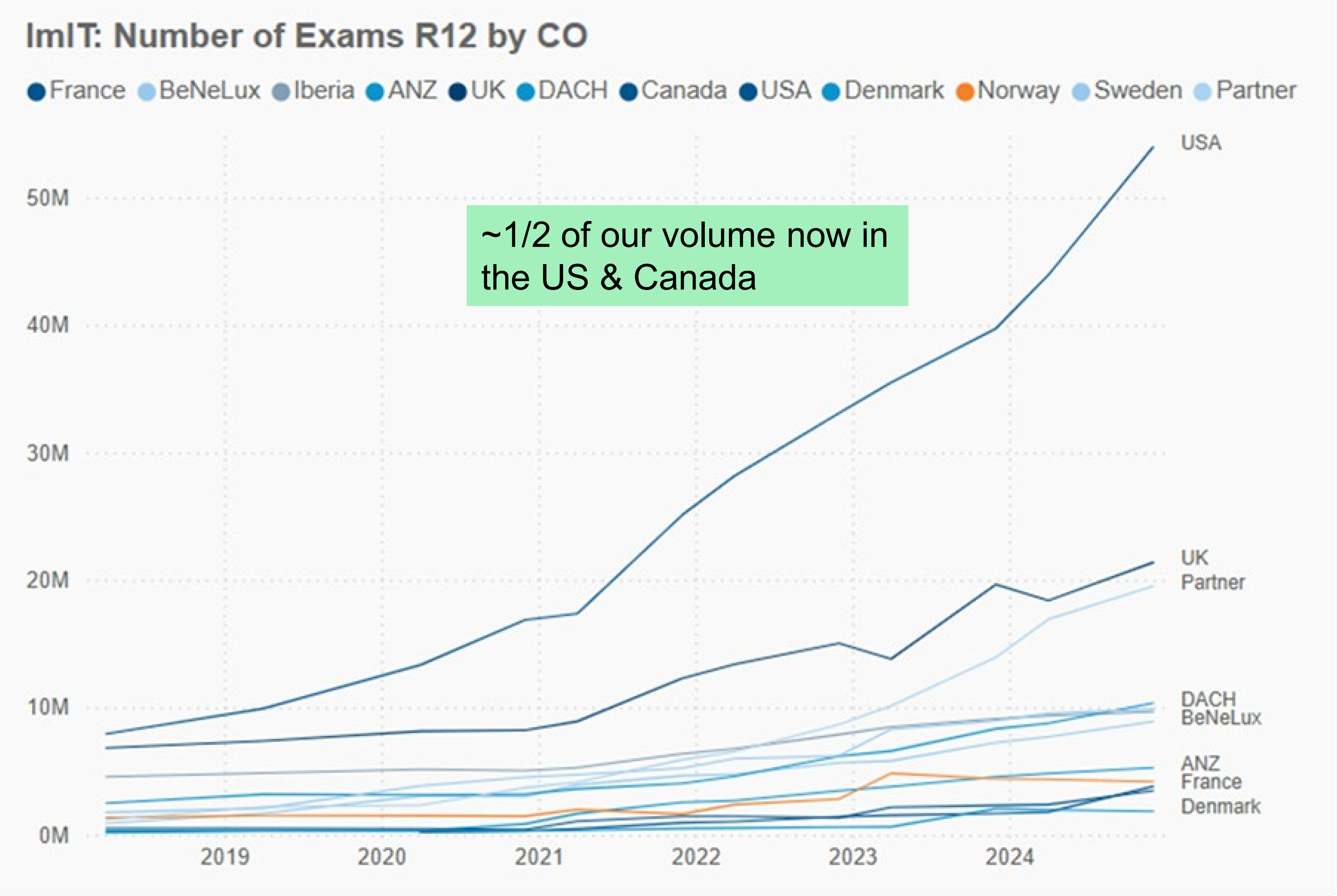
ImIT: Number of exams in Sectra PACS, R12 per CO



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Growth comes from three factors

- » Adding new customers
- » Not loosing old customers (churn 0.6%)
- » Growth in cvolumes of existing customers

Examples of growth opportunities outside of the main business

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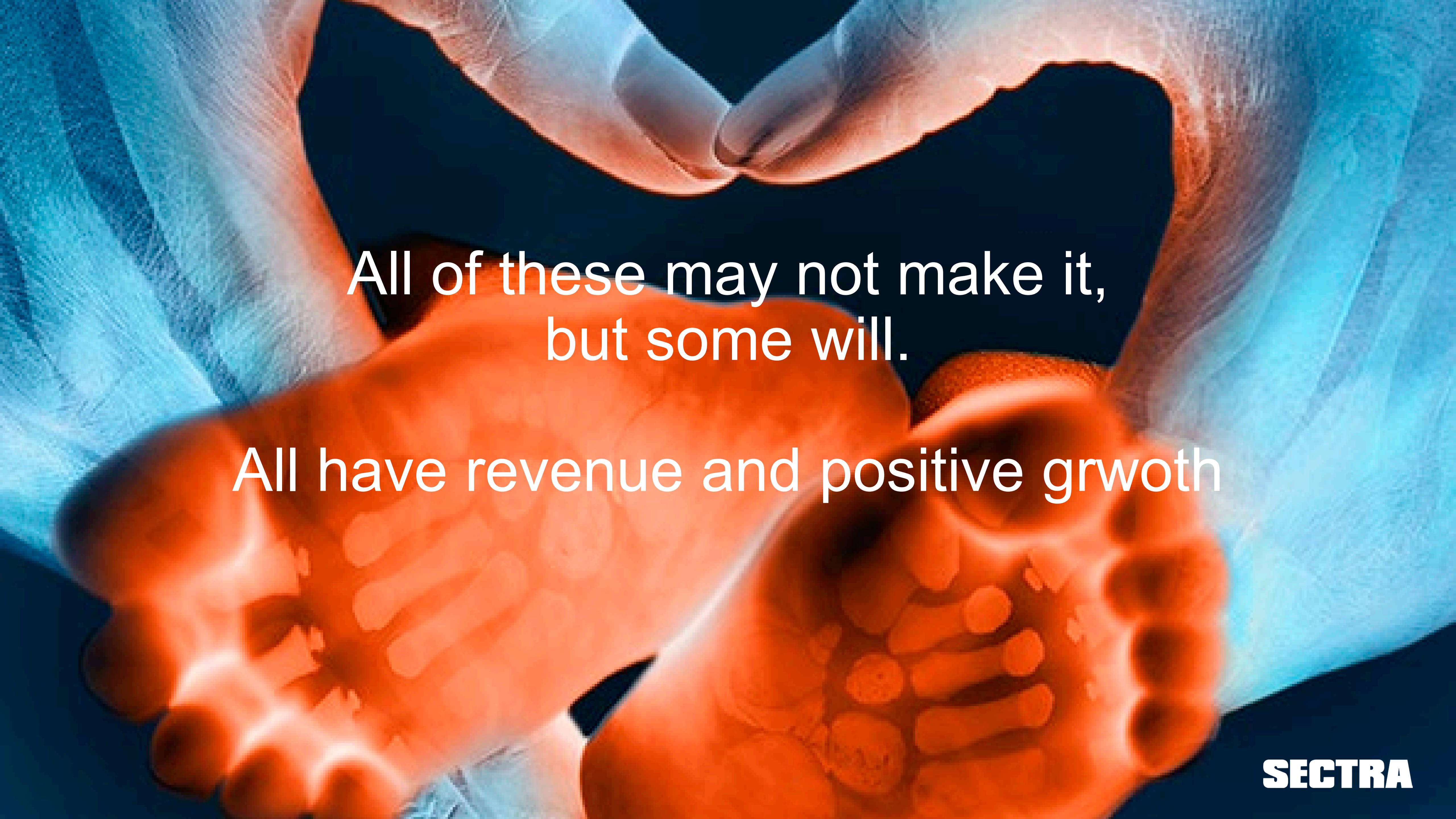

All of these may not make it,
but some will.

All have revenue and positive grwoth

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Medical education

Medical knowledge

1950 the doubling time of medical knowledge was estimated to be about 50 years

1980 it was estimated to be 7 years

2010 3.5 years

2025 73 days

Source: Prof Sam Gambhir, ex Chief of diagnostics, Stanford and National Library of Medicine

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Applications
images gathered in lessons
Neuroradiology diagnostics...
This lesson is created for radiology residen
autonomously practice neuroradiology re
It includes the patient background, case
Histology Gastrointes
llection of histology slide
anatomy of the gastroin
s suitable for interactio
Medical Images
Browse through the library of medical
View all medical images
CT
US
Radiology imaging
Amplifier Services
Breast imaging
Share & collaborate
Digital pathology
Sectra Enterprise Imaging
DoseTrack
Cardiology imaging
Enterprise archive
Orthopedic planning
Enterprise capture
Ophthalmology imaging
Sectra Education Portal
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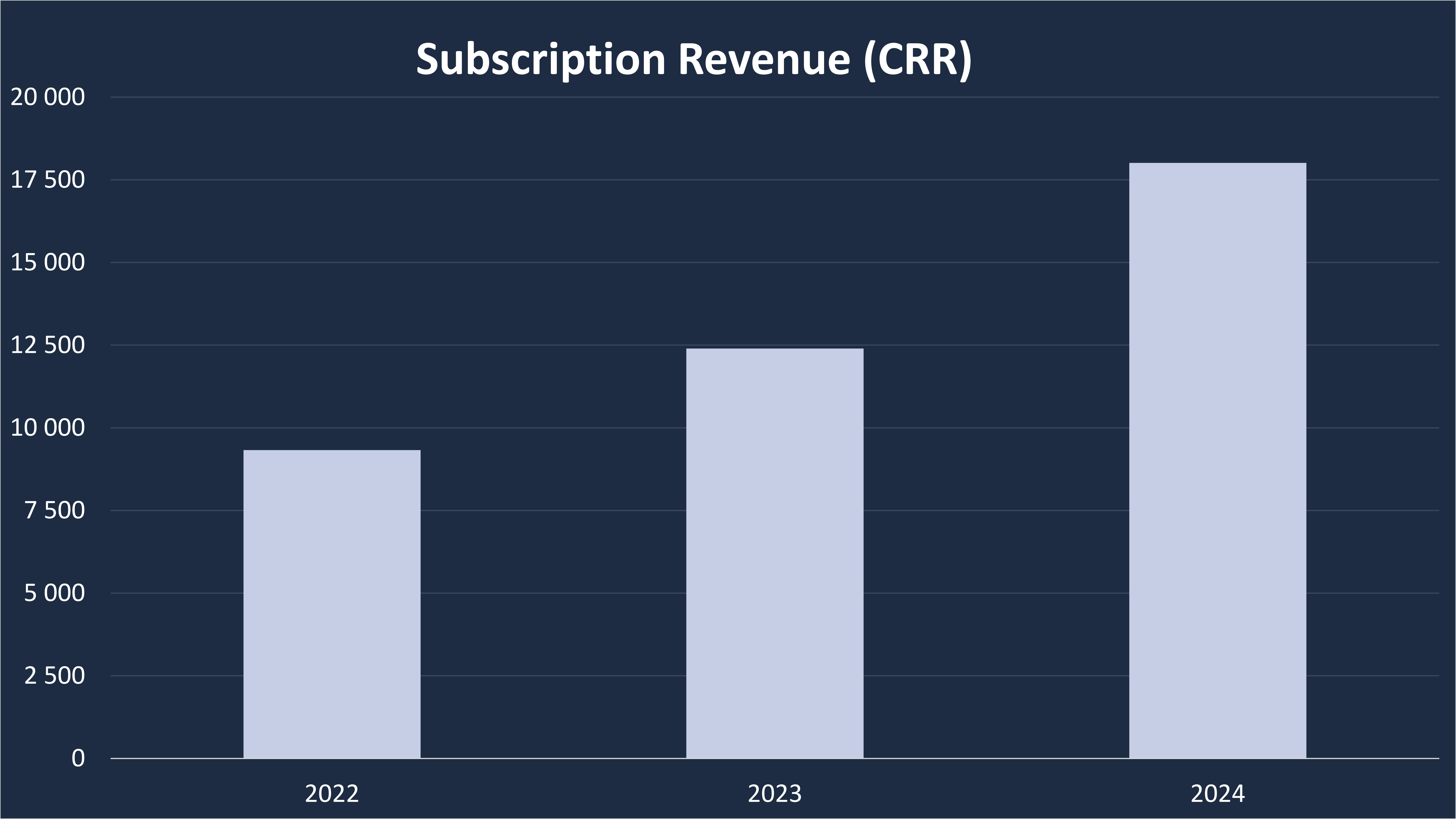
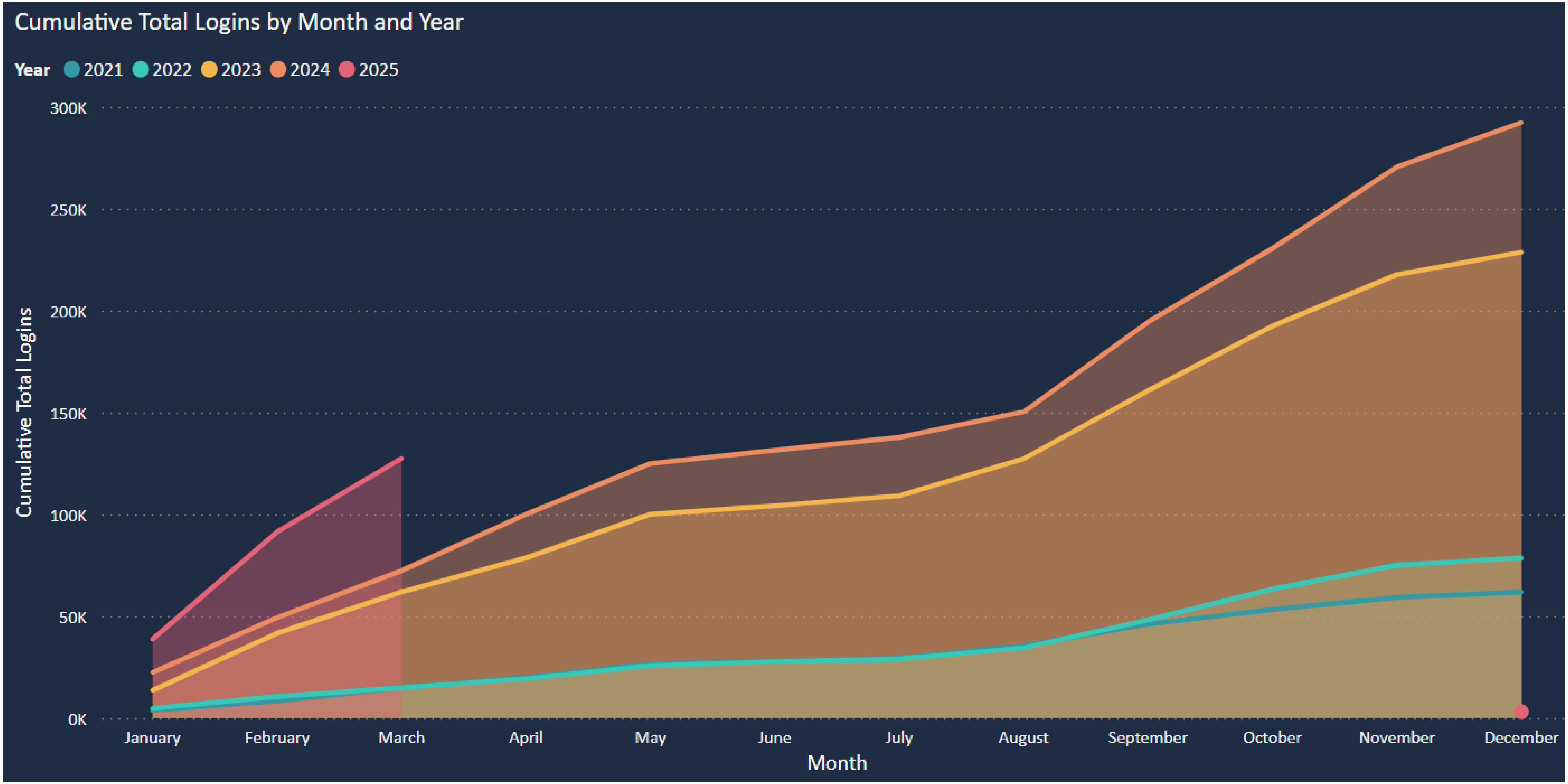
Our most international business


