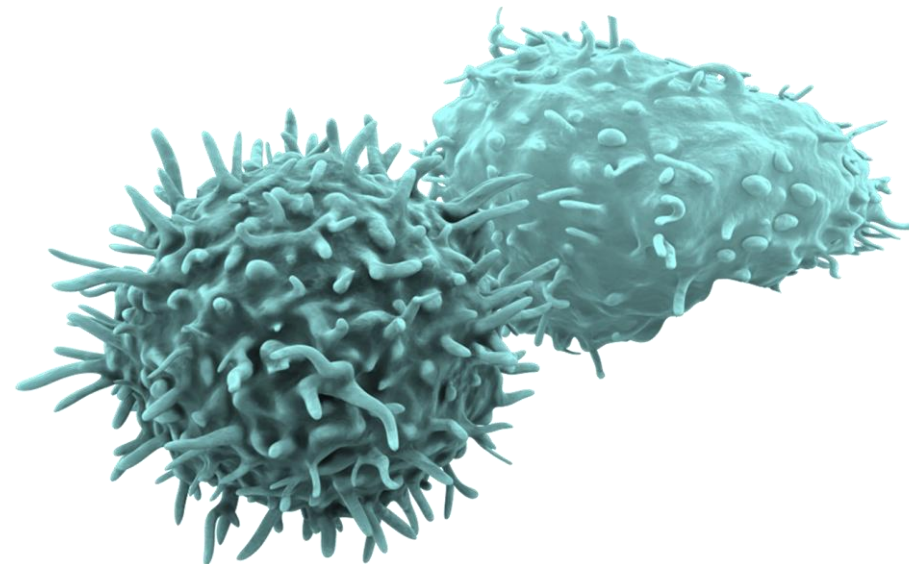


# Enabling precision medicine with a simple blood test

Investor Presentation – November 2025



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# Presenting today



**Peter Collins**  
CEO



**Dr. Jan Groen**  
Executive Chairman



**Sinead Armstrong, FCA**  
Finance Director



# Opportunity summary

*Driving the next generation of precision cancer diagnostics*



## Market Opportunity

- \$12.6b CTC market, projected to reach \$25b by 2030 (CAGR 12.2%)

## Clinical Need Now

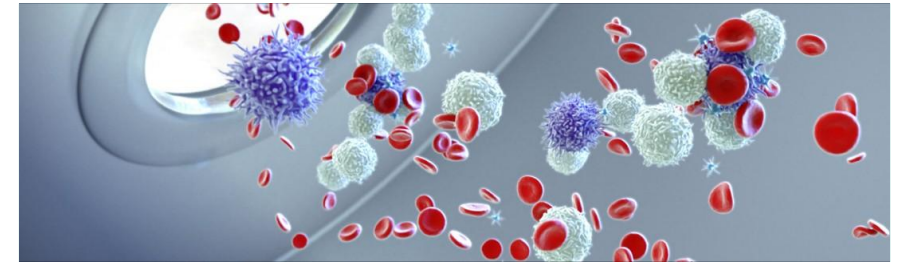
- Independent expert consensus confirms clinical relevance of CTCs and identifies the Parsortix platform as leading next-generation technology
- CTCs provide complementary and unique insights beyond ctDNA

## New Business Model

- Strategic shift from science to commercialisation
- Driven by partnering with lab service providers and strategic partnerships, leveraging existing product sales
- Innovative tests with high unmet clinical need with partners

## Qualified sales pipeline of £12.6m (2026-2027)

- Weighted pipeline of £4.5m (2026-2027)



## Strategic Highlights

- **New leadership team** with strong commercial and clinical experience
- **Focused strategy** to drive commercialisation and profitability
- **Restructure** and sole focus on revenue-generating projects

***Liquid biopsy is the cornerstone of next-generation cancer diagnostics, enabling a paradigm shift in cancer care***

# Summary of funding

- Successful fundraise of £6.8m gross announced 24 November 2025
- Strong support from our larger shareholders, with a number significantly increasing their positions
- Retail offer of up to £1m at an issue price of 1.0 pence per Ordinary Share
- GM - 2:00 pm on 15 December 2025
- Admission – 18 December 2025



# Cancer: a significant and growing global issue



**1 in 2**

diagnosed with cancer in their lifetime



**19 million**

new cancer cases p.a., with 49 million people living with cancer (5-year prevalence)



**65%**

growth in global cancer cases by 2050, with 31 million new cases p.a. by 2050



**\$25.2 trillion**

estimated global economic cost of cancer from 2020 to 2050, equivalent to an annual tax of 0.55% on global GDP



