First nine months 2024
FINANCIAL RESULTS

7 NOVEMBER 2024

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2024 first nine months financial results - highlights

Operating revenue was €564.6 Mn in 9M 2024, a 5% decrease on 9M 2023, mainly due to: (i) lower revenues from the manufacture of the COVID-19 vaccine in comparison to 9M 2023, when ROVI had booked higher income related to the production of the "pandemic" COVID-19 vaccine; and, (ii) lower revenues related to the activities carried out to prepare the plant for production of the vaccine under the agreement with Moderna.

Positive evolution of Okedi® (Risperidone ISM®), sales of which were 126% of those for 9M 2023, totalling €20.3 Mn.

Sales of the heparin franchise decreased by 2% to €177.8 Mn in 9M 2024 mainly due to lower orders from enoxaparin partners. However, ROVI expects Q4 2024 to be the strongest quarter of the year in terms of enoxaparin sales, as a higher volume of orders from partners is anticipated.

Good performance of Neparvis®, sales of which increased by 13%, in 9M 2024 compared to 9M 2023, rising to €38.1 Mn.

Gross margin was 63.6% in 9M 2024, an increase of 4.7 pp on 9M 2023. This increase was mainly due to: (i) the decrease in the contribution to the manufacturing business (CDMO) of revenue relating to activities to prepare the plant to produce medicines under the agreement with Moderna, which contributed lower margins to Group sales; (ii) the increased contribution to the CDMO business by existing customers (excluding Moderna), which contributed higher margins; and (iii) the increased contribution of sales of Okedi®, which likewise added higher margins.

EBITDA margin increased 0.8 p.p. to 29.6% in 9M 2024 from 28.8% in 9M 2023.

In 2024, ROVI expects its operating revenue to decrease by a mid-single-digit percentage in comparison with 2023.

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Conclusion of the strategic review, execution of the share capital reduction and Risvan®

ROVI completes the strategic review of its CDMO business

- In October 2024, after the assessment of strategic alternatives for its assets including a potential corporate transaction of ROVI relating to its third party contract development and manufacturing business, ROVI concluded that, given the strength, momentum and prospects of this business, the best way to maximize value for shareholders at this time is to continue executing the Company's standalone strategic plan, with the interest of the CDMO business best served and developed under the current ROVI group structure, with no entry of third-party investors.

ROVI executes the share capital reduction approved by the 2024 Ordinary General Meeting

- ROVI informed that the cancelled shares had been delisted from the Stock-Exchange Interconnection System (*Sistema de Interconexión Bursátil*) and the Madrid, Barcelona, Bilbao and Valencia Stock Exchanges effective 13 September 2024. As a result, the share capital of the Company is now an amount of EUR 3,074,145.72, divided into 51,235,762 ordinary shares, with a nominal value of EUR 0.06 each, which grant a total of 51,235,762 voting rights (one per share). By redeeming these shares, the shareholders automatically increase their percentage interest in the share capital.

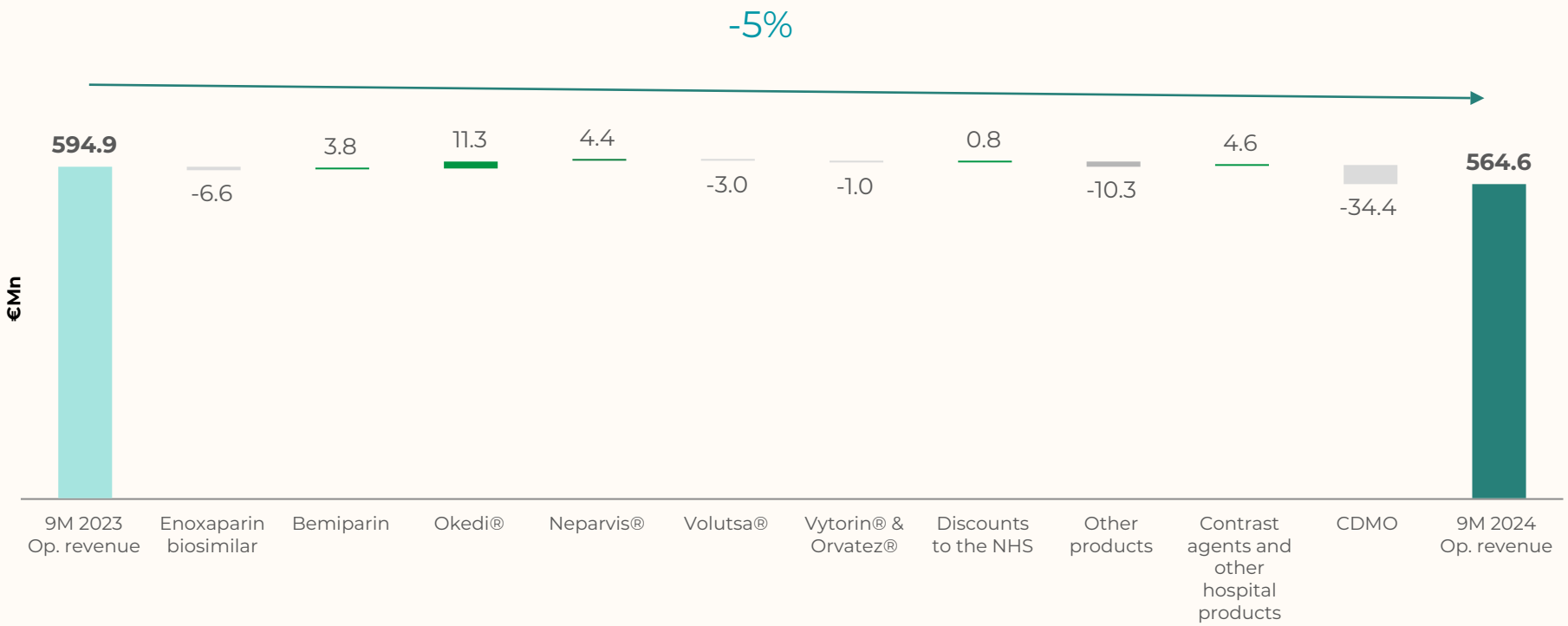
ROVI announces that Risvan® will not be marketed in the U.S.

- ROVI announces that Risvan® (Risperidone ISM®), a product indicated for the treatment of schizophrenia in adults, will not be marketed in the United States, following an assessment of the uncertainties and opportunities associated to this launch. ROVI has, therefore, chosen to focus on the European development of Okedi® and expects this product to reach potential global sales of between 100 and 200 million euros in upcoming years.