Subscription Revenue (CRR)
20 000
17 500
15 000
12 500
10 000
7 500
5 000
2 500
0
2022
2023
2024

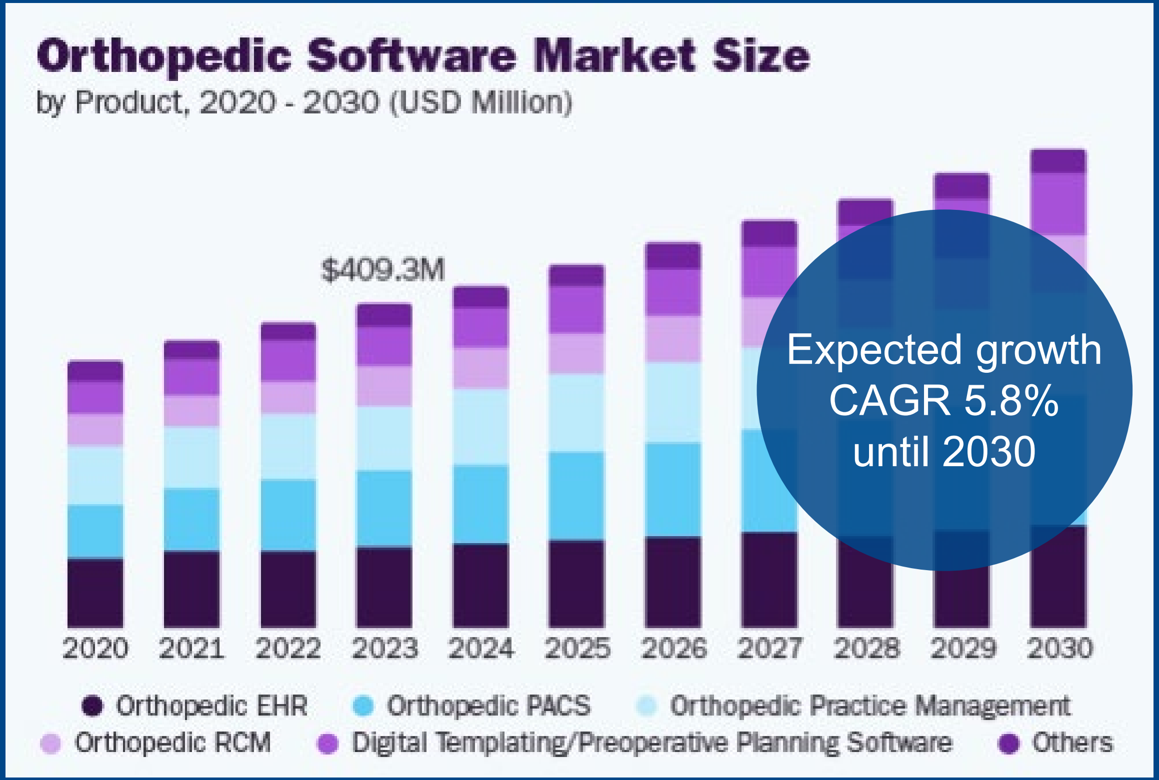


Cumulative Total Logins by Month and Year
Year 2021 2022 2023 2024 2025
300K
250K
200K
150K
100K
50K
0K
Cumulative Total Logins
January
February
March
April
May
June
July
August
September
October
November
December
Month

Orthopaedics

The challenge

- 1.71 billion people have MSK conditions (21%)[1]
- Leading contributor to disability[1]
- 30.5 million orthopaedic surgeries annually[2]
- 30-40% of all medical imaging
- 3rd largest healthcare cost



Source: Grand view research, Orthopedic Software Market Size, Share & Trends Analysis Report By Product

1. WHO Musculoskeletal health, July 14, 2022
2. Lifesciencemarketresearch.com, Dec 2, 2024

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Sectra Orthopaedics

Usage Dashboard

Annual Plans (R12)

Monthly Active Users (MAU)

3D Plans (R12)

Genomics

The challenge

- » Rapidly growing demands for DNA sequencing
- » Particularly in Oncology, but increasingly also in e.g Cardiology and other areas
- » More types of tests
- » A requirement for precision medicine
- » Needs to become “industrialized”

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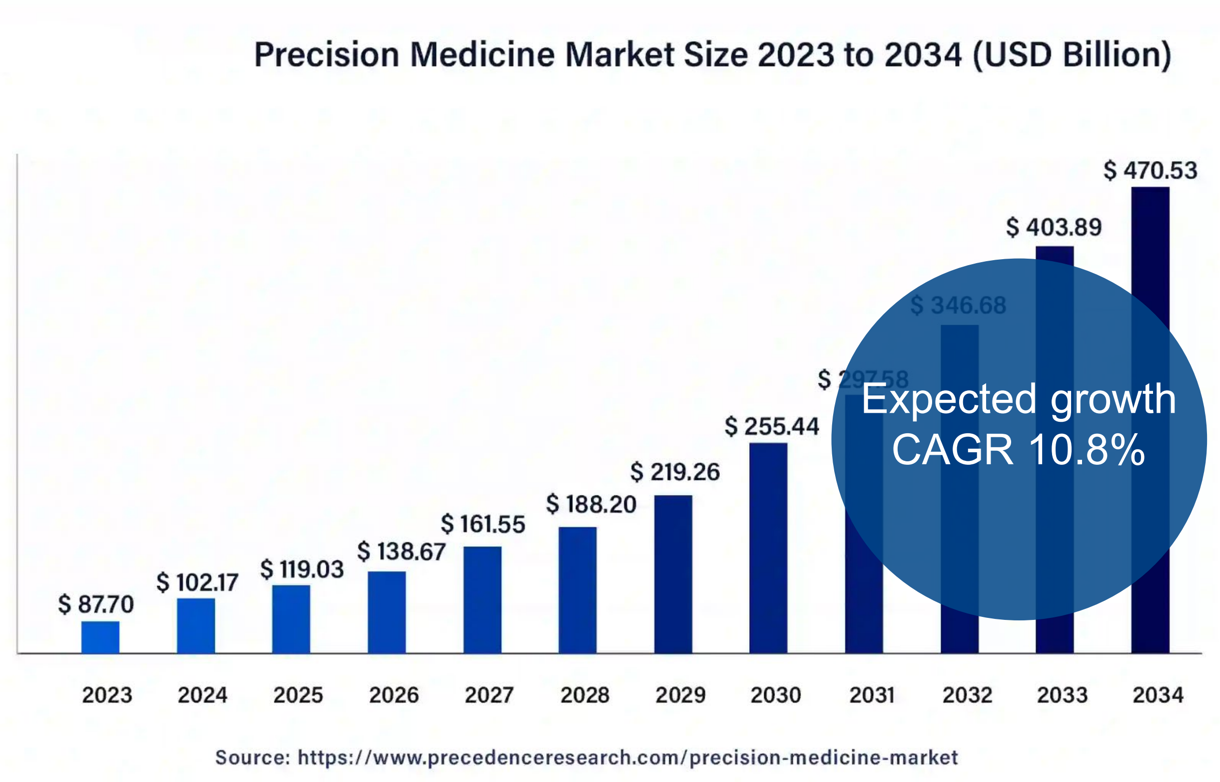
Growth drivers

Increased usage

- All areas of medicine
- In both staging, follow-up as well as preventive medicine

Reduction of cost, increased utility

- Steady stream of invention
- More data at the same cost increase utility

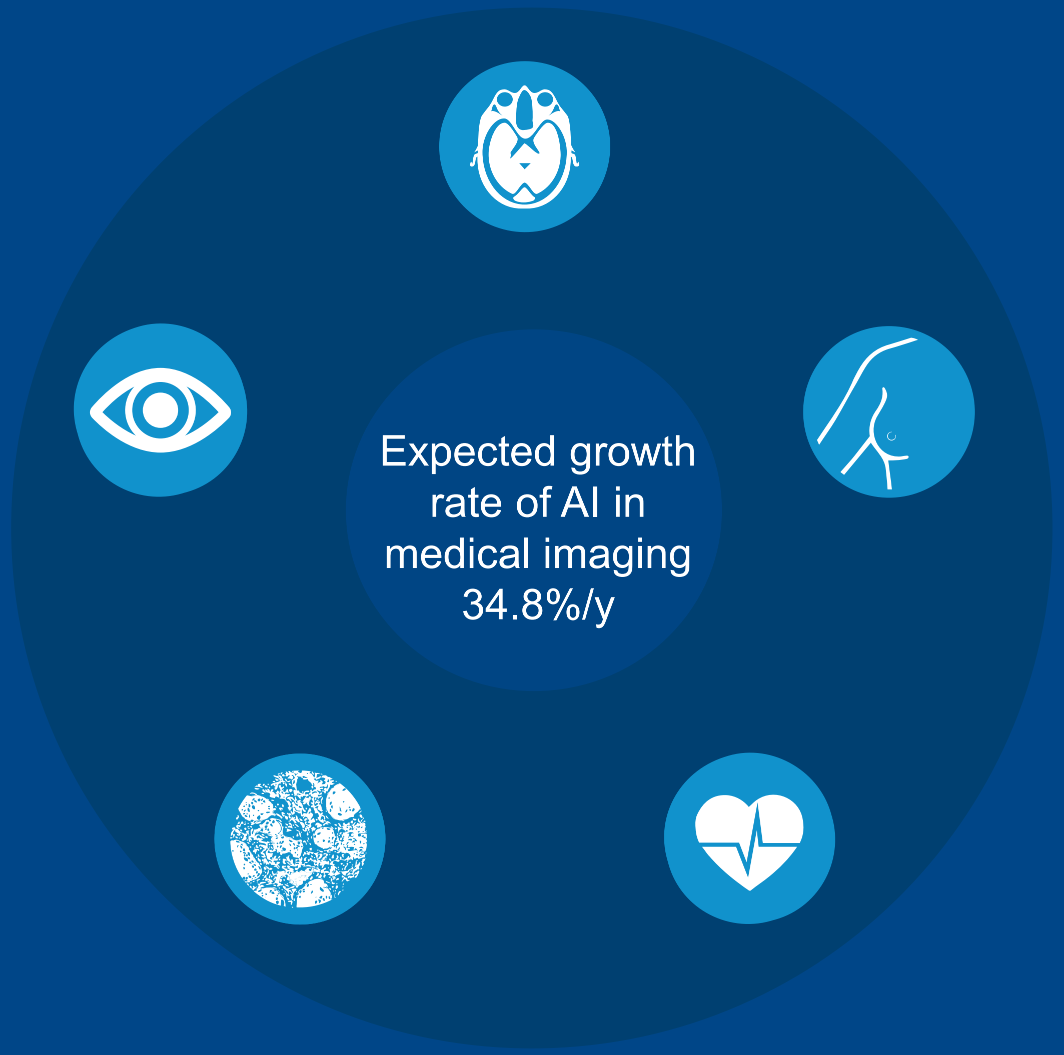


Source: Grand View Research, Precision Medicine Market Size, Share | Industry Report 2030

Amplifier, Sectra’s AI “app store”

The challenge

- » Rapidly growing demands for AI
- » Difficult business case for both vendors and customers
- » Integration complexity
- » Administration complexity



https://www.grandviewresearch.com/industry-analysis/artificial-intelligence-medical-imaging-market

100+
AI Applications

40+
Amplifier Partners & Integrators

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Amplifier customers

Amplifier Services delivers AI adoption at scale:

- Barnes Jewish, St Louis
- Greater Manchester, UK
  Regional deployment across 7 trusts
- North East London, UK
  Regional deployment across 3 trusts
- Northern Ireland, UK
  Regional deployment across 3 trusts
- Region Copenhagen, DK

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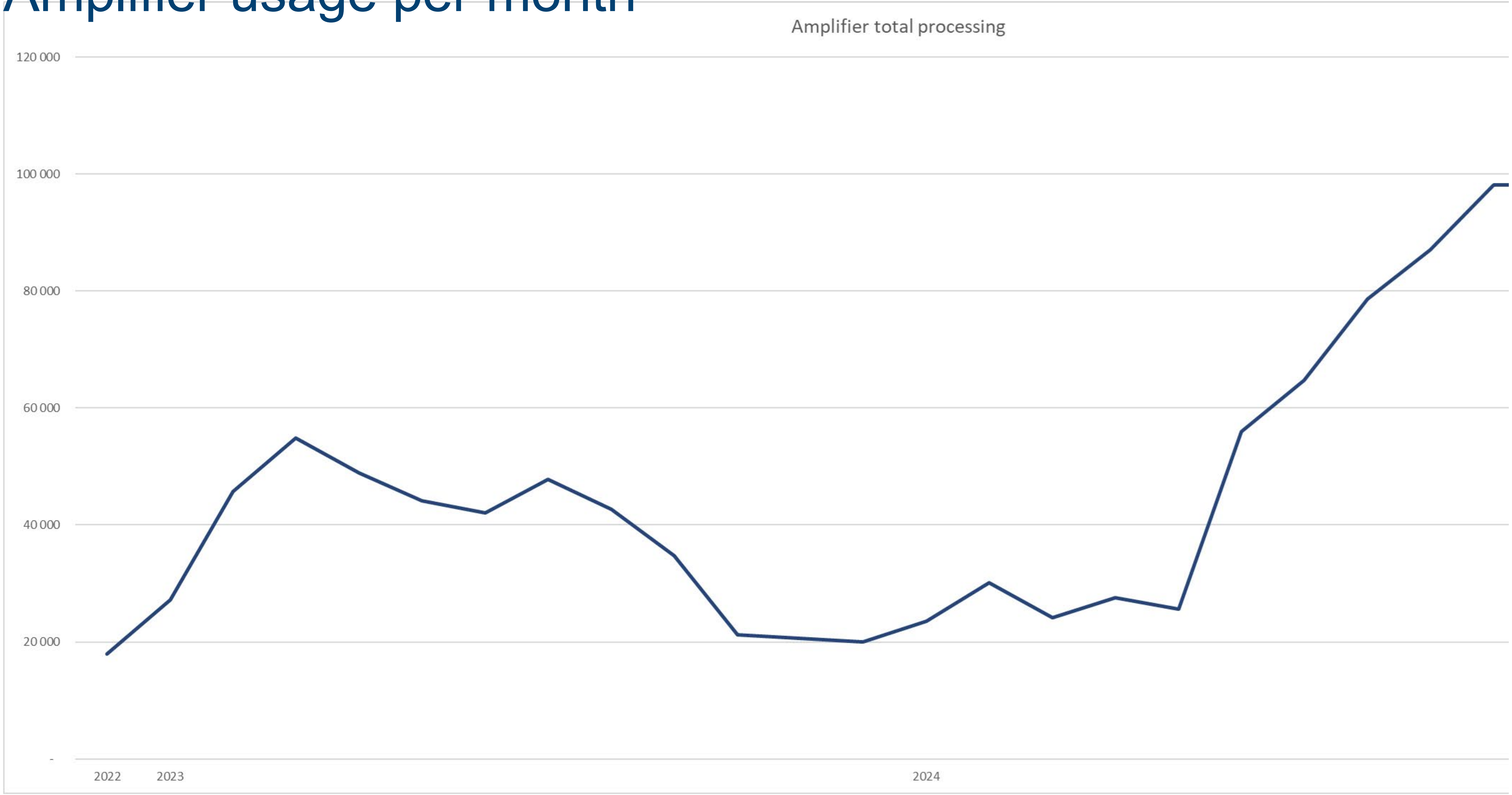
Amplifier usage per month