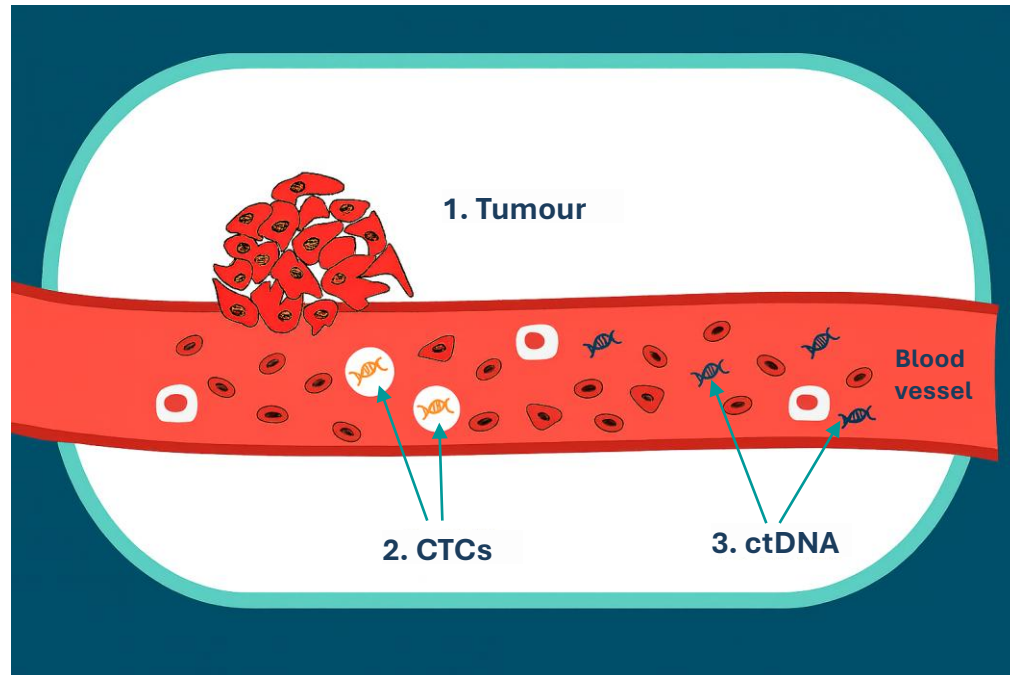
# Current care fails to address patient needs

- Tissue biopsies are the standard of care to confirm cancer diagnosis and identify patients for precision medicine
- They are painful, costly and unsuitable for repeated use
- Cancer evolves, making tissue biopsies quickly outdated for treatment decisions
- 2 in 3 cancer patients do not receive precision medicine
- Circulating tumour DNA (ctDNA) is not always found, and tests can leave gaps in cancer insight



**What is missing: a repeatable, real-time cancer test to enable patients to get the right treatment at the right time**

# CTCs overcome limitations of tissue biopsy and ctDNA



CTCs provide **additional clinical information** to ctDNA and insight when tissue or ctDNA is not available

## Tissue biopsy (1)

- Standard of care
- Cancer cells taken directly from the tumour
- Limited to the site of the biopsy
- Invasive procedure with risks. Unsuitable for repeat testing

## Liquid biopsy

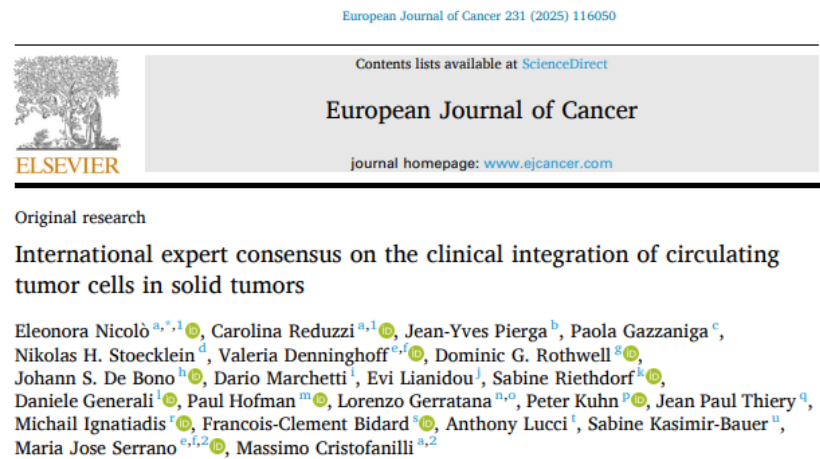
### CTCs (2)

- Cancer cells shed from the tumour into the blood
- CTCs provide protein, RNA and DNA information for multiomics

### ctDNA (3)

- DNA fragments shed from cancer cells into the bloodstream
- ctDNA provides a snapshot of information
- Limited availability in some cancer types

# Independent expert consensus confirms importance of CTCs



- Expert consensus predicts integration of CTC testing into routine clinical practice within 5 years
- CTCs provide distinct and impactful information that is not captured by circulating tumour DNA (ctDNA)
- 40% of the expert panel identified the Parsortix® platform as the most promising next-generation technology for clinical applications

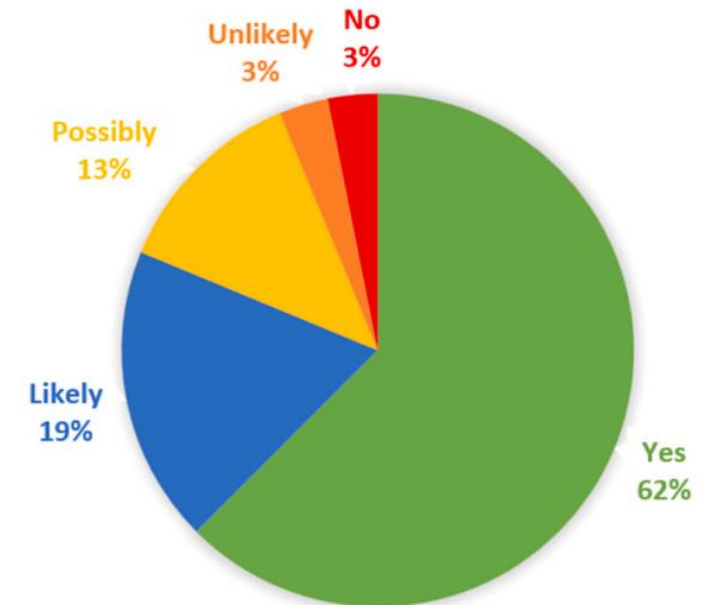