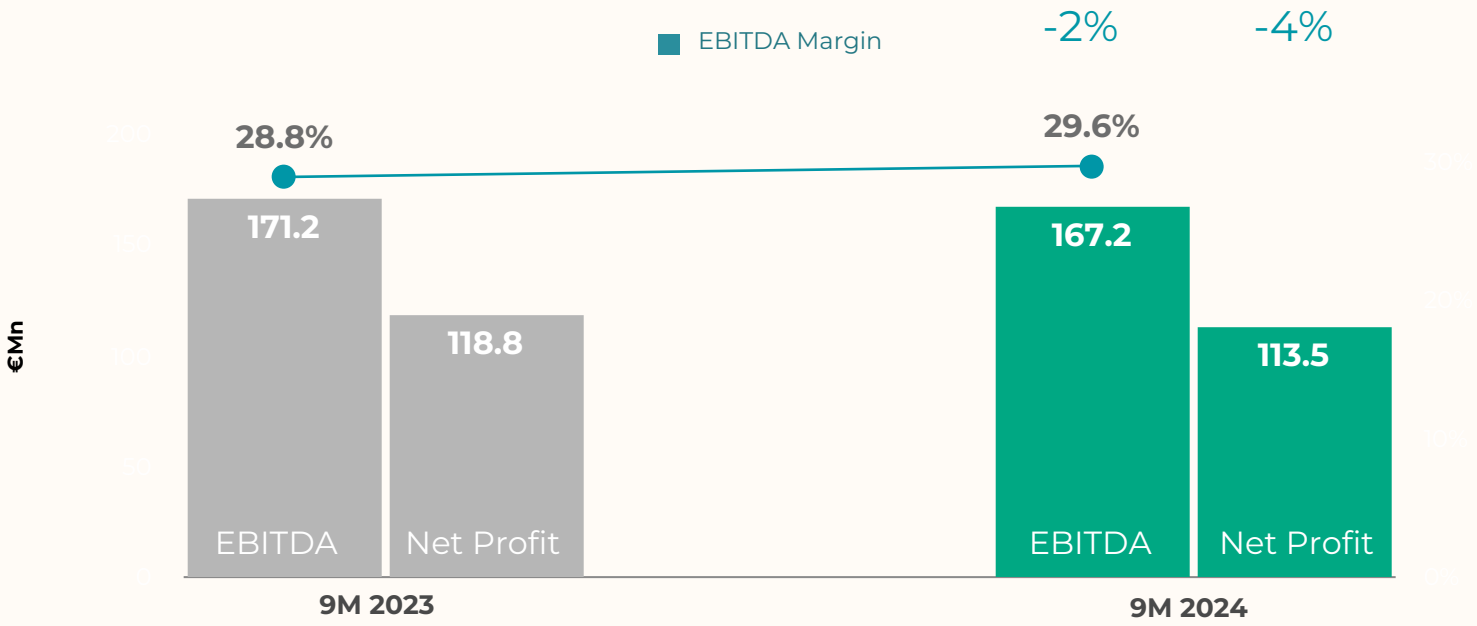
OPERATING RESULTS

Okedi®, Neparvis®, Bemiparin and the contrast agents and other hospital products division, strategic products within the specialty pharma business

9M 2024 operating revenue variation



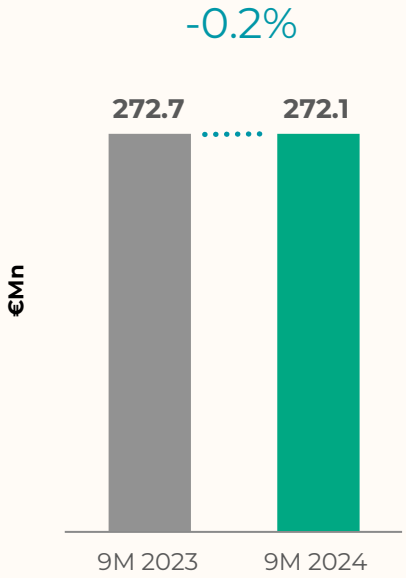
Evolution of EBITDA and net profit in the first nine months of a transition year



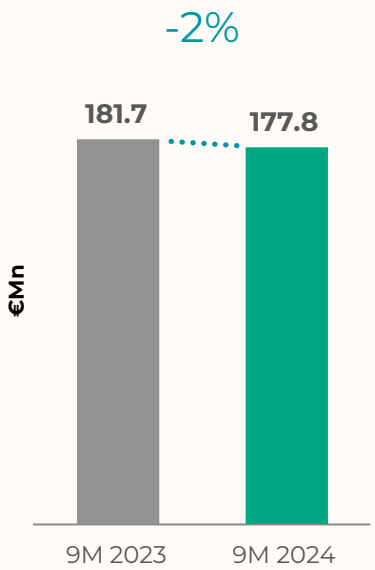
- EBITDA was €167.2 Mn in 9M 2024, a decrease of 2% compared to 9M 2023.
  - EBITDA margin increased 0.8 pp to 29.6% in 9M 2024 from 28.8% in 9M 2023.
- Net profit decreased by 4%, from €118.8 Mn in 9M 2023 to €113.5 Mn in 9M 2024.