Pathology

The challenge

- Microscopy needs to be digitized
    - Workflow and cooperation
    - Tele-pathology & Working from home
    - Teaching
    - Need for AI
- Very large data sizes
- Image viewing completely different from radiology, but workflow similar

Sectra in pole position

- Sweden pioneered with a demonstrator 2012
- Sectra and Sweden lead the market
- Rapid growth in almost all countries
- Sectra is the only vendor with Pathology in the same system as Radiology
- Cross-sales with Radiology

https://www.globenewswire.com/news-release/2025/02/04/3020489/0/en/Global-Digital-Pathology-Market-Size-to-Hit-USD-2-92-Billion-by-2032-Growing-at-12-54-CAGR-SNS-Insider.html?utm_source=chatgpt.com

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Digital patology today

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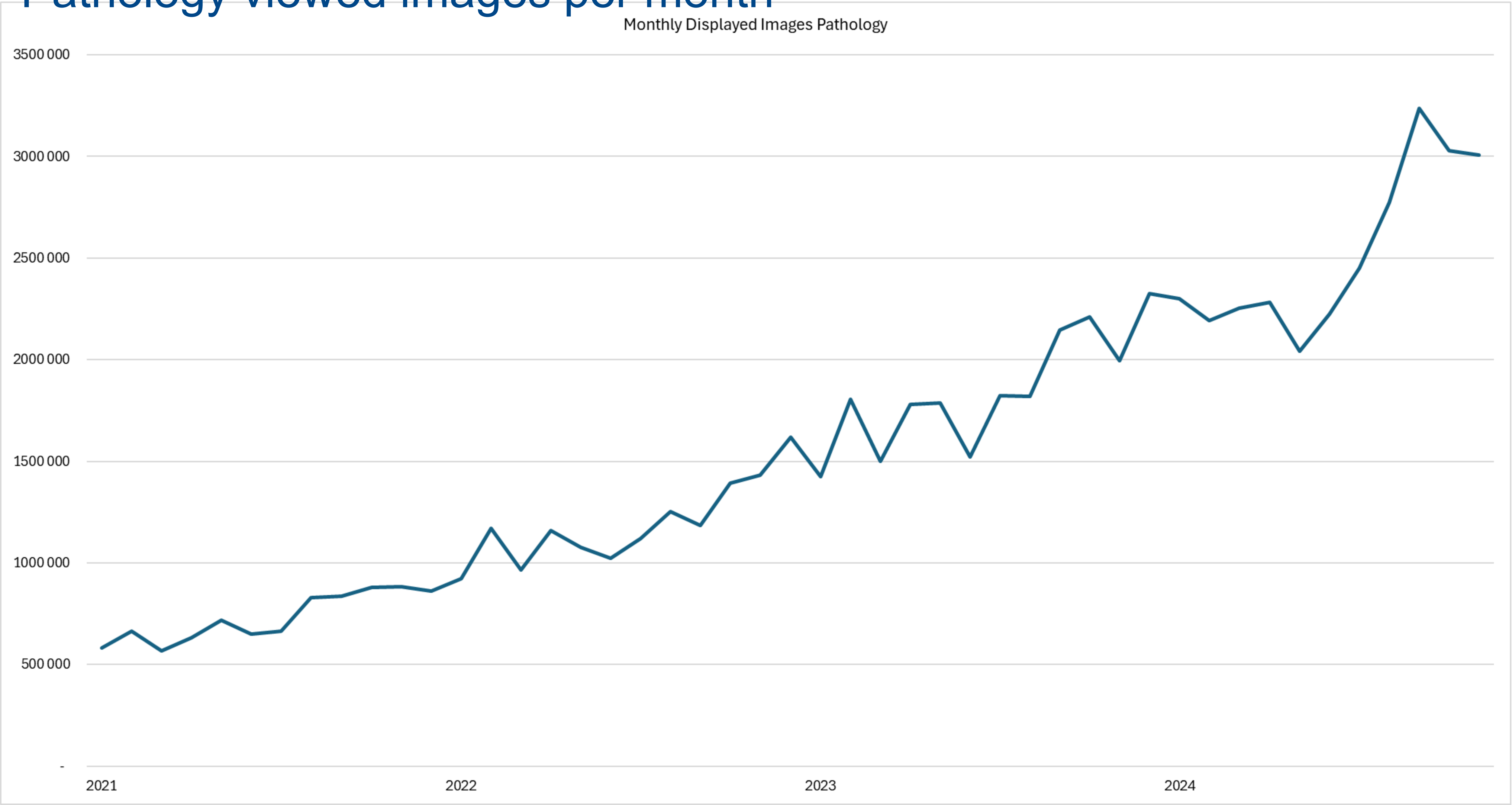
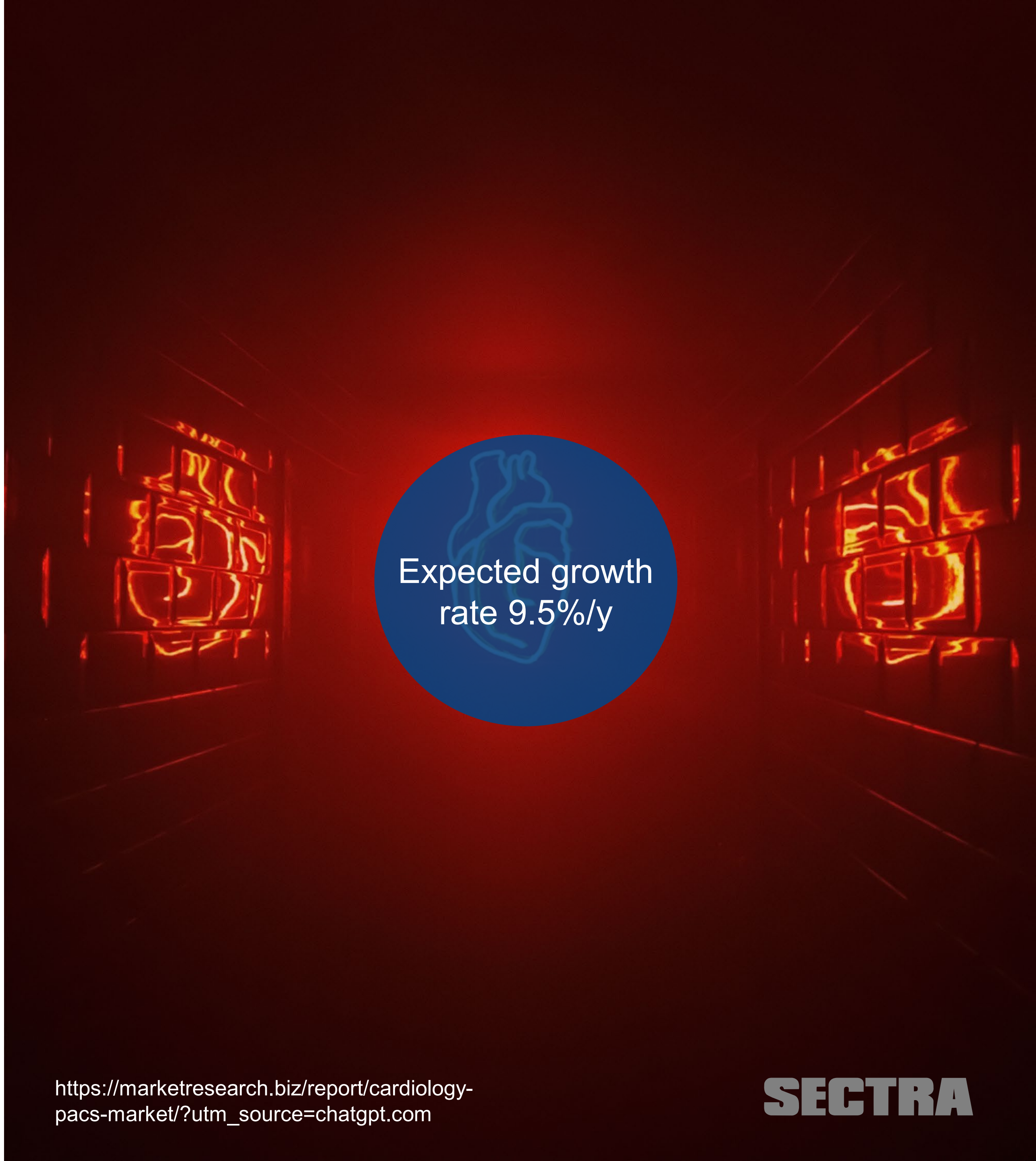
Pathology viewed images per month



Cardiology

The challenge

- Cardiovascular disease (CVD) is the single leading cause of death in the world [1]
  - 33% of all deaths (2x cancer)
- The single largest healthcare cost
  - Cost in the US is predicted to quadruple in the coming two decades [3]
- New technology decreases mortality
- but aging populations outpaces the advancement[4]



[1] WHO – World heart federation
[2] MI - Cardiovascular Ultrasound Market Size & Share Analysis
[3] Forecasting the Economic Burden of Cardiovascular Disease and Stroke in the United States Through 2050
[4] Global burden of cardiovascular diseases: projections from 2025 to 2050

Current state

- Transformed from reliance on 3rd party software to drive a strong native offering
- Built for the cloud
- Focus on the daily workflow and large examination volumes
- Flexibility when adding new sub-specialities by easily integrating web applications

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Knowledge and passion

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Imaging IT Solutions
– Overall strategy and position

Marie E Trägårdh
President Sectra's Imaging IT Solutions operation
and Executive VP Sectra AB

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Who I am

- President Sectra Imaging IT Solutions operations since 2012
- Joined Sectra 1996
- Background in computer science and healthcare
- Member of the Royal Swedish Academy of Engineering Sciences
- Bachelor of Science in Systems Science and IT
- Holds 174,000+ Sectra shares and additional LTIP share rights


BEST IN KLAS® PACS: CANADA 2025
BEST IN KLAS® PACS: SMALL (≤300K STUDIES) 2025
BEST IN KLAS® PACS: LARGE (>300K STUDIES) 2025
BEST IN KLAS® PACS: NORTHERN EUROPE 2025
BEST IN KLAS® PACS: SOUTHERN EUROPE 2025
Dedicated to customer satisfaction
Best in KLAS 2025
BEST IN KLAS® PACS: MIDDLE EAST/AFRICA 2025
new
BEST IN KLAS® DIGITAL PATHOLOGY: EUROPE 2025
new
BEST IN KLAS® PACS: DACH 2025
new

Current state

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Enterprise Imaging

Digital Pathology taking off

Brilliant workflows becomes more important

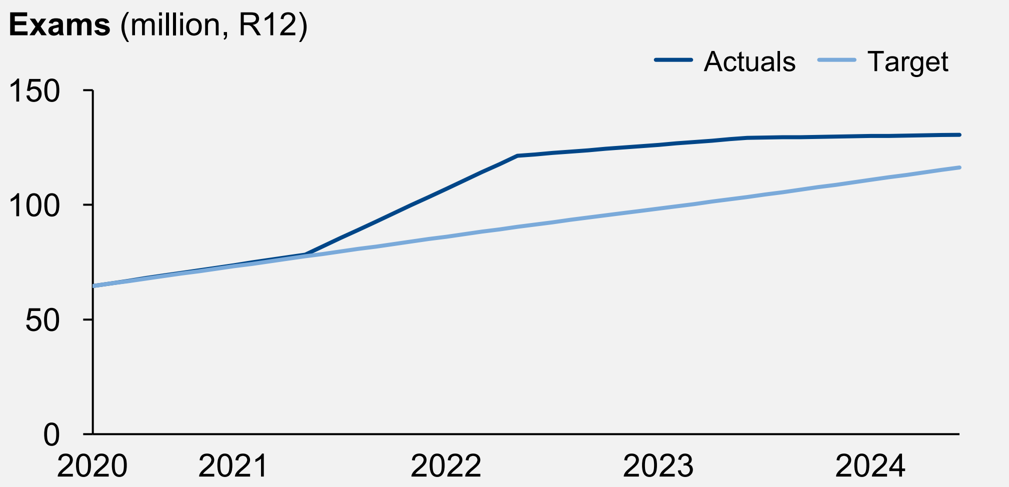
Consolidation

AI is essential

Software as a Service (Sectra One)