ROVI aspires to become a benchmark player in the LMWH field worldwide

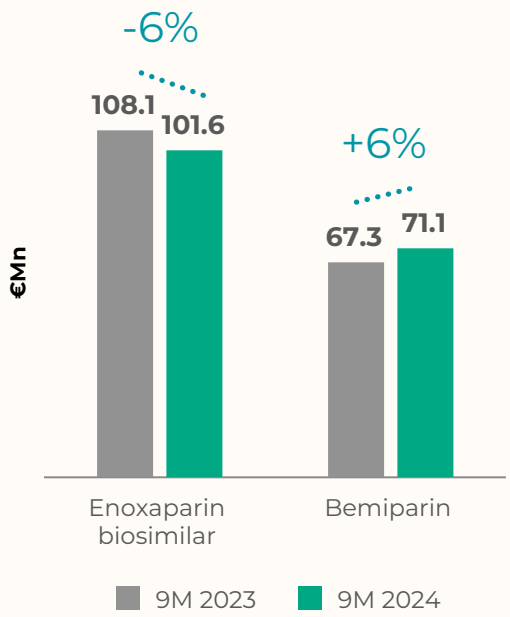
Prescription-based sales



Heparin franchise sales



LMWH sales

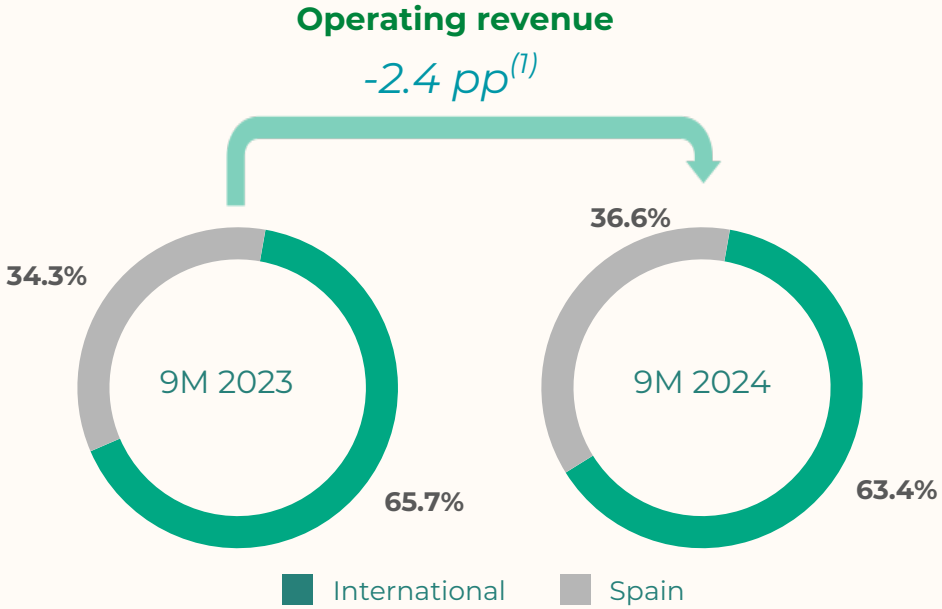


- Sales of prescription-based pharmaceutical products remained stable at €272.1 Mn in 9M 2024 in comparison to 9M 2023.
- Sales of the heparin franchise[1] decreased by 2% to €177.8 Mn in 9M 2024 mainly due to lower orders from enoxaparin partners. However, ROVI expects Q4 2024 to be the strongest quarter of the year in terms of enoxaparin sales, as a higher volume of orders from partners is anticipated.
- Heparin sales represented 31% of operating revenue in 9M 2024 compared to 31% in 9M 2023.

(1) Heparin franchise includes low molecular weigth heparins and other heparins. Other heparins are reported in the "Contrast agents and other hospital products" line.

ROVI's internationalisation strategy as one of its pillars of future growth

- Well positioned to drive long-term leadership in low-molecular-weight heparins (LMWH).
- Sales outside Spain decreased 9% in 9M 2024 mainly due to the decrease in sales from the CDMO business.
- Sales outside Spain represented 63% of operating revenue in 9M 2024, compared to 66% in 9M 2023.



(1) Variation in international sales between 9M 2023 and 9M 2024 in percentage points.

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Growth evolution of Enoxaparin Biosimilar (Becat®)

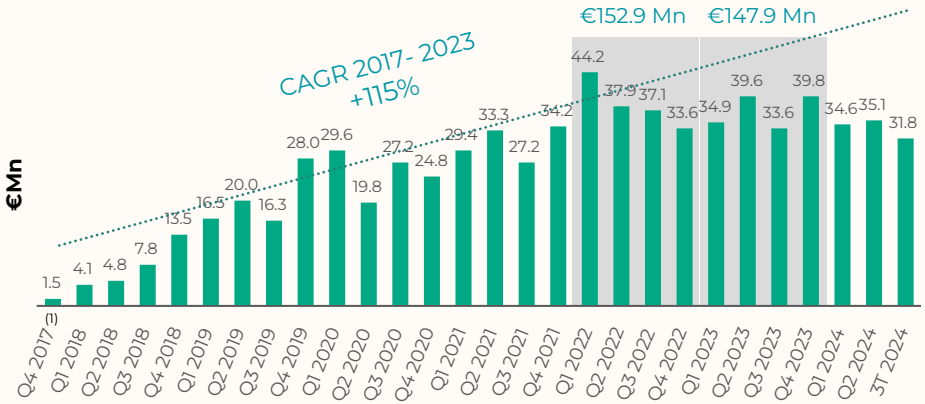
Well-established network to minimize time-to-market

Direct marketed in **Germany, UK, Italy, France, Poland, Austria, Belgium, Portugal and Spain**

Approved in **26 countries in Europe** and 33 **in the Rest of the World**

Launched in 40 **countries**

Enoxaparin biosimilar Becat® Sales Ramp-up



Commercial Strategy

...the largest enoxaparin market with **€1.3bn** sales[2]

ROVI markets enoxaparin biosimilar Becat® directly in 9 European countries...

...which account for c.75% of the European market[3]

In the long-term, biosimilars tend to reach a...

50-70% Market Share[4]

...of the reference product market

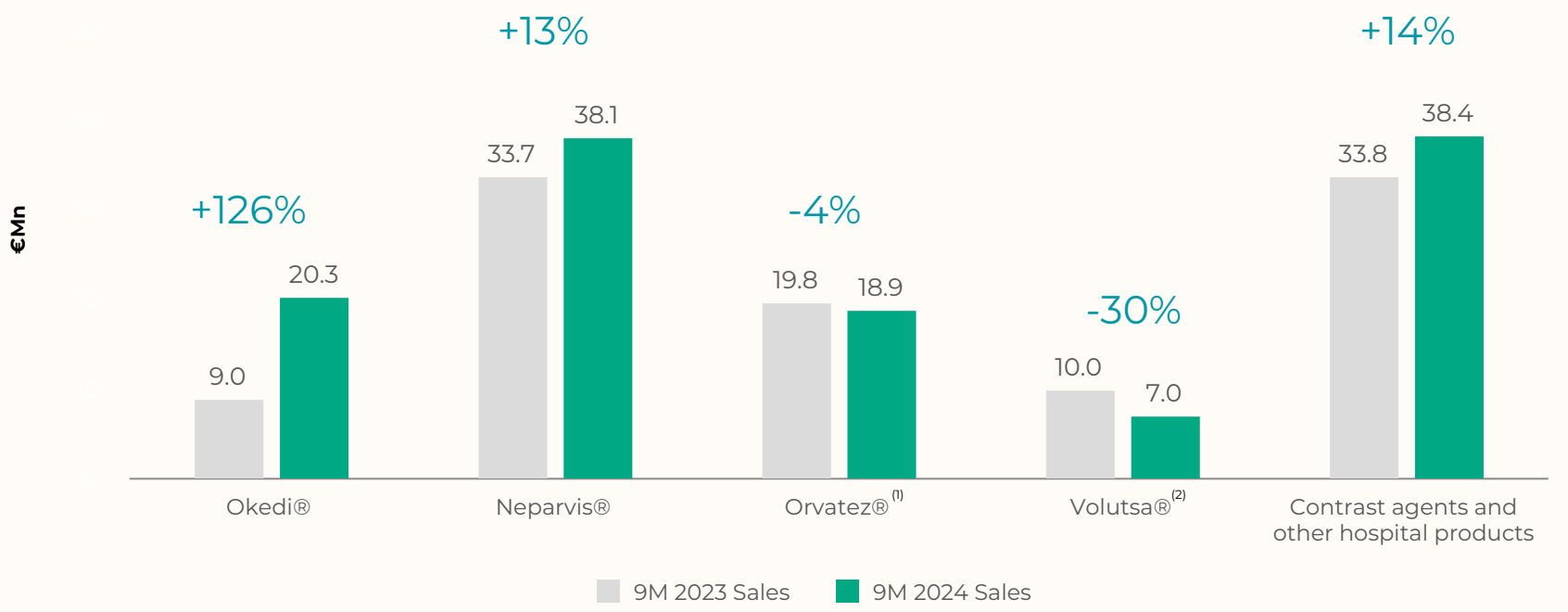
ROVI launched its Enoxaparin biosimilar in Jordan and Sri Lanka in 2023.

It will continue international expansion in other markets with strong growth potential through out-licensing agreements.

€0.7 bn
Q1 2020 MAT Market Sales[2]

(1) Becat® 4Q 2017 sales include sales throughout September. As the product was launched that month, sales were negligible.
(2) IQVIA MIDAS Q1 2020
(3) QuintilesIMS, 2015.
(4) Technavio 2016 biosimilars report.

Okedi®, Neparvis® and contrast agents and other hospital products, key drivers of the performance of the specialty pharma business



(1) Decrease in sales was mostly caused by the entry of generics into the market, which has resulted in a product price reduction by competitors. ROVI consequently dropped the price of Orvatez® by 40% in October 2024.
(2) Volutsa® price decreased by 47% in Q2 2023.

Value added CDMO services

CDMO business

ROVI and Moderna continue along the path of their long-term collaboration:

- ROVI collaborates with Moderna in the end-to-end supply chain, including the active substance at the Granada plant and fill-and-finish at the Madrid facilities. For the latter, Moderna and ROVI signed a 10-year agreement to take part in the production of Moderna's pipeline program for the new generation of COVID-19 vaccines, as well as mRNA vaccines against RSV[1] and influenza.
- ROVI's Madrid facilities were inspected and approved by the FDA in Q3 2023 and in Q2 2024, which has allowed it to support the 2023 and 2024 COVID-19 Moderna vaccination campaign in the U.S. ROVI's Granada facility was approved by the FDA in 2024, allowing Moderna to market the vaccine manufactured by ROVI in the U.S.

ROVI through its subsidiary ROIS entered an agreement to support the manufacture of PFS for a global pharmaceutical company. ROIS will provide a high-speed production line at the ROIS' San Sebastián de los Reyes facility in Madrid, with an estimated annual capacity of 100 million units.

New capacities for our plants

ROVI San Sebastián de los Reyes	– The first high-speed PFS filling line (36,000 syr/h) has already been installed and qualified. The FDA has inspected and approved the line (No Action Indicated) to produce the mRNA COVID vaccine in July 2024 – The second of the lines (isolator technology-36,000 syringes/h) was installed in August 2024, is undergoing qualification, and will be used to meet the demand stipulated in the aforementioned agreement with a global pharmaceutical company – The third high-speed filling line will be installed in Q2 2026 with capacity to manufacture PFS or cartridges
ROVI Alcalá de Henares	– Four direct PFS cartoning packaging lines (24,000 syr/h) have been installed. Two of them are qualified and are in operation to cover US seasonal COVID vaccine. The other two have been installed in a new production building at the same plant – In 2026 and 2027, two assembly lines will be installed with pens and autoinjectors capacity
Madrid	– A new line will be installed in Q1 2025 with a capacity to manufacture PFS or cartridges
Granada	– In Q3 2024, a project to increase the capacity of Lipid Nanoparticles manufacturing for Moderna was finished

CDMO evolution

CDMO sales decreased by 12% to €253.2 Mn in 9M 2024 as a result of:

- lower revenues from the manufacture of the COVID-19 vaccine in comparison to 9M 2023, when ROVI had booked higher income related to the production of the "pandemic" COVID-19 vaccine; and,
- lower revenues related to the activities carried out to prepare the plant for the production of the vaccine under the agreement with Moderna.

However, CDMO sales increased by 16% to 134.4 million euros in Q3 2024 compared to Q3 2023, as a result of (i) higher revenue from existing customers (excl. Moderna); and (ii) higher revenue related to production of the COVID-19 vaccine due to a more concentrated seasonality in Q3 2024. It should likewise be noted that Q3 2024 is expected to be the strongest of the year in terms of CDMO sales performance.