Number of exams and users

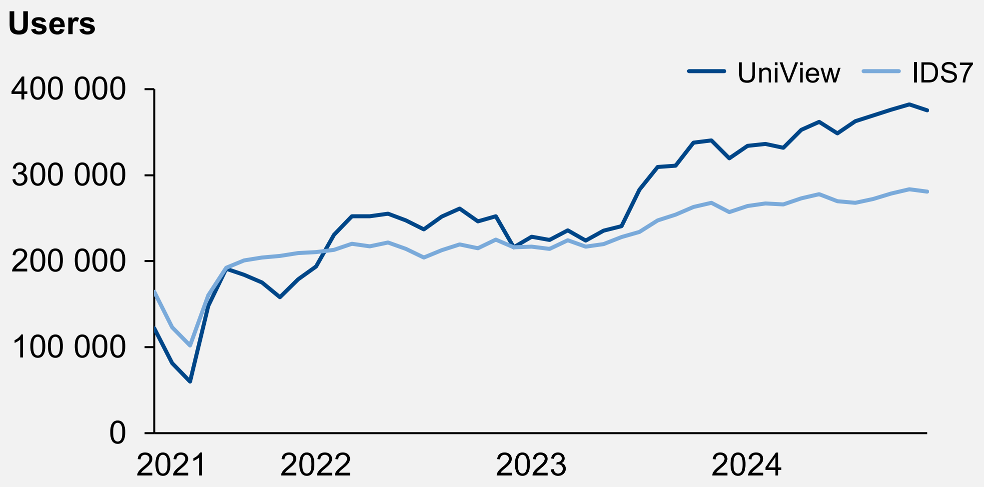
Exams per year



~150 million

exams per year

Monthly users



~350 k

Universal viewer users per year

~300 k

diagnostic users per year

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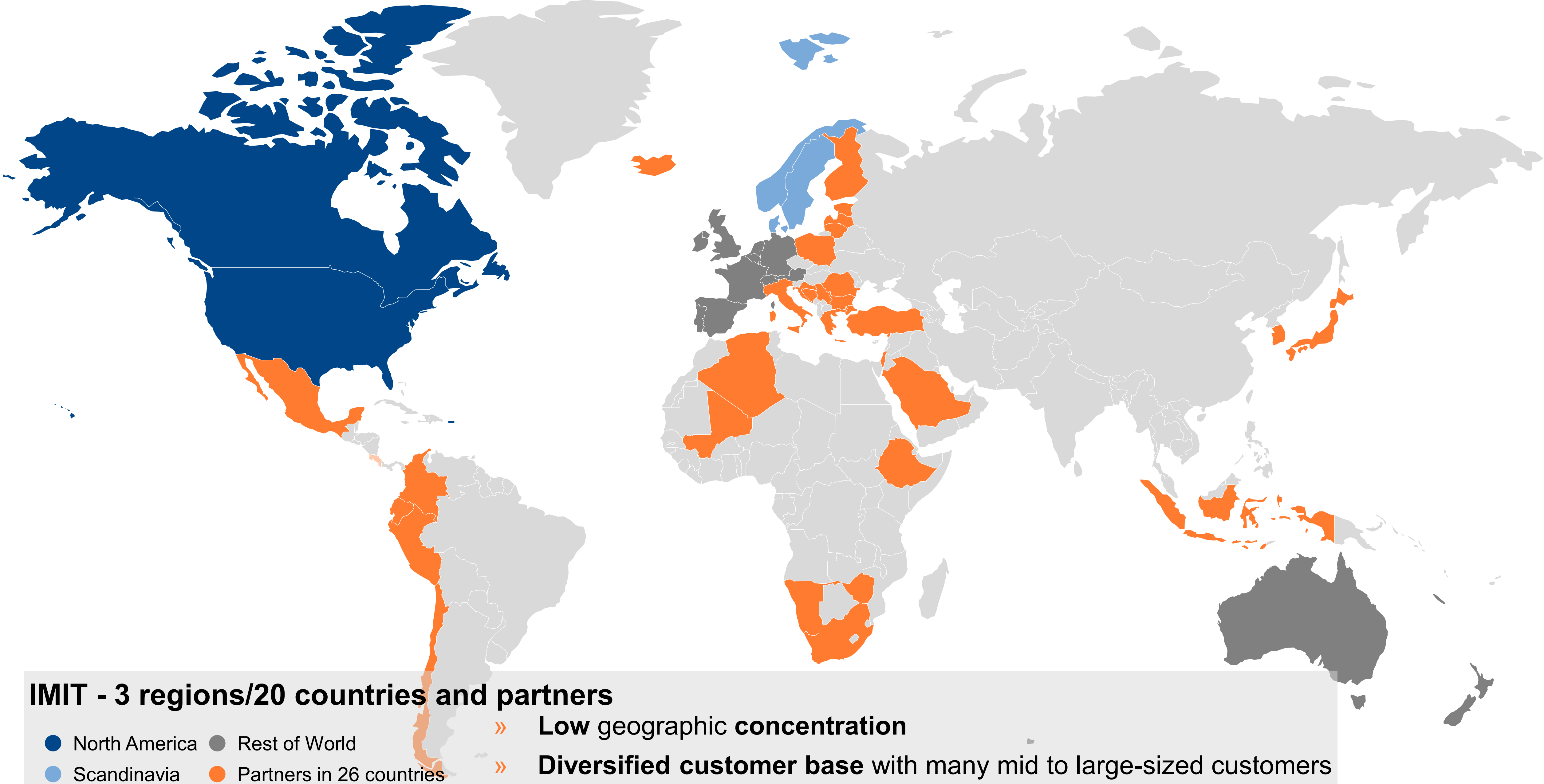

IMIT - 3 regions/20 countries and partners

- **Low** geographic **concentration**
- **Diversified customer base** with many mid to large-sized customers

Sectra´s Partner Markets **2025**

- **20** distributors
- **26** countries
- **+ 400** customers
- **+ 25,000,000** exams annually

Highlights in **North America**

- **US separate presentation**
- **Canada**: Recent win of Quebec
  Strong growth in the replacement market

Sectra **Canada** Sites Overview

14 →

12	OnPrem
2	Cloud

Installations

~4,000,000

Contracted Imaging Exams Per Year

8%

Market Share (estimated by volume)

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Sectra **Canada** Sites Overview

15

Installations

12 OnPrem
3 Cloud

~16,000,000

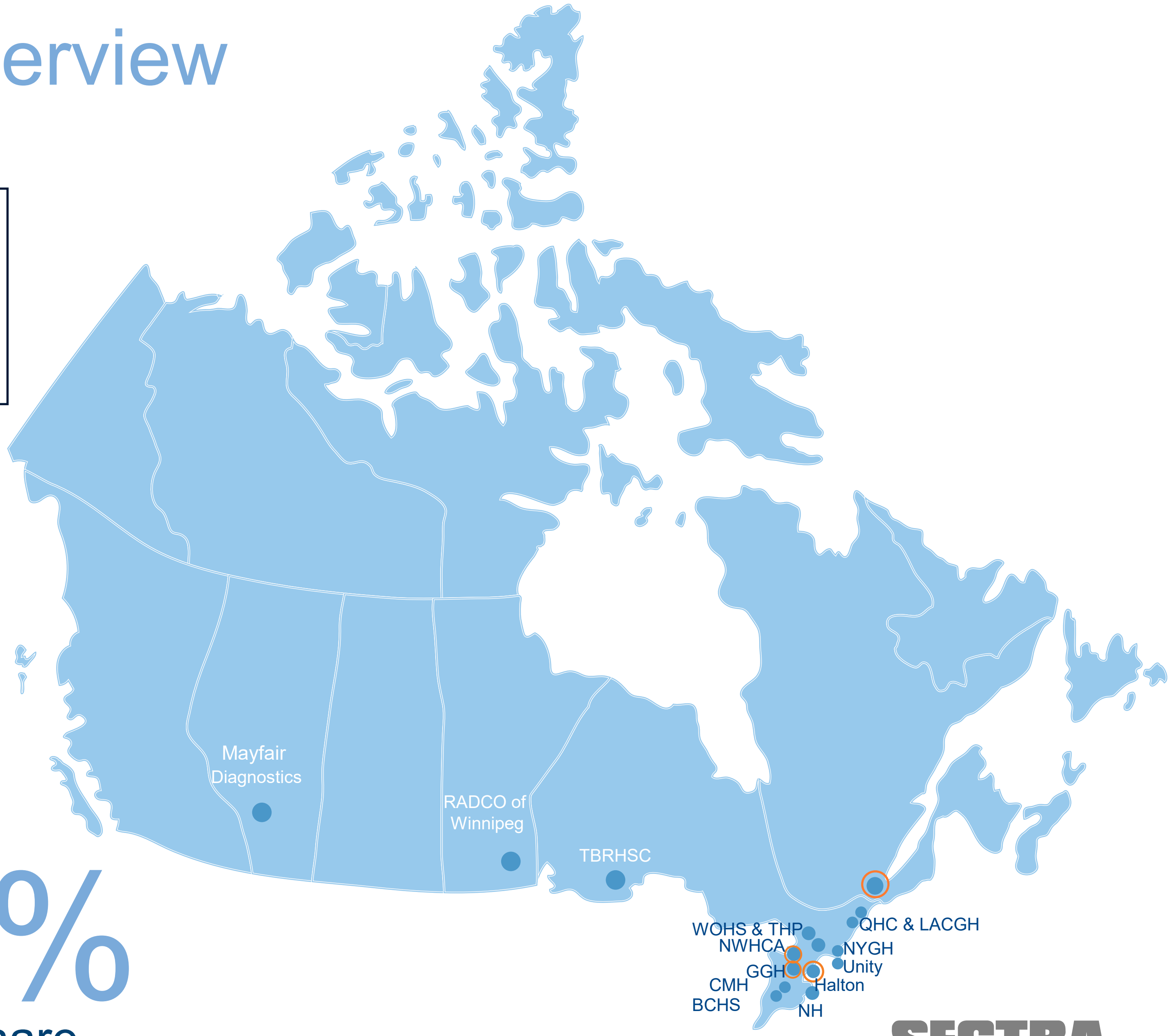
Contracted Imaging Exams Per Year

8%

Market Share

30%

Market Share



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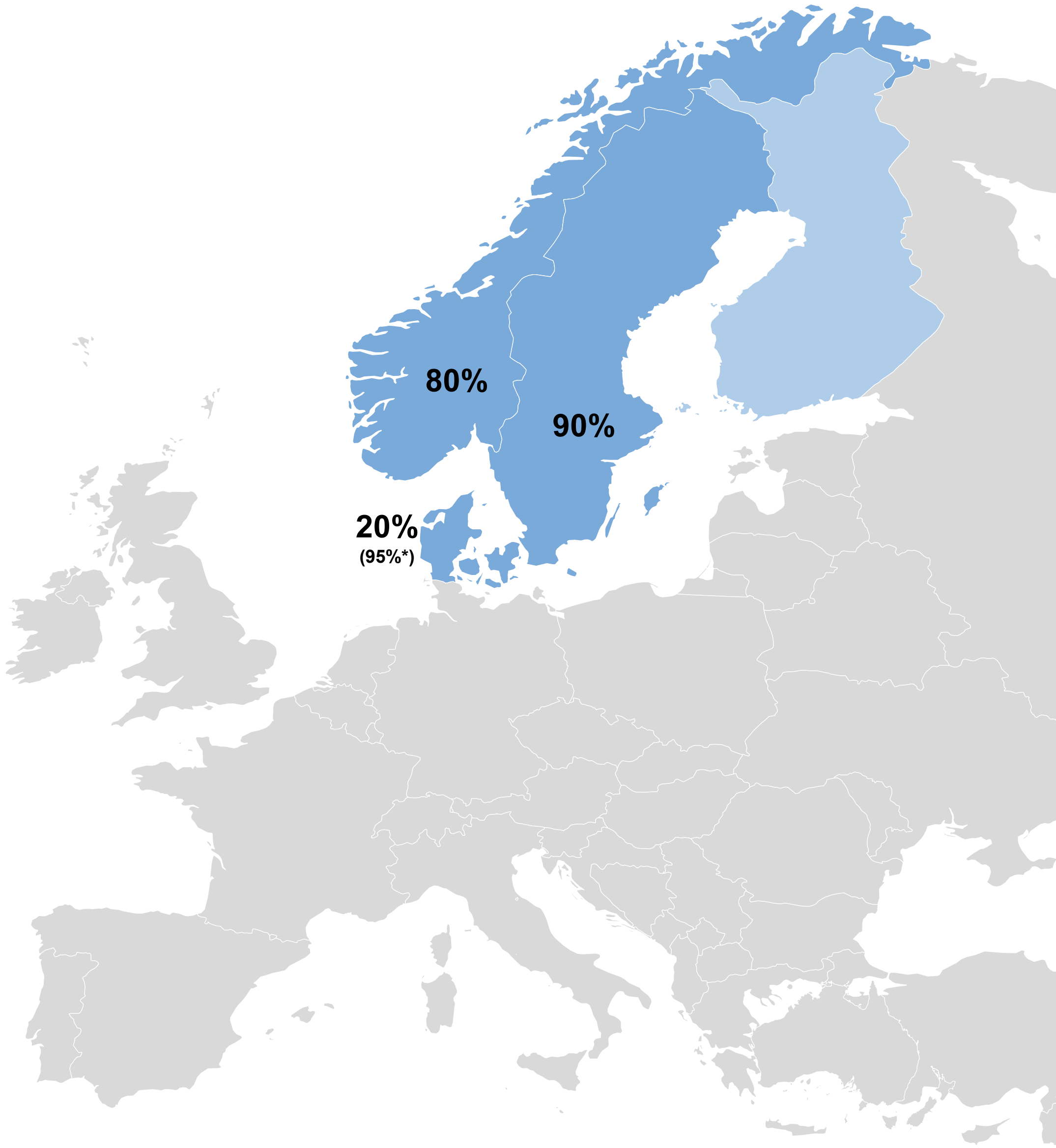
Highlights in **Scandinavia**

- Market leader in Scandinavia
- Capital Region of Denmark important for future growth in the Nordic countries. Still growing in all countries with add-on sales
- All new sales have been cloud based in Sweden last 5 years
- Today only private cloud solutions
- Most procurements are public



*Private healthcare providers

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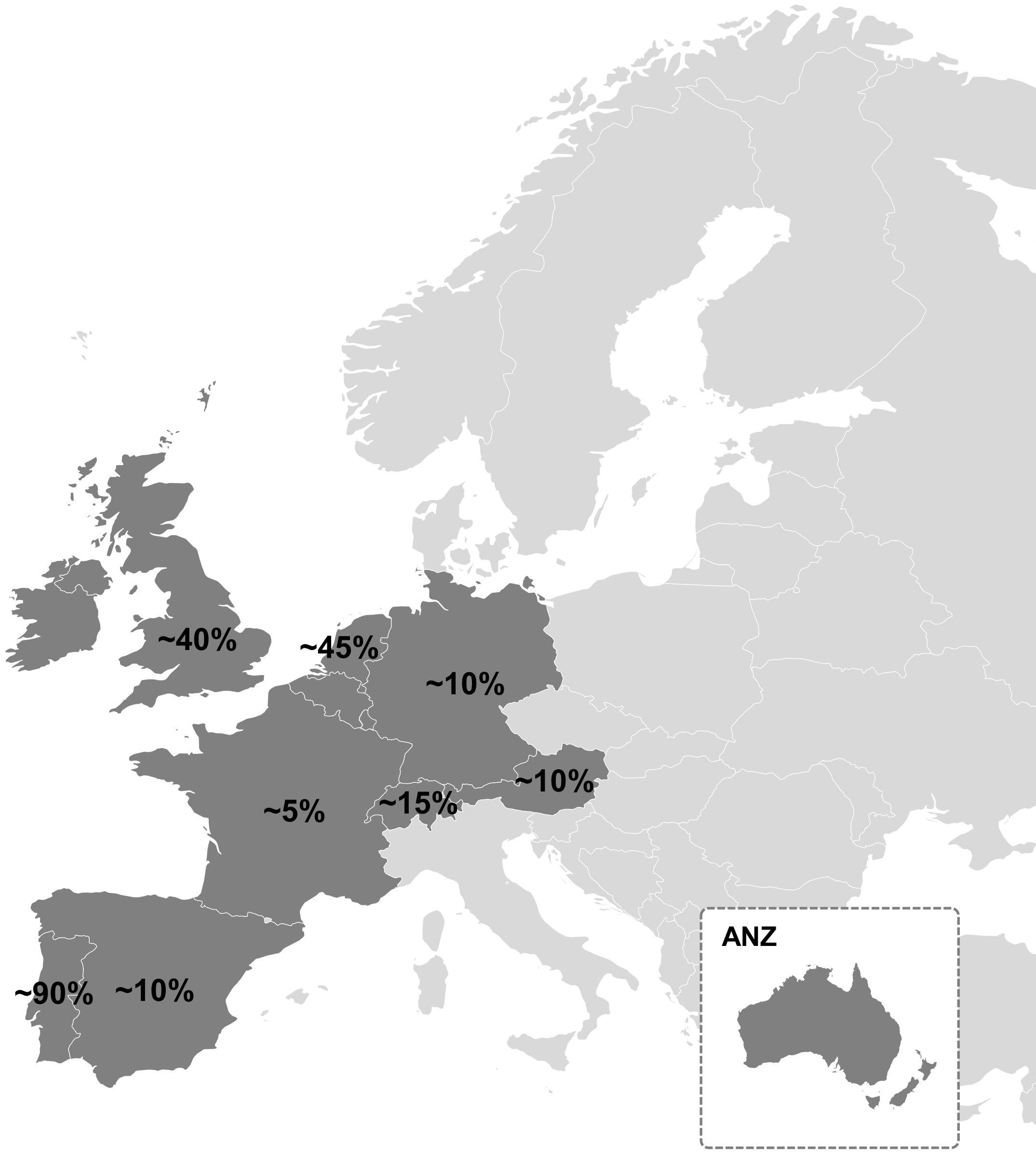
Highlights in **Rest of World**