(1) Respiratory syncytial virus

ISM® Platform opens up new avenues of growth for ROVI

Overview

- Internally-developed and patented innovative drug-release technology, ISM®[1], which allows for the sustained release of compounds administered by injection
- Based on two separate syringes containing, respectively, (i) the drug and polymer (solid state) and (ii) the solvent (liquid state)
- Potential wide applicability of ISM® technology to new chronic therapeutic areas, including psychiatry and oncology
- 505(b)(2) path of approval for candidates leveraging ISM® technology

Product	Potential Indication	Current Situation	Key Milestones
Risperidone-ISM®, monthly	**Schizophrenia**	Aproved	Marketed in Europe and approved in USA, Canada & Australia Phase I: Superior oestrogen suppression vs Femara®
Letrozole ISM®, annual	**Breast Cancer**	Clinical development on hold	
Letrozole LEBE, quarterly	**Breast Cancer**	Phase I	
Risperidone, quarterly	**Schizophrenia**	Phase I	

Concentrated on improving posology for already approved compounds, which benefits risk / reward profile

Multiple FDA / GMP approved facilities to support the platform

Key Company Highlights of ISM® Platform

1	**Predictability**	Pop PK[2] model & simulations already validated for Risperidone-ISM® in Phase I & II Clinical Program	Expected high success rate in Phase III in new developments
2	**Usability**	Improved stability	No cold chain needed
3	**Flexibility**	Selecting the most convenient posology depending on clinical needs	From 1 to 12 months administration
4	**Improved Clinical Management**	Long-acting injection (1-12 months) plasma therapeutic levels from day 1	Rapid onset & sustained clinical effect
5	**Vertical Integration**	Technological barriers (e.g. power filling) Strong IP Manufacturing capabilities	Protected technology Fully integrated manufacturing plants

(1) ISM® stands for *In Situ Microimplants.*
(2) PK stands for pharmacokinetic

Outlook 2025

2025 operating revenue growth rate

Decrease by a mid-single-digit percentage vs 2024

The key growth levers in 2025

Specialty Pharma	CDMO
Marketing of Okedi® in Europe	New customers to be acquired
Launch of Risperidone ISM® in new countries	Agreement with Moderna
LMWH franchise	Capacity increase
License agreements (Neparvis®)	
Existing portfolio of specialty pharmaceuticals	
New product distribution licenses	

FINANCIAL RESULTS

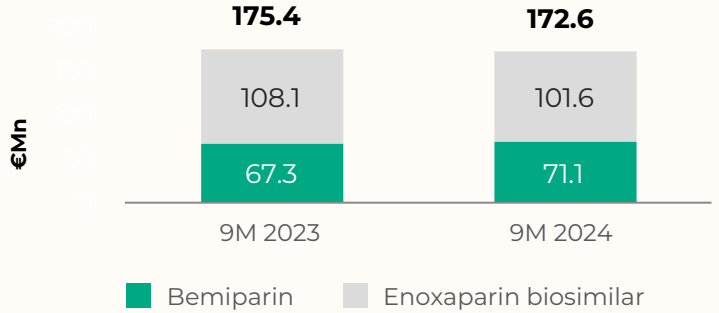
Revenue level affected by the performance of the CDMO business

Operating revenue

-5%

LMWH sales

-2%



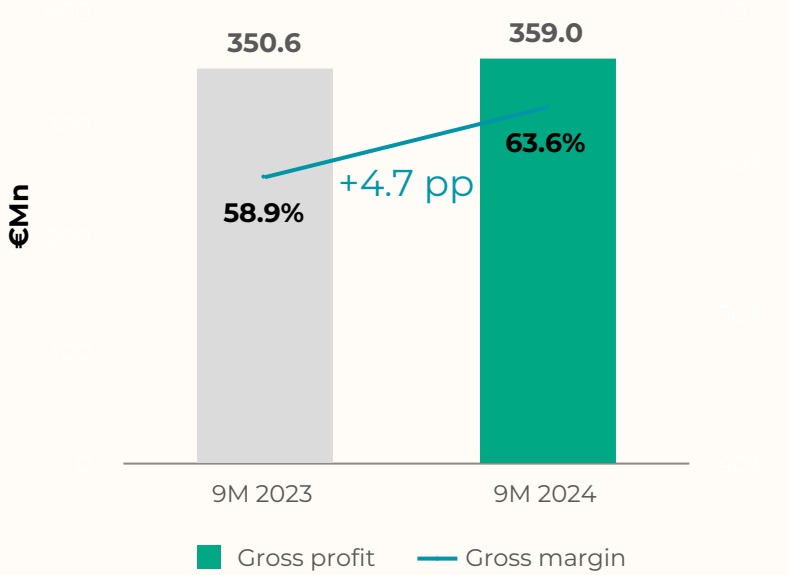
Operating revenue decreased 5% to €564.6 Mn in 9M 2024 mainly due to the performance of the CDMO business. This division generated (i) lower revenues from the manufacture of the COVID-19 vaccine in comparison to 9M 2023, when ROVI had booked higher income related to the production of the "pandemic" COVID-19 vaccine; and, (ii) lower revenues related to the activities carried out to prepare the plant for the production of the vaccine under the agreement with Moderna. However, CDMO sales increased by 16% to 134.4 million euros in Q3 2024 compared to Q3 2023, as a result of (i) higher revenue from existing customers (excl. Moderna); and (ii) higher revenue related to production of the COVID-19 vaccine due to a more concentrated seasonality in Q3 2024. It should likewise be noted that Q3 2024 is expected to be the strongest of the year in terms of CDMO sales performance.

Sales of LMWH decreased by 2% to €172.6 Mn in 9M 2024.

- **Enoxaparin** biosimilar sales decreased by 6% to €101.6 Mn in 9M 2024.
  - This decrease was mainly due to lower orders from partners in 9M 2024. However, ROVI expects Q4 2024 to be the strongest quarter of the year in terms of enoxaparin sales, as a higher volume of orders from partners is anticipated.
- **Bemiparin** sales increased by 6% to €71.1 Mn mainly linked to higher orders from partners in China, Turkey and Greece.
  - ROVI expects full year sales of bemiparin to increase by a low-single-digit percentage in 2024 compared to 2023.

Gross margin positively impacted by the CDMO division and the increased contribution of sales of Okedi®

Gross profit and Gross margin



Gross margin impacts

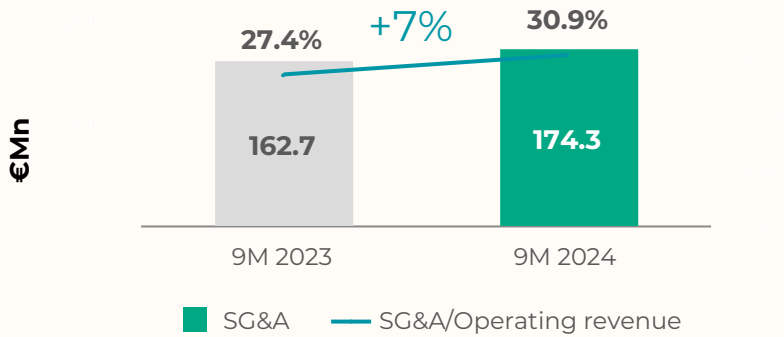
Gross profit increased 2% to €359.0 Mn in 9M 2024.

Gross margin was 63.6% in 9M 2024, an increase of 4.7 pp on 9M 2023. This increase was mainly due to: (i) the decrease in the contribution to the manufacturing business (CDMO) of revenue relating to activities to prepare the plant to produce medicines under the agreement with Moderna, which contributed lower margins to Group sales; (ii) the increased contribution to the CDMO business by existing customers (excluding Moderna), which contributed higher margins; and (iii) the increased contribution of sales of Okedi®, which added higher margins.

In 9M 2024, low-molecular-weight heparin (LMWH) raw material prices decreased by around 55% in comparison with 9M 2023. ROVI expects this decrease in LMWH raw material prices to be confirmed in 2024. Notwithstanding, in spite of the decrease in LMWH raw material prices, the impact on the gross margin was negative in 9M 2024,. However, a positive impact on the gross margin is expected from 2025 onwards.

SG&A and commitment to R&D

SG&A expenses



R&D expenses

SG&A expenses increased by 7% at €174.3 Mn in 9M 2024:

- **Employee benefit expenses (exc. R&D)** increased 8% in 9M 2024 versus 9M 2023 mainly due to a 10.3% wage increase under the General Collective Agreement for the Chemical Industry; and
- **Other operating expenses (exc. R&D)** increased by 6% to €84.3 Mn in 9M 2024 versus 9M 2023 as a result of Okedi®'s launch in Europe, and expenses related to the strategic assessment. Nevertheless, "Other operating expenses (excl. R&D and strategic assessment") slightly increased by 2% to 80.7 million euros due to an efficient cost containment policy.

Additionally, in Q4 2024, "Employee benefit expenses (excl. R&D)" are expected to increase due to the signing of the pre-agreement of the XXI Collective Agreement of the Chemical Industry[1].

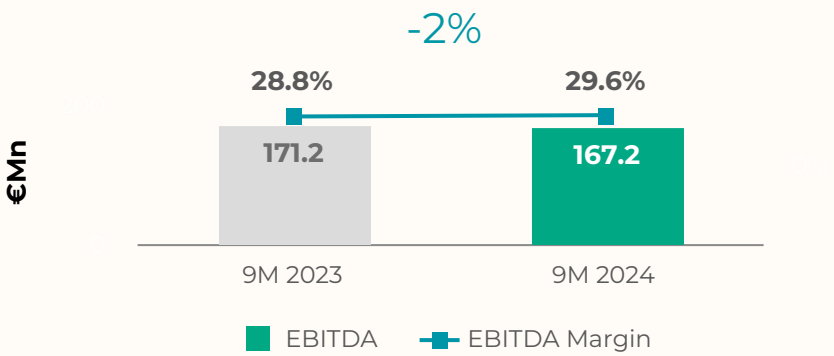
R&D expenses increased 5% to €17.4 Mn in 9M 2024. These expenses are related to:

- the development of the phase I of Letrozole LEBE, which began in July 2023; and
- the development of the phase I of a new formulation of Risperidone ISM® for a 3-monthly injection, which began in September 2023.

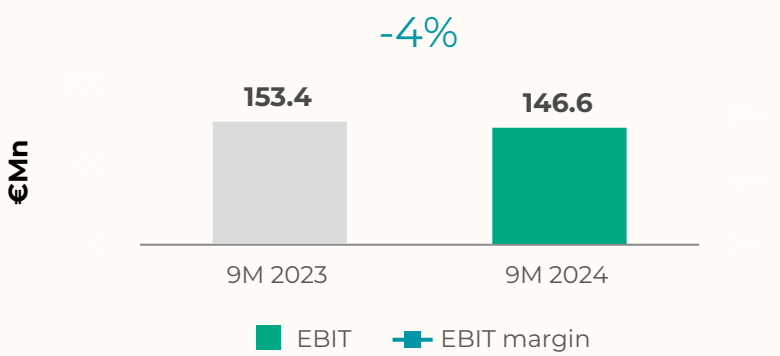
(1) Source: https://www.feique.org/wp-content/uploads/2024/10/Acta-Preacuerdo-XXI-CGIQ.pdf