- **Market leader, and still growing in:** United Kingdom, Portugal and the Netherlands
- **UK:** Fast cloud adoption
- **DACH, Belgium, Spain, ANZ & France:** Large growth potential
- **EU procurement** long term profit & complex sales but low churn



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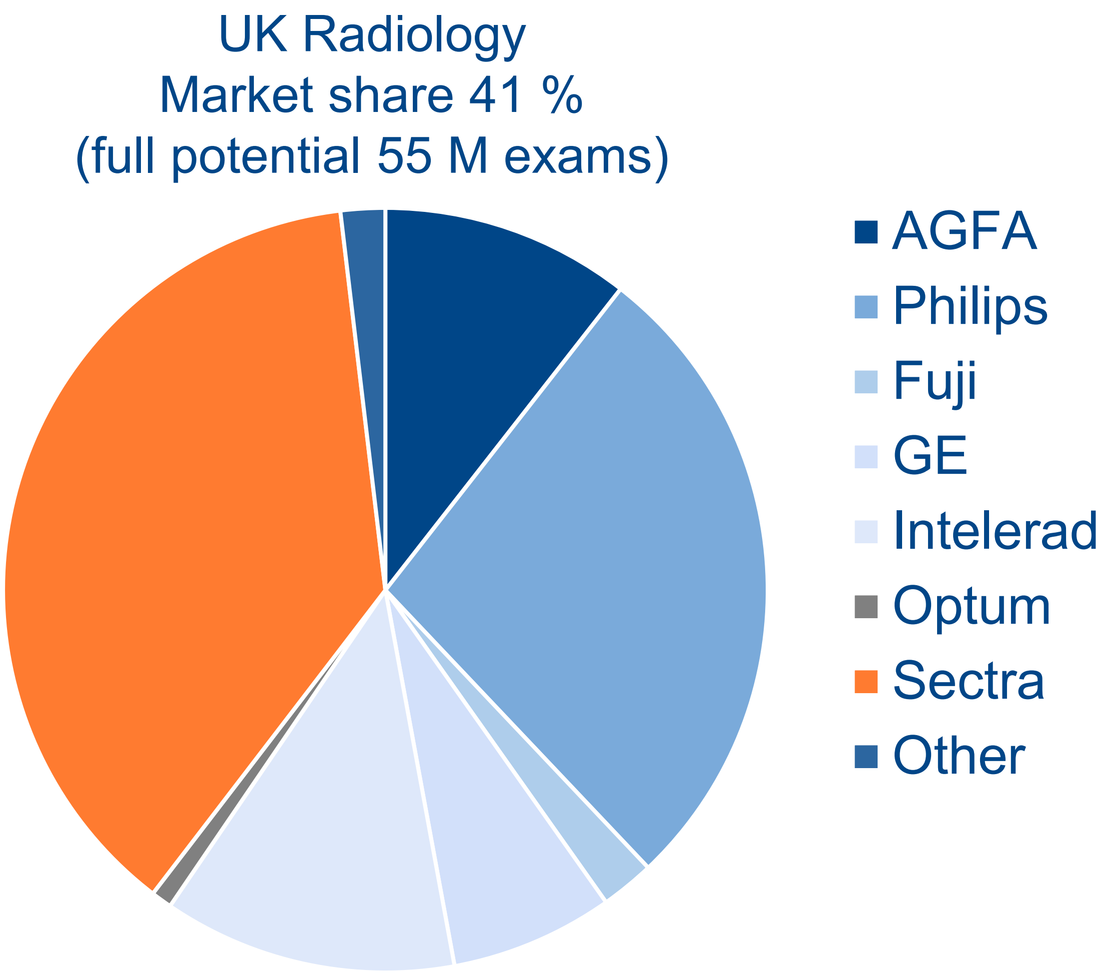
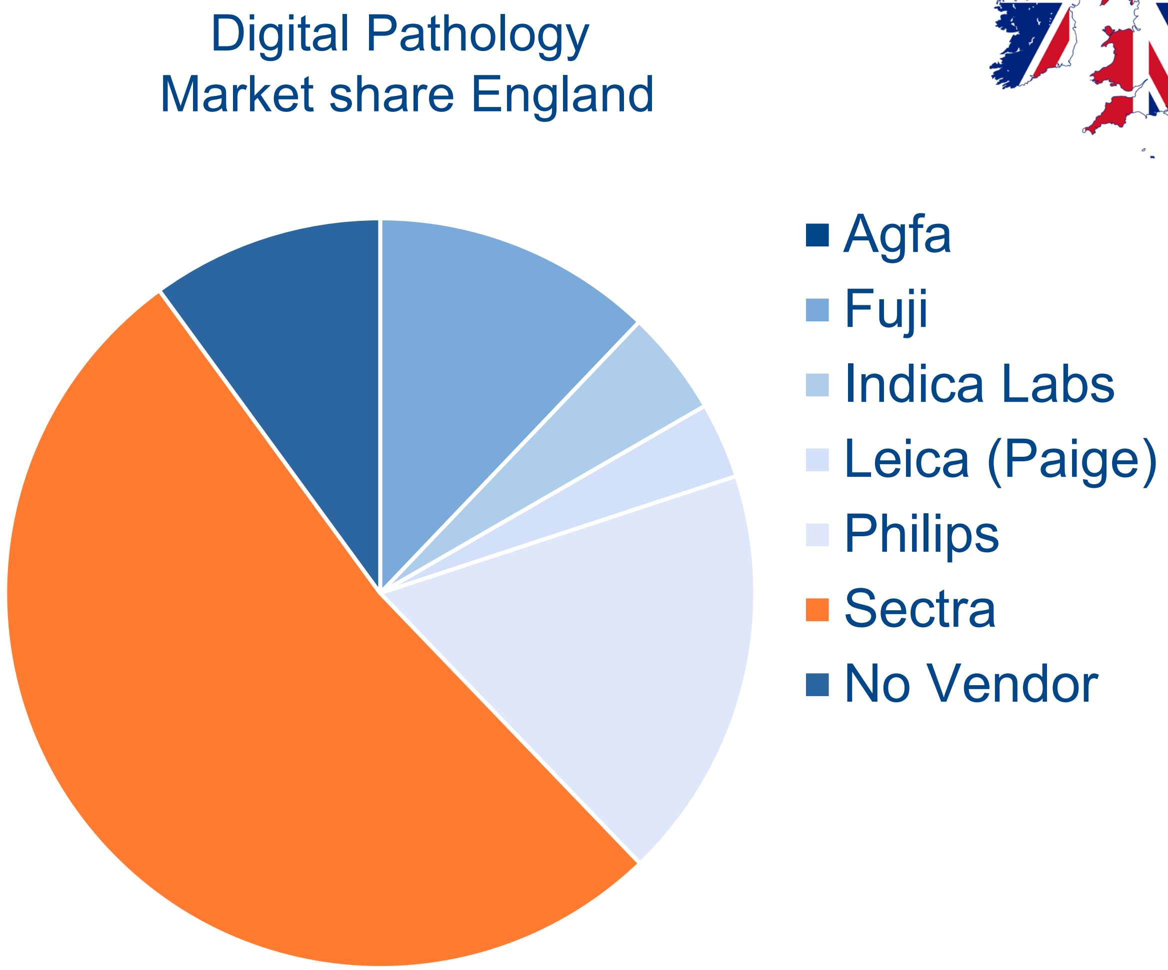
UK and DACH
two examples of growth potential

United Kingdom





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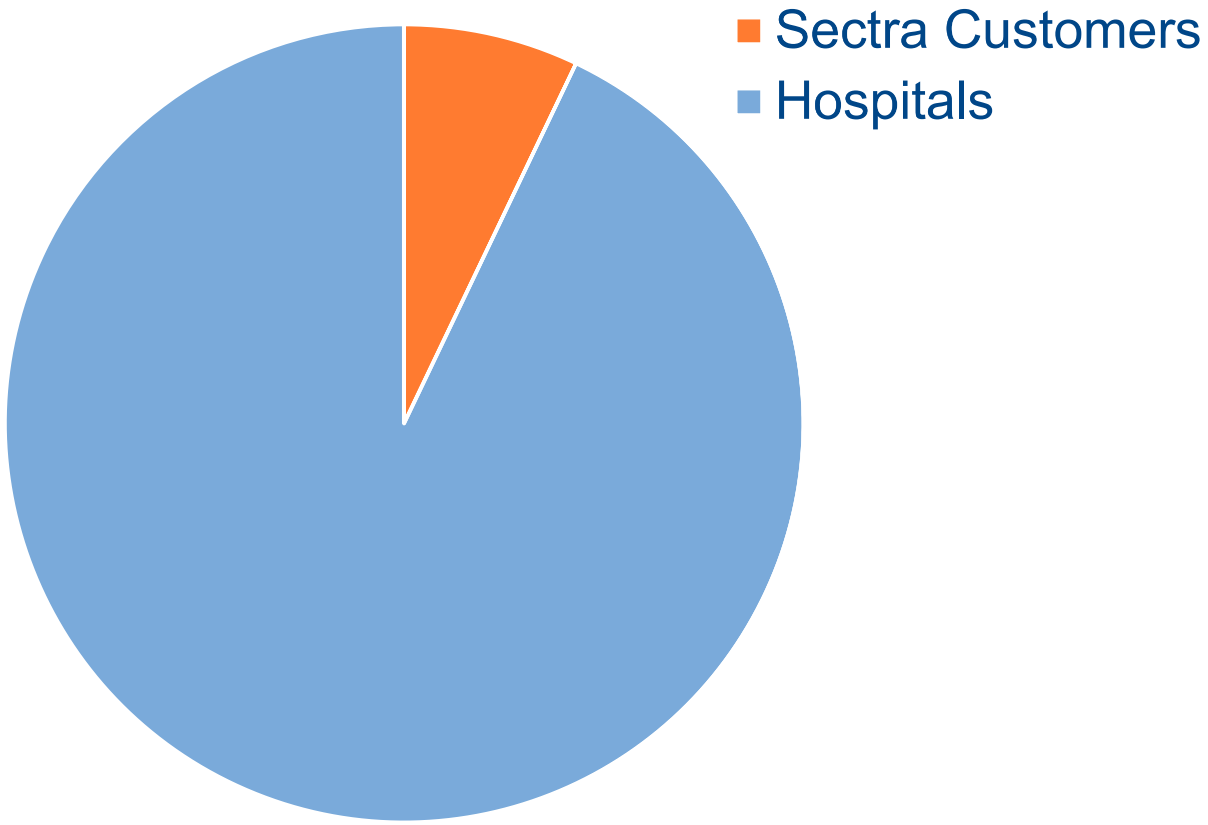
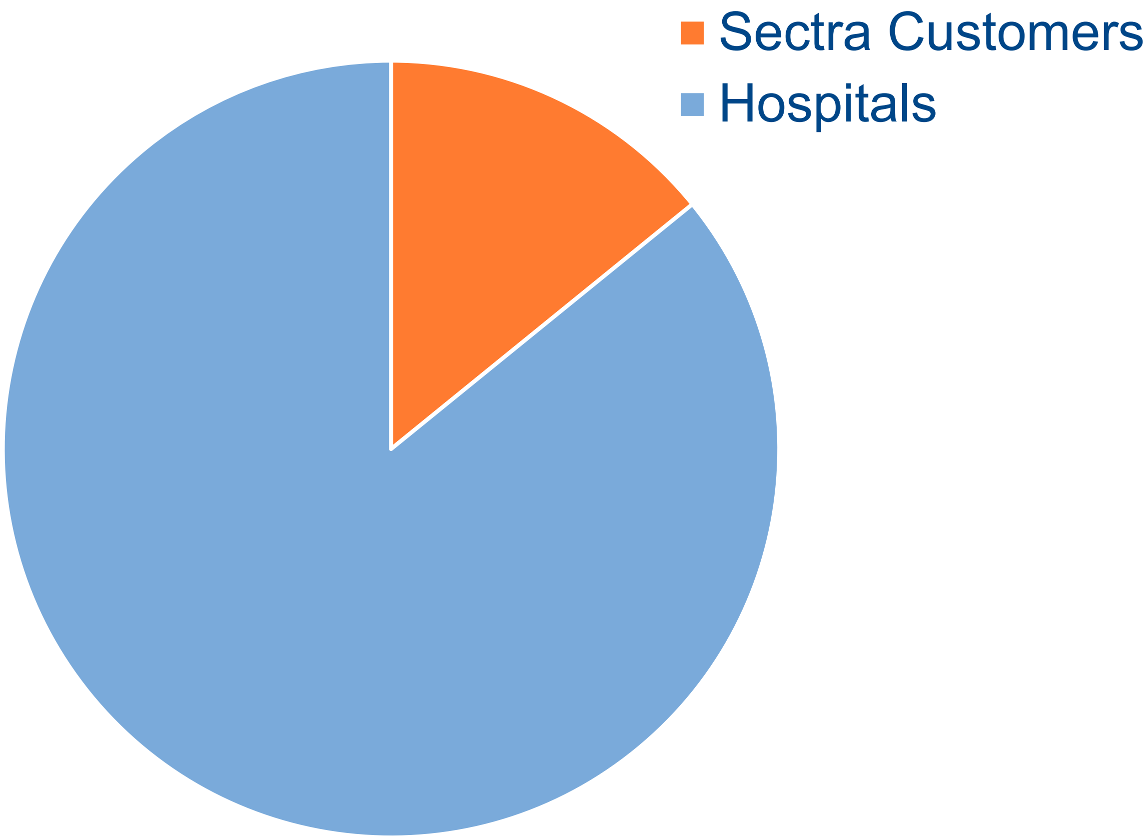
DACH

Germany market share 8%
(full potential 85 M exams)



Switzerland market share 16%
(full potential 8,85 M exams)



Customer operations

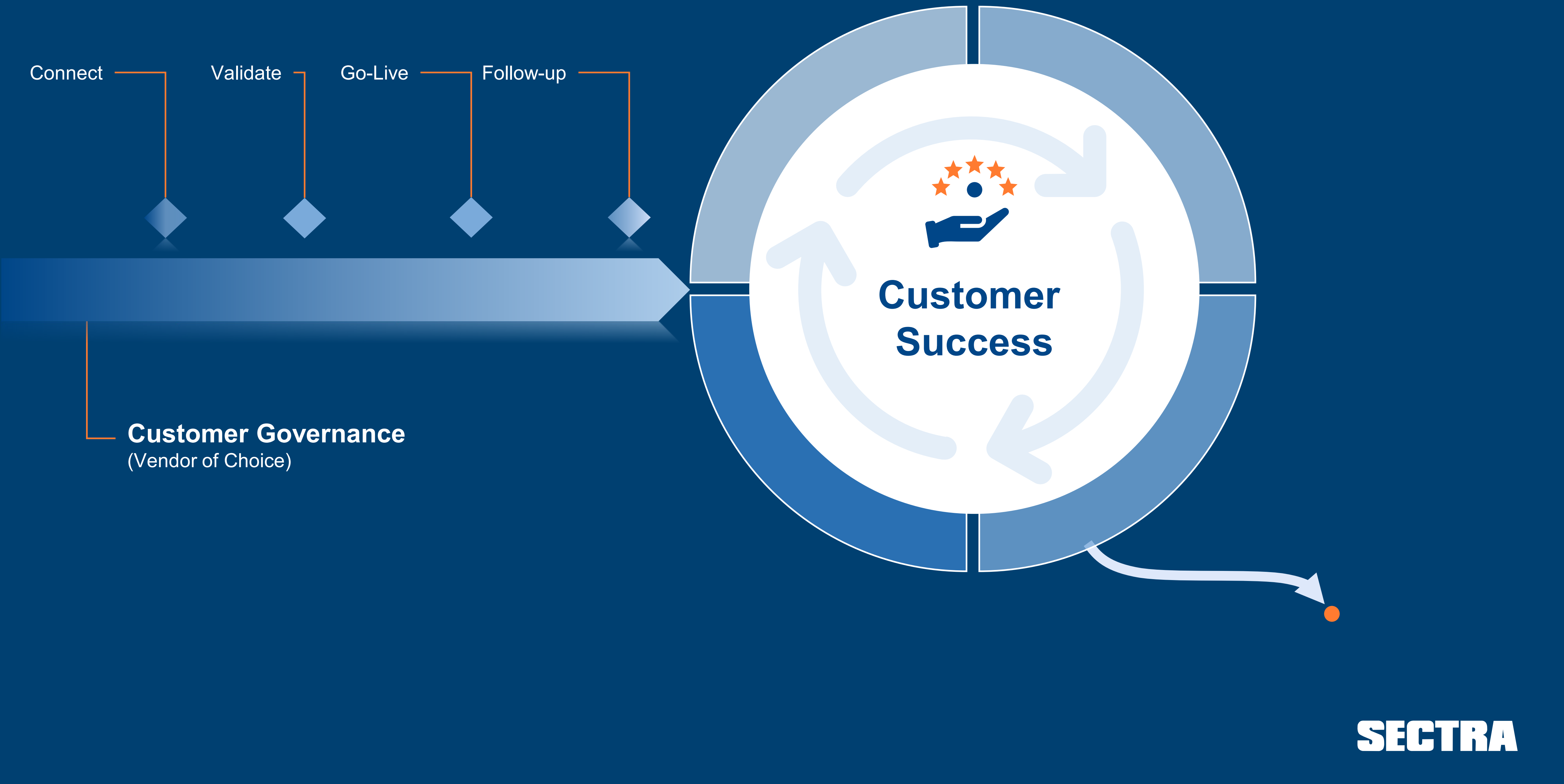
Dedicated team with in-depth site knowledge

Framework for a successful future for our partnership

Frequent meetings enhance operational efficiency

Service level in US is better than it ever has been *

* *KLAS reports*


Connect
Validate
Go-Live
Follow-up
Customer Governance
(Vendor of Choice)
Customer Success
SECTRA

Future state


Build for sustainable growth
Lead with customer success
Cloud first
SECTRA


ImIT: Number of Exams R12
ImIT
160M
140M
120M
100M
80M
60M
40M
20M
2019
2020
2021
2022
2023
2024
ImIT
Target
Actuals
SECTRA

Wanted state

"Our SaaS offering powers the world's largest diagnostic imaging providers, with the scalability, robustness and fault tolerance that comes with providing mission critical solutions at that scale"

Product

- **SaaS is our future**
- **Amplifier platform**
- **Customer-focused** service and **observability** of **usage**

Technology & AI

- Increased **efficiency** with **AI** in products and Sectra operations
- **Automation** for reliability, efficiency and security

Customers

- New customers with high **cloud-fit**
- **Converting** existing on-prem customers to cloud
- High customer satisfaction with **low to none churn**

Customer Journey

- **Sectra One Journey**
- Easy-to-use system
- Users can achieve market-leading diagnostic efficiency on their **own**

Future proof organization

- **True SaaS**" org. that operate at scale
- DevOps/Cloud Ops and **global** platforms
- **Cross-functional** teams

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The way forward

Global organization

Efficiency and Best practice

Customer Success

Sectra One Cloud


Enterprise imaging with the patient in focus
Pathology
Cardiology
Orthopedics
Enterprise capture
Breast imaging
Ophthalmology
Radiology
Genomics
SECTRA

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Knowledge and passion

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Imaging IT Solutions

– Product positioning and competitive landscape

Fredrik Häll
Head of Product Application

Who I am

- Leading the Imaging IT product portfolio since 2017
- Joined Sectra 2004 as Software Developer
- Since then, held various technology and product leadership roles within Sectra Imaging IT Solutions
- Master or Science in Media Technology and Engineering
- Has a passion for food and wine
- Holds Sectra shares and additional LTIP share rights

What
we do

Who
is the ideal customer

How
we bring value

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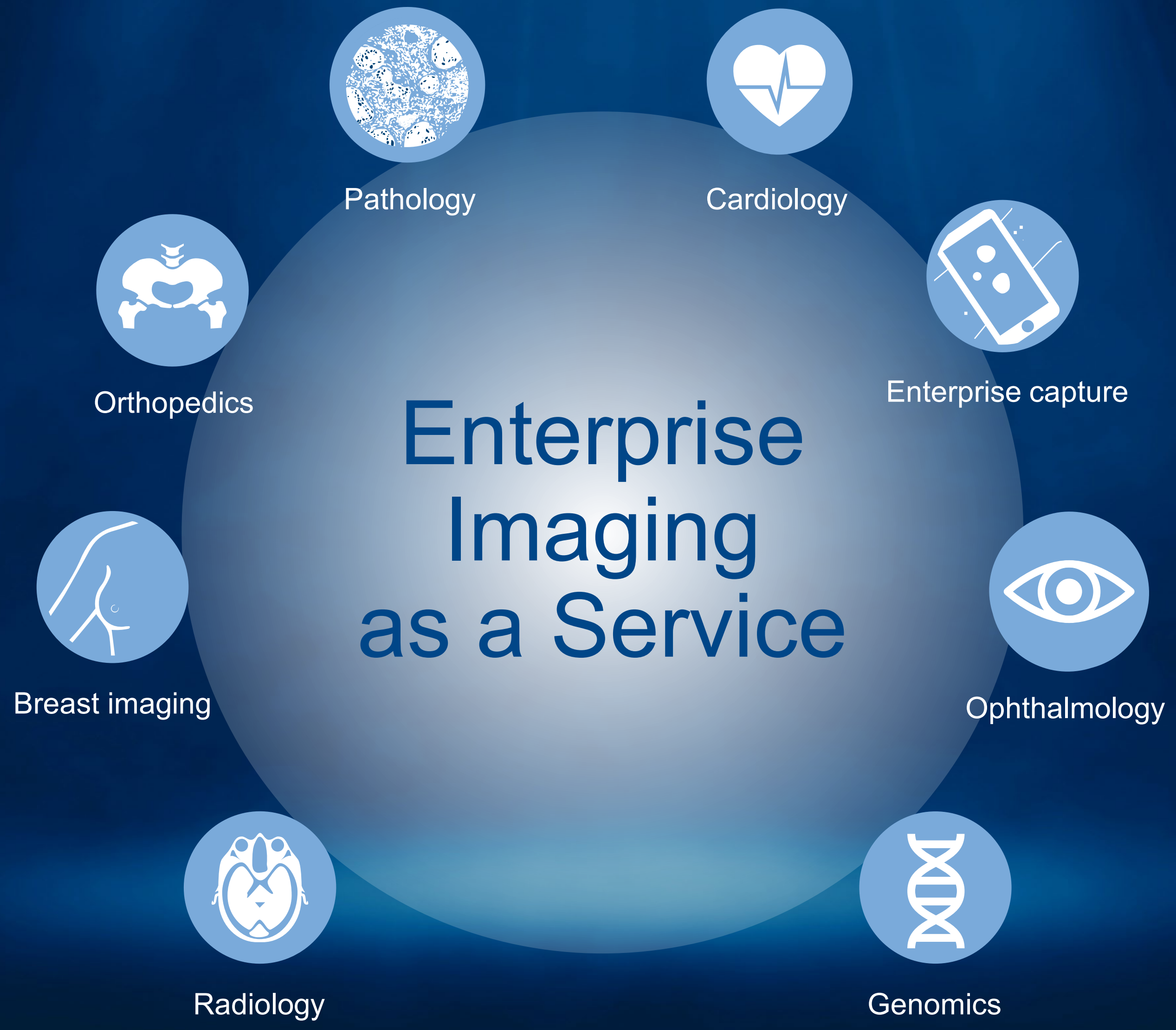
What - The Sectra Enterprise Imaging Platform



Strategic and financial customer benefits

Increased return on
R&D investments

Customer
savings

Reduced time
to value

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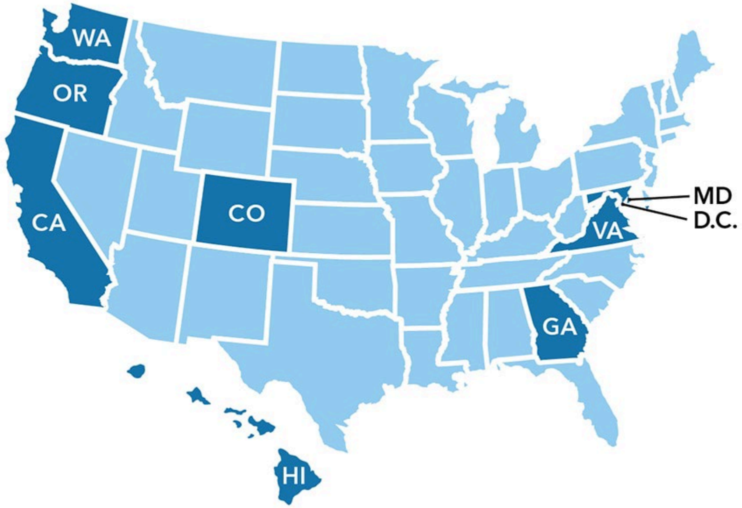
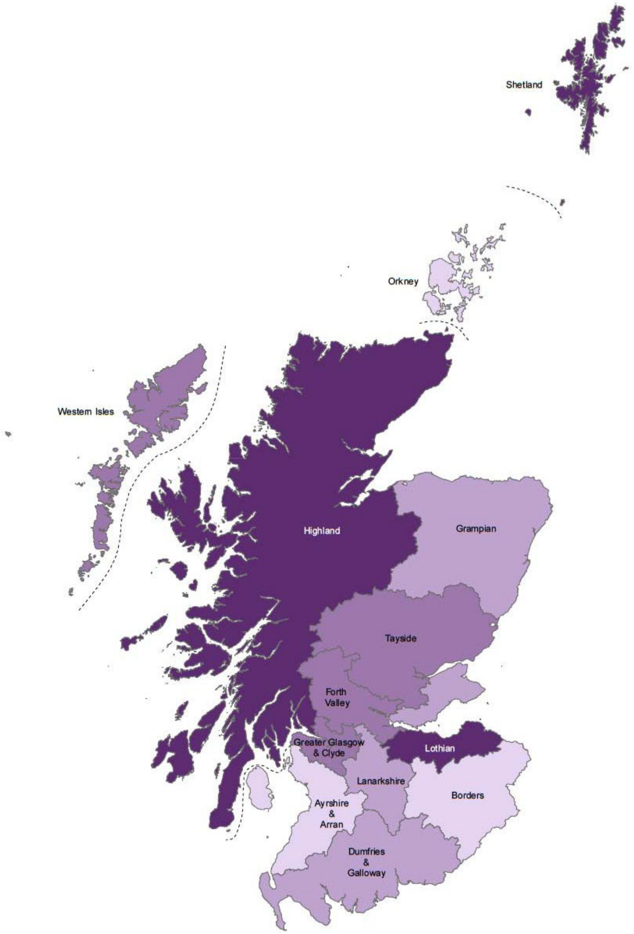
Who - Focusing on the largest healthcare organizations





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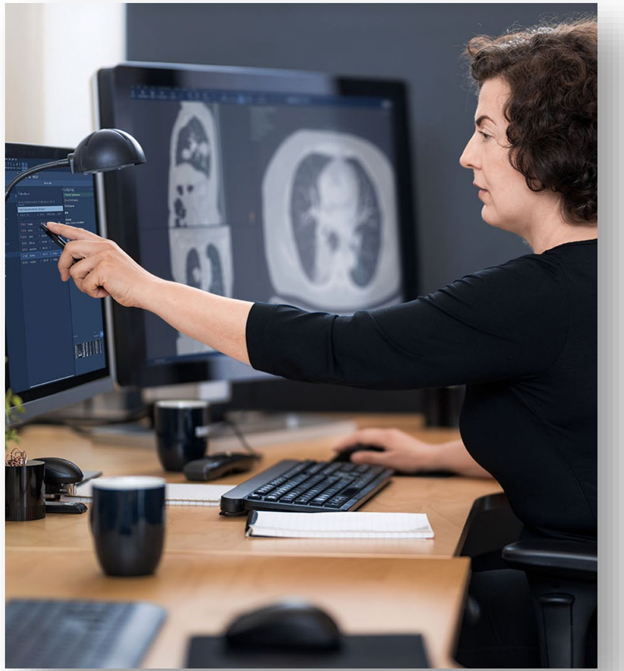
Differentiation and opportunities

High bar for competitors

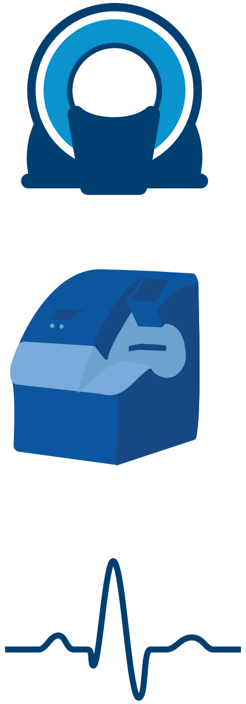
Opportunity for upsell

Long customer relationships

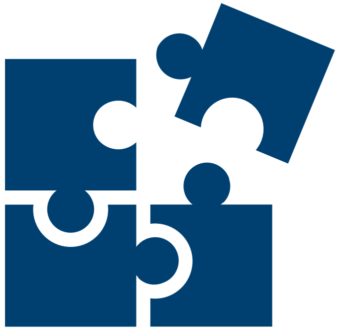
How - Providing productivity benefits



Productivity pressure!



Top performance for all workloads



Efficient workflows

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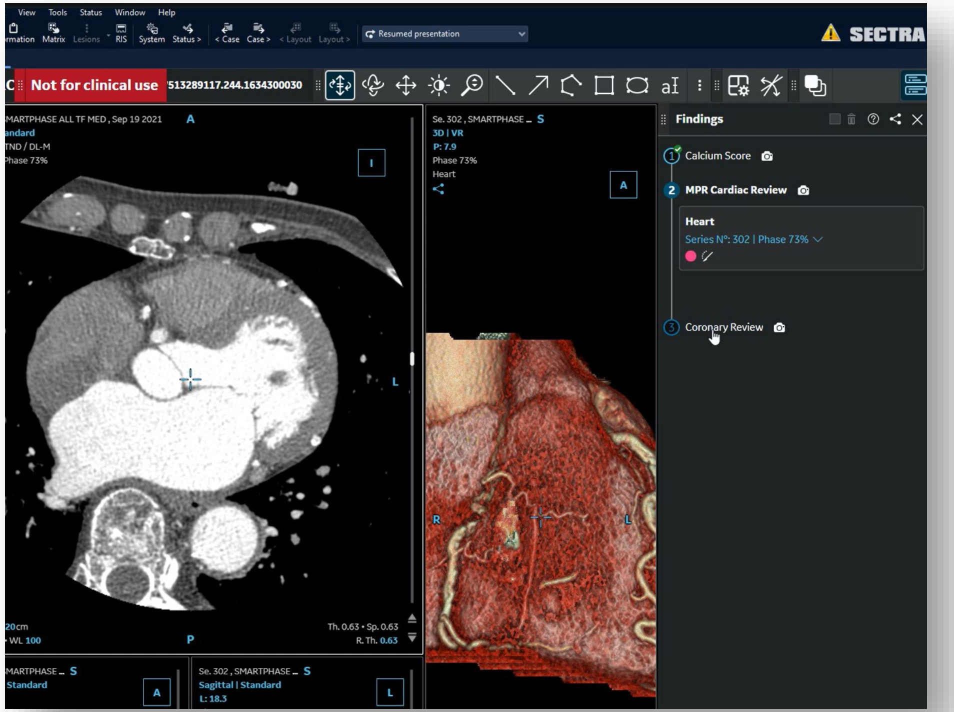
Productivity through Partnerships

Siemens PCCT



GE AW

...

More to come…

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Knowledge and passion

Q&A

Products on display

Radiology Imaging

Lisa Lindfors
Global Product Manager

Genomics IT

Fredrik Lysholm
General Manager

Cardiology IT

Björn Limber
Global Product Manager

Medical Education

Johan Carlegrim
General Manager

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Pause

– part 2 start 15:10

Sectra One and the transition to services

Fredrik Gustavsson
CTO

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Who I am

- Joined Sectra as CTO 2012, prior to that CTO at Cambio
- Intersection of technology, business and healthcare
- Runs large collaborations with Microsoft & Epic
- MSc Computer Science, MBA Financial management
- Holds Sectra shares and additional LTIP share rights

Sectra Enterprise Imaging
Genomics
Radiology imaging
Breast imaging
Digital pathology
Cardiology imaging
Orthopedic planning
Ophthalmology imaging
Enterprise capture
Enterprise archive
Enterprise Research
Enterprise exchange
Amplifier Services

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Sectra One Cloud

Comprehensive
Predictable
Scalable

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Today:

Thousands of customer environments

Complex!

SaaS/Cloud

Automation

+ AI

Efficiency, scalablity through SaaS

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Usage based pricing

both on prem and in cloud

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How we help our customers

Pains & opportunities

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AI & Scalability

Access AI, Digital Pathology and Genomics

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Security

Average cost* of a breach is ~$10M

** HIPAA Journal 2025*

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Adoption and growth

~85%

of order intake R12 is Cloud

+44%

Cloud Recurring Revenue 9 months y-o-y

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Sectra One Cloud (SaaS) → recurring revenues

Previously licenses were recognized upfront

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Example

Sectra One Cloud (SaaS)

500 k$ (Software + maintenance)
over 6 years contract time

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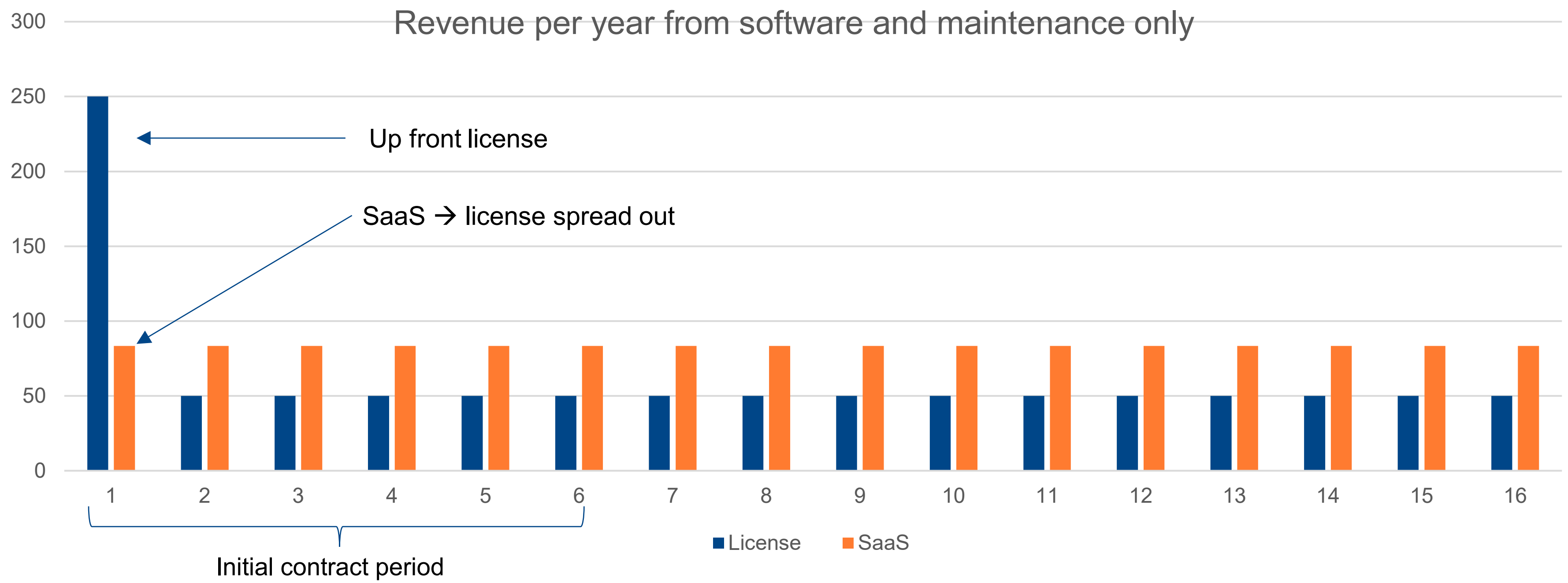
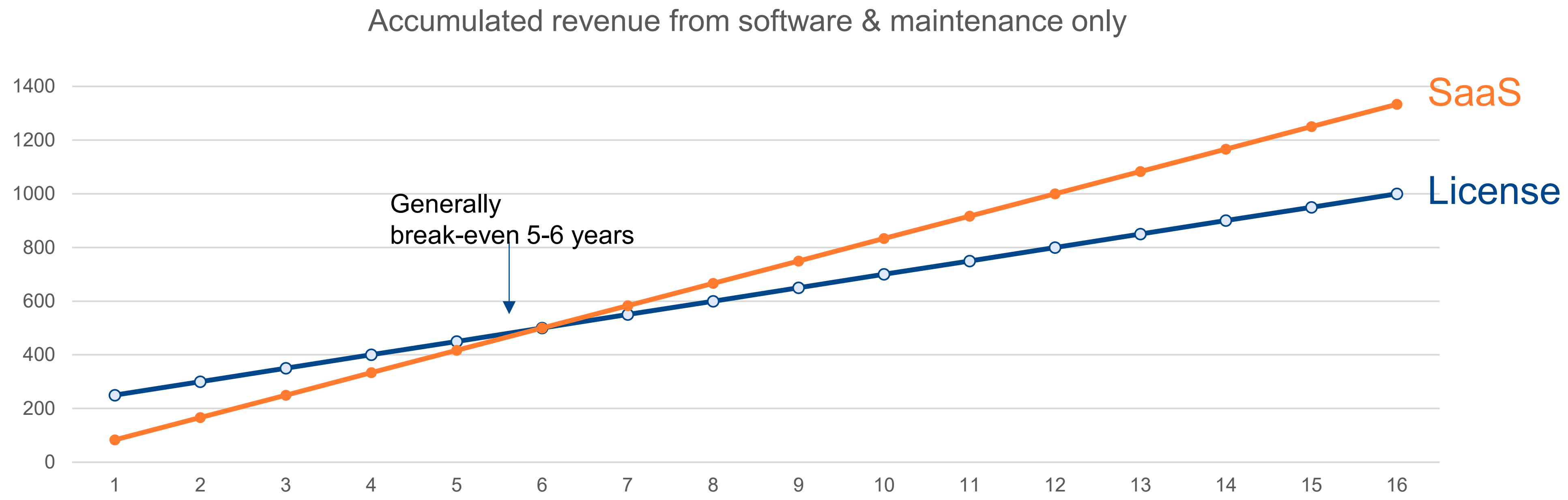


License sale

16 years total revenue
=1000 k$

SaaS sale

16 years total revenue
=1333 k$



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Public cloud and mid to long term effects

Transition to SaaS/Cloud

- Balance sheet
- Cashflow
- Profit margins
- Sustainability

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Knowledge and passion

US market and opportunities

Isaac Zaworski
President Sectra's US operation

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Who I am

- Imagery nerd, innovator, and big-picture thinker
- Joined Sectra 2021 as President of the US operations
- Background in US Defense and Intelligence industry, previously CEO of the Swedish/American joint venture Vricon
- Bachelors and Masters in Mechanical Engineering
- Holds Sectra B shares and additional share rights

BEST IN KLAS®
PACS:
LARGE (>300K STUDIES)
2025

BEST IN KLAS®
PACS:
SMALL (≤300K STUDIES)
2025

Around the clock excellence, **12 years in a row**

Best in KLAS 2025

Sectra **US** Sites Overview

122 →

115	OnPrem
7	Cloud

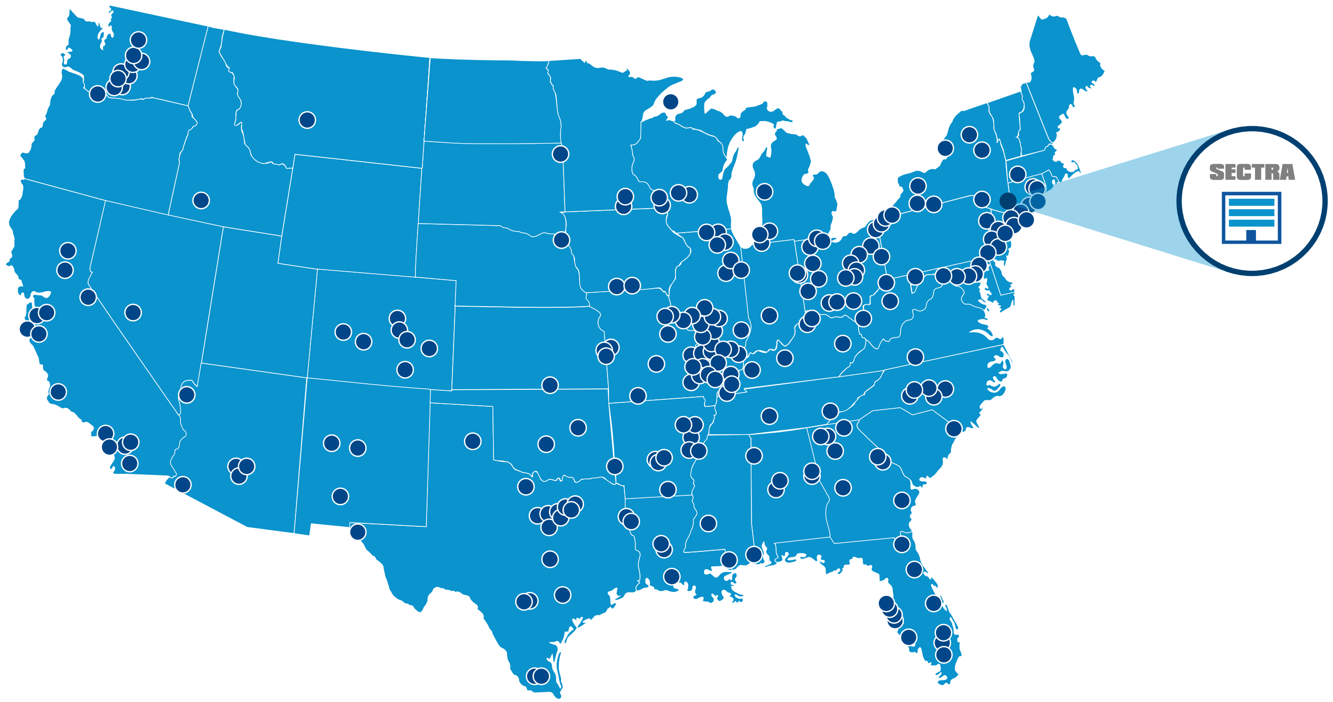
Installations

~62,000,000

Live Imaging Exams Per Year

8%

Market Share (estimated by volume)



Sectra **US** Sites Overview

133 → 110 OnPrem, 23 Cloud

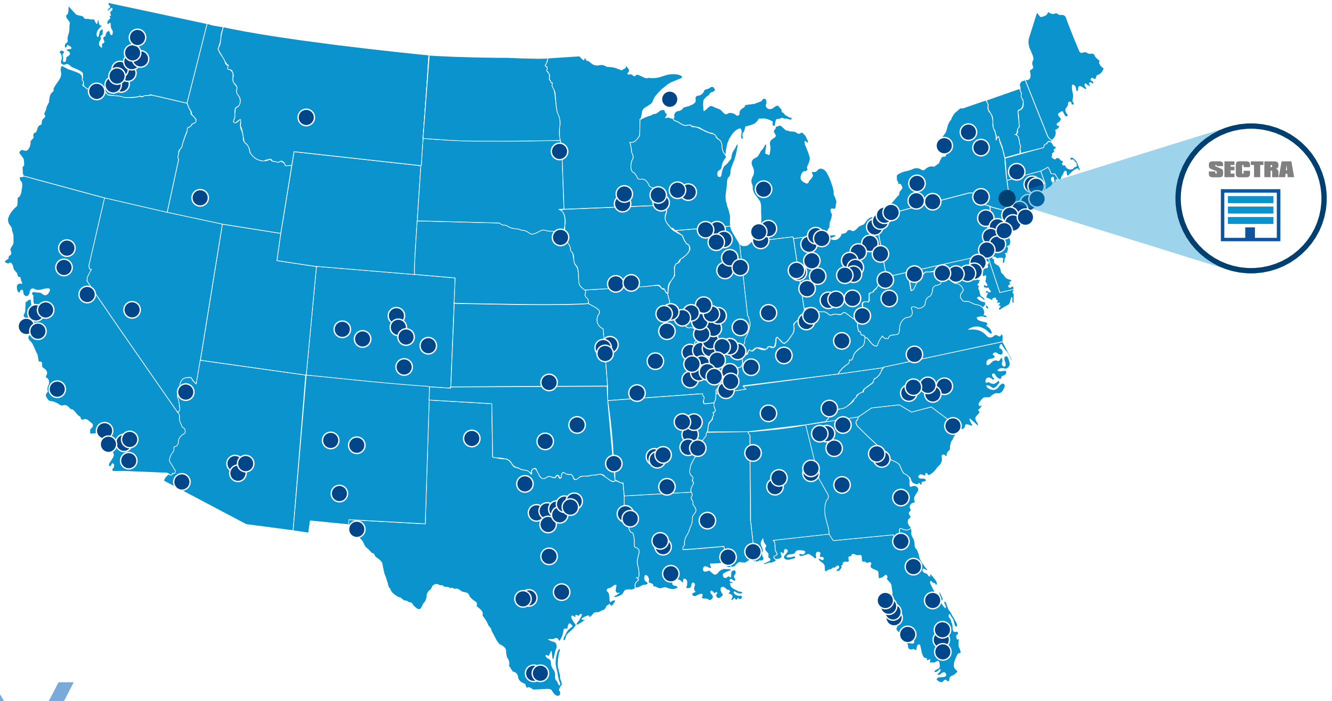
Installations

~90,000,000

Contracted Imaging Exams Per Year

8% → 12%

Market Share → Market Share



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100
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Specific needs and pain points for US customers

Consolidating many systems into one	- Migration complexity - Workflow standardization - Change Management+++
Stakeholders across large geographies	- Train the trainers - Customer resources have heavy load
Cost containment	- Looking to shorten the stack to reduce costs

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The Sectra One Journey:
A **true** SaaS vendor

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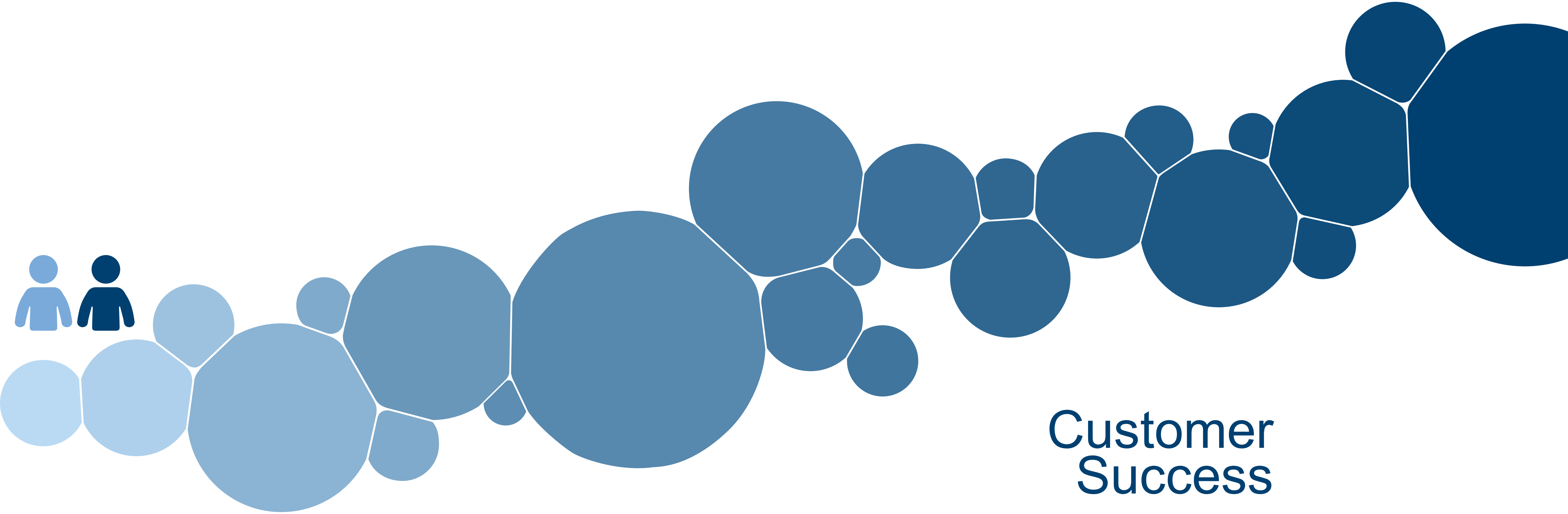
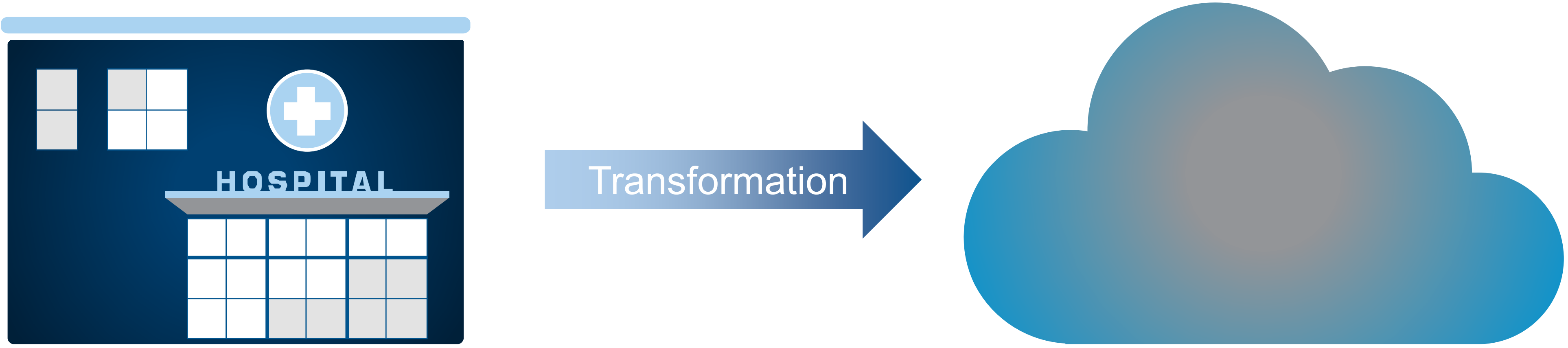
Sectra One - Customer Journey



Customer Success

Transition

Transitioning to SaaS (Software as a Service)



IT-solutions on-premises

A True SaaS user experience

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Where do we go from here?

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Knowledge and passion

Customer interview:

Dr Dan Navarro
Chief of Imaging Informatics
at Kaiser Permanente

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Q&A

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The way forward and final remarks

Torbjörn Kronander

What we hear from customers

- » We lack medical staff and our workload is increasing
  - » Burn out risk is real
  - » Workflow efficiency is paramount
- » ”We have too many IT systems”
  - » Cost is huge based on Maintenance, Training and Interfaces
  - » But it also gives cybersecurity concerns
- » And lately; Integrated diagnostics leading to optimized personalized medicine.
  - » Future AI and diagnoses will use data from different areas; EMR, Lab, Radiology, Pathology, Genomics…
  - » Tumour boards need efficient tools

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2024

Radiology Cardiology

Pathology ❤️ Genomics

Ophthalmology Dermatology

» The only vendor with all of these in one single system
» Creating opportunity for true Integrated Diagnostics
» Saving cost and time to treatment!
» Decreasing cybersecurity risks
» ”The Microsoft office” in medical imaging

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Summing up

PACS will gradually morph into Pixel EMR (Enterprise Imaging)

Which will then become Enterprise Integrated diagnostics

Which is absolutely required for Precision medicine

AI will be used more than only for image detection.

AI ("LLMs") based on foundation models will be omnipresent.

Likely the largest change in medicine since Semmelweis or Fleming.

This does NOT mean Sectra will abandon Radiology and Pathology.

These will continue as before, with the user in the center.

But we will widen the scope

And we will concentrate on the output and thus building value for our customers.
I.e. our customer’s customers.

We will still focus to be the best in each "ology"

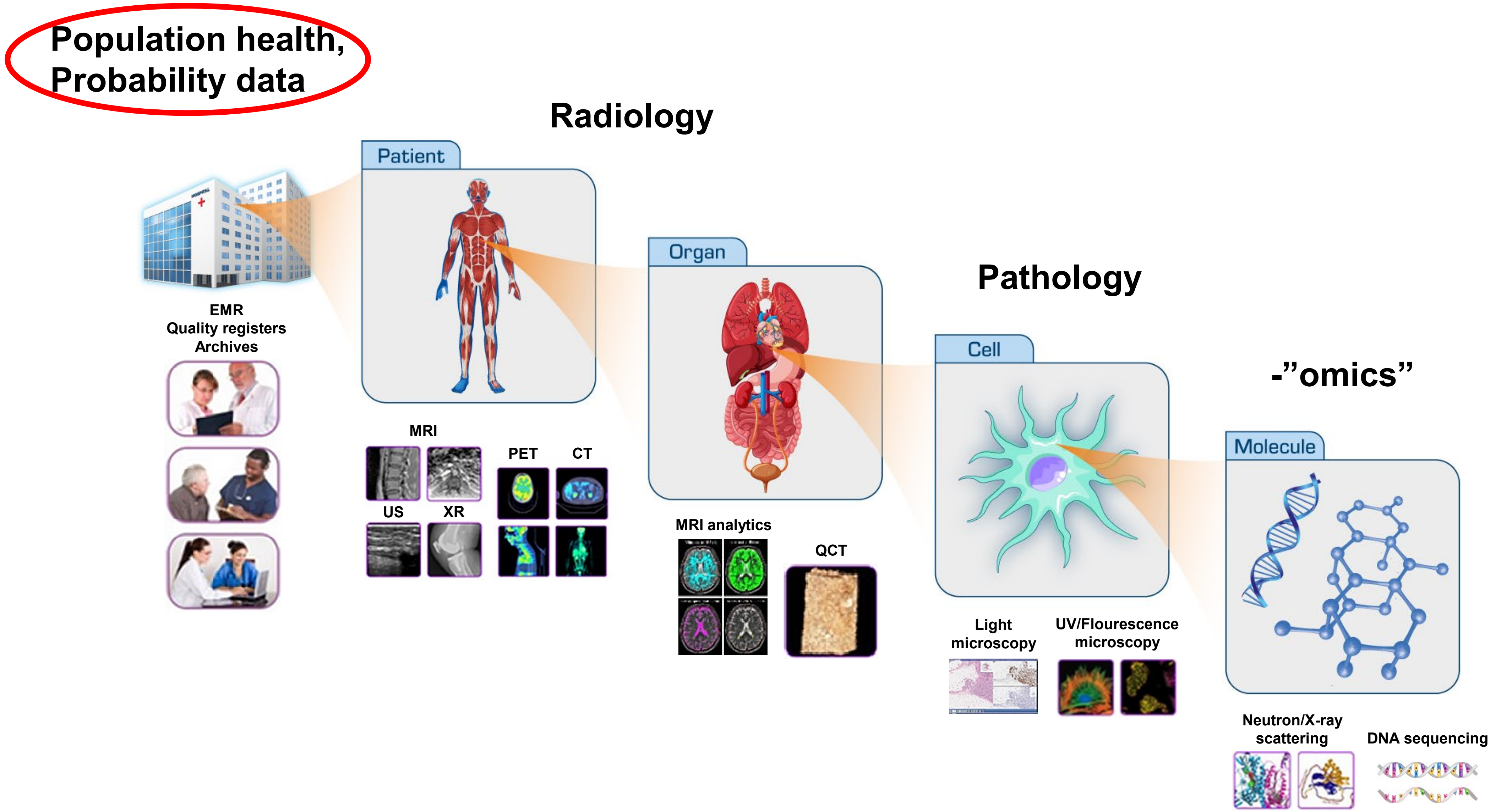
But we will be there with our customers when the future comes

With fewer IT systems

Improving

- Diagnostic efficiency
- Quality of diagnosis
- Cybersecurity

Building the toolbox for Integrated Diagnostics



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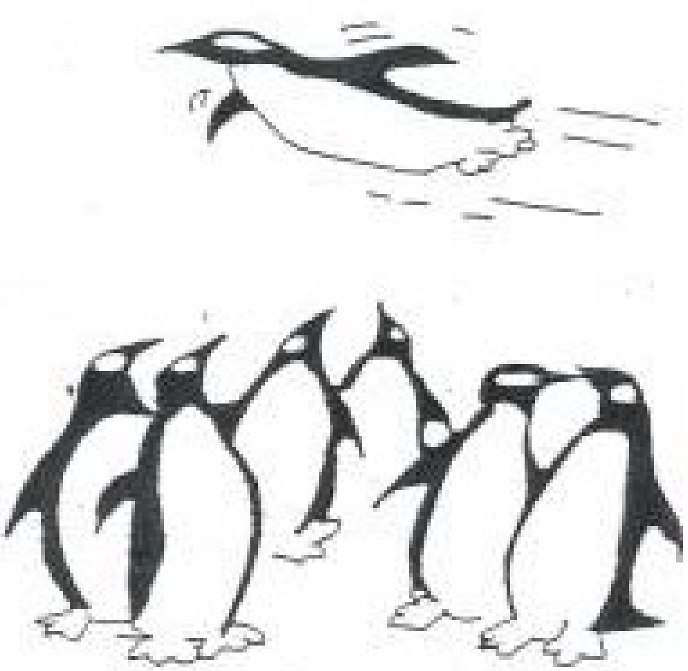
What would an old Sectra mentor say to a new employee?

At Sectra there is only a few things you need to remember:

- We do important things for important customers!
- Lives depend on **you**!
- Keep all promises
- We are a team!
- If you see a problem, you own it!



”We have told him it was impossible, but he wouldn´t listen”

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Your feedback is important!

Please let us know what you think.

Send an email to:

info.investor@sectra.com

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Questions?

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Thank you for joining our CMD!

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Knowledge and passion