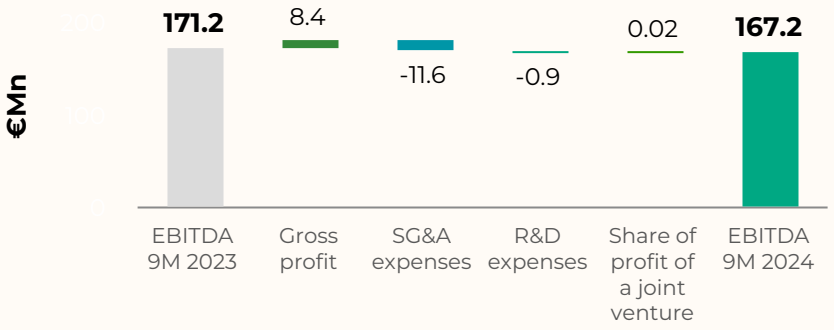
EBITDA, EBIT & Net Profit analysis

EBITDA

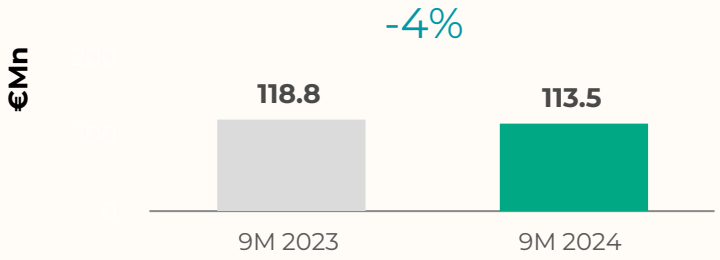


EBIT

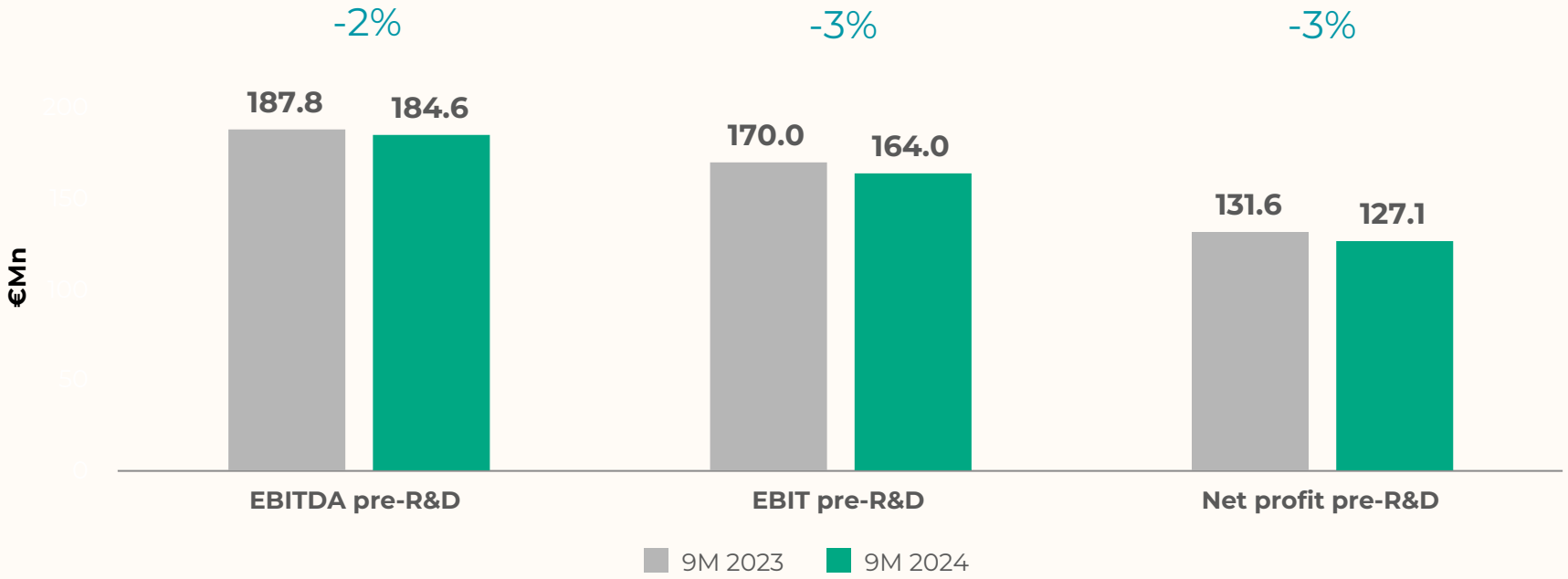




Net Profit



PRE-R&D analysis[1]



- **EBITDA "pre-R&D"** decreased by 2%, from €187.8 Mn in 9M 2023 to €184.6 Mn in 9M 2024.
- **EBIT "pre-R&D"** decreased by 3%, from €170.0 Mn in 9M 2023 to €164.0 Mn in 9M 2024.
- **Net profit "pre R&D"** decreased by 3%, from €131.6 Mn in 9M 2023 to €127.1 Mn in 9M 2024.

(1) EBITDA, EBIT and Net profit "pre-R&D" calculated excluding R&D expenses in 9M 2024 and 9M 2023.
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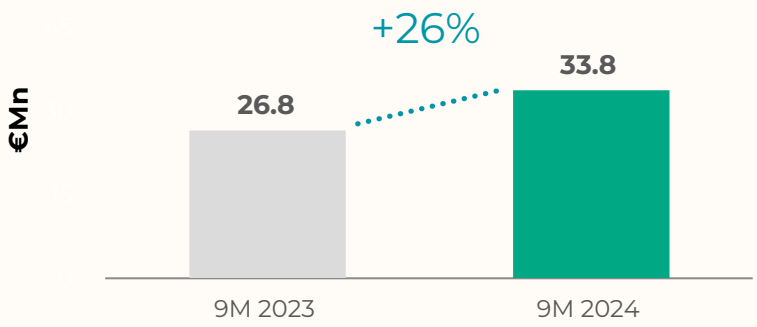
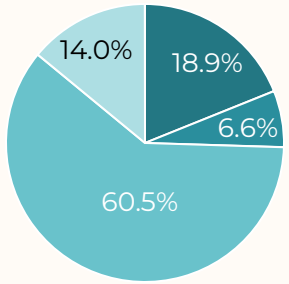
Capital expenditure and Cash Flow

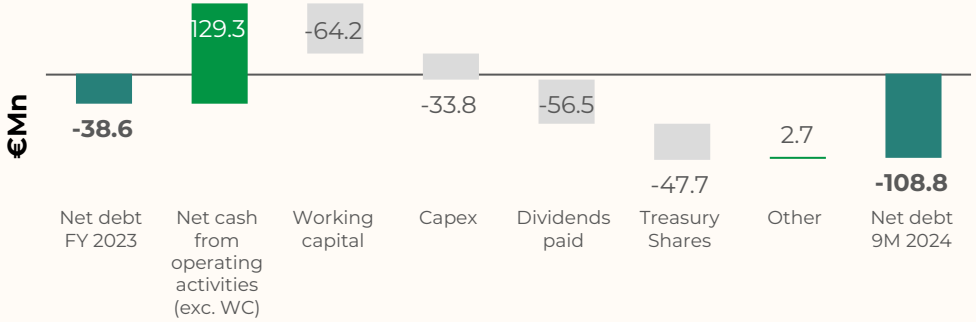
CAPEX evolution





- Maintenance Capex
- ISM industrialisation
- New filling lines and operations expansion
- Glicopepton

Cash Flow evolution



CF from operating activities increased to €65.2 Mn in 9M 2024 mainly due to:

- the decrease of €4.3 Mn in the "Inventory" item in 9M 2024 compared to a decrease of €53.3 Mn in 9M 2023;
- the decrease of €36.4 Mn in the "Trade and other payables" item in 9M 2024, compared to a decrease of €52.1 Mn in 9M 2023; and
- the booking of €(24.4) Mn under the "Cash flow from contract manufacturing services" caption in 9M 2024 mainly due to the allocation of more revenue to the income statement than payments received, compared to the €(39.4) Mn recognized in the same period of 2023.

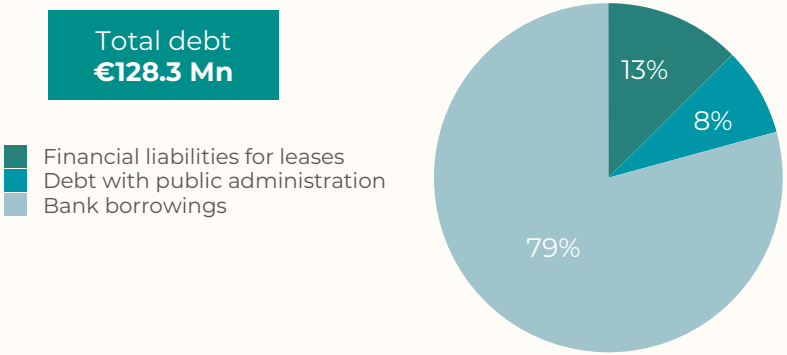
ROVI **invested €33.8 Mn** in 9M 2024 and the main investments projects are:

- ISM® Industralization
- New filling lines and operations expansion
- Glicopepton

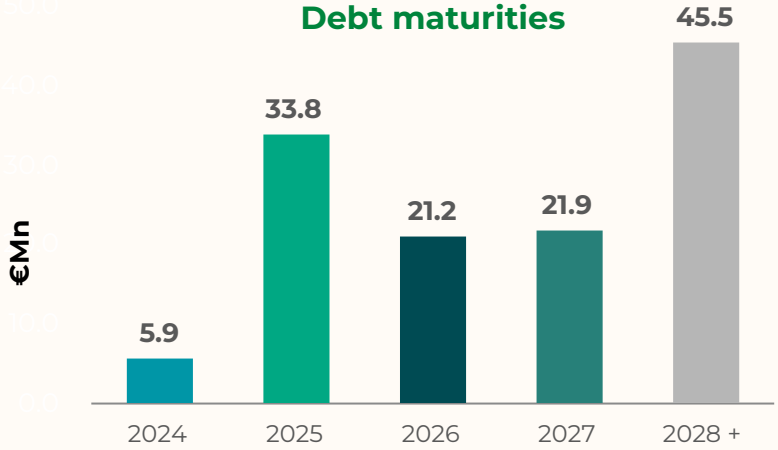
Debt analysis

Debt breakdown by source (%)

Total debt
€128.3 Mn



Debt maturities



- **Debt** with **public** administration represented **8% of total debt, with 0% interest rate.**
- **Net debt of €108.8 Mn** as of 30 September 2024 vs net debt of €38.6 Mn as of 31 December 2023.
- As of 30 September 2024, ROVI had drawn €10 Mn against the new credit granted by the EIB in July 2022 at a variable rate of Euribor at 3 months + 0.655% (the interest rate for the first repayment is 4.343%). No further drawdowns will be made against this credit line since the two-year drawdown period has ended.
- Additionally, ROVI has signed three credit policies: one in September 2023 for €20 Mn and another in March 2024 for €20 Mn, both with conditions of Euribor 3 months + 0.50%. In June 2024, a third policy was signed, also for €20 Mn, at Euribor 3 months + 0.65%, as well as two loans of €25 Mn each at fixed rates of 3% and 3.49%, respectively. As of 30 September 2024, ROVI had drawn down €11 Mn against the total of all the credit lines.
- ROVI's General Shareholders' Meeting, held on June 24th 2024, approved the payment of a gross **dividend** of 1,1037 euros per share charged to the 2023 profit and retained earnings. This dividend represents 35% of the net profit for 2023 attributed to the parent company. This dividend was paid on 10 July 2024.

Completion of the Share Buyback Program and share capital reduction

Purpose and scope

To redeem own shares of ROVI (share capital reduction) while, at the same time, boost the remuneration of the ROVI shareholder by increasing the profit per share

Duration

26 July 2023 for a **twelve-month period**

Maximum monetary amount

Up to **130,000,000** euros

Maximum number of shares to be acquired

2,700,000 shares of the Company, representing approximately **5%** of the Company's share capital on 26 July 2023

On 11 June 2024, ROVI had executed the buy-back program, having acquired 2,233,466 shares for an amount of €130.0 Mn.

On 13 September 2024, (i) the shares acquired under the Buy-Back Programme, and (ii) 546,929 of the existing treasury shares were delisted from the Stock-Exchange Interconnection System (*Sistema de Interconexión Bursátil*) and on the Madrid, Barcelona, Bilbao and Valencia Stock Exchanges.

News flow 2024-2025

Specialty pharma	Sales of biosimilar of enoxaparin
	Additional new products to be launched
	Granting by the competent local authorities of the marketing authorisation of an enoxaparin biosimilar outside Europe
CDMO	Evolution of Moderna's products manufacturing Announcement of new contracts Expansion of current production capacities
ISM® technology platform	Marketing of Okedi® in Europe, Canada, Australia and other countries
	Phase I clinical development of a new three-monthly formulation of letrozole (Letrozole LEBE)
	Phase I clinical development of Risperidone for a 3-monthly injection

Alternative performance measures

In addition to the financial information prepared in accordance with International Financial Reporting Standards ("IFRSs") taken from our financial statements, this document includes certain alternative performance measures ("APMs") as defined in the ESMA (European Securities and Markets Authority) Guidelines on Alternative Performance Measures of 5 October, 2015 (ESMA/2015/1415), as well as some non-IFRS financial indicators. The financial measures contained in this document that are considered APMs or non-IFRS financial indicators have been prepared on the basis of the ROVI Group's financial information but are not defined or set out in detail within the framework of the applicable financial information and have not been audited or reviewed by ROVI's auditors.

These APMs are considered figures that have been adjusted in respect of those that are presented in accordance with the International Financial Reporting Standards endorsed by the European Union (IFRS-EU), which form the applicable accounting framework for the consolidated financial statements of the ROVI Group. Therefore, the reader should consider them to complement the latter but not to replace them.

ROVI uses these APMs and non-IFRS financial indicators to plan, oversee and assess its performance. ROVI considers the APMs and non-IFRS financial indicators to be useful to allow the management team and investors to compare the past or future financial performance, the financial situation and the cash flows. Notwithstanding, these APMs and non-IFRS financial indicators are considered complementary and are not intended to replace IFRS measures. Furthermore, other companies, including some in ROVI's sector, may calculate such measures differently, which reduces their usefulness for comparative purposes.

To obtain further information on the alternative performance measures (APMs) and non-IFRS financial indicators used by ROVI, including the definition thereof and a reconciliation between the applicable management indicators and the financial information set out in the consolidated financial statements prepared under IFRSs, please consult the information included on this subject on Appendix 2 (pages 39-43) of the press release on the financial results for the first nine months of 2024. Said document is available on ROVI's website and may be accessed on the following link: (https://www.rovi.es/en/shareholders-investors/financial-business-information).

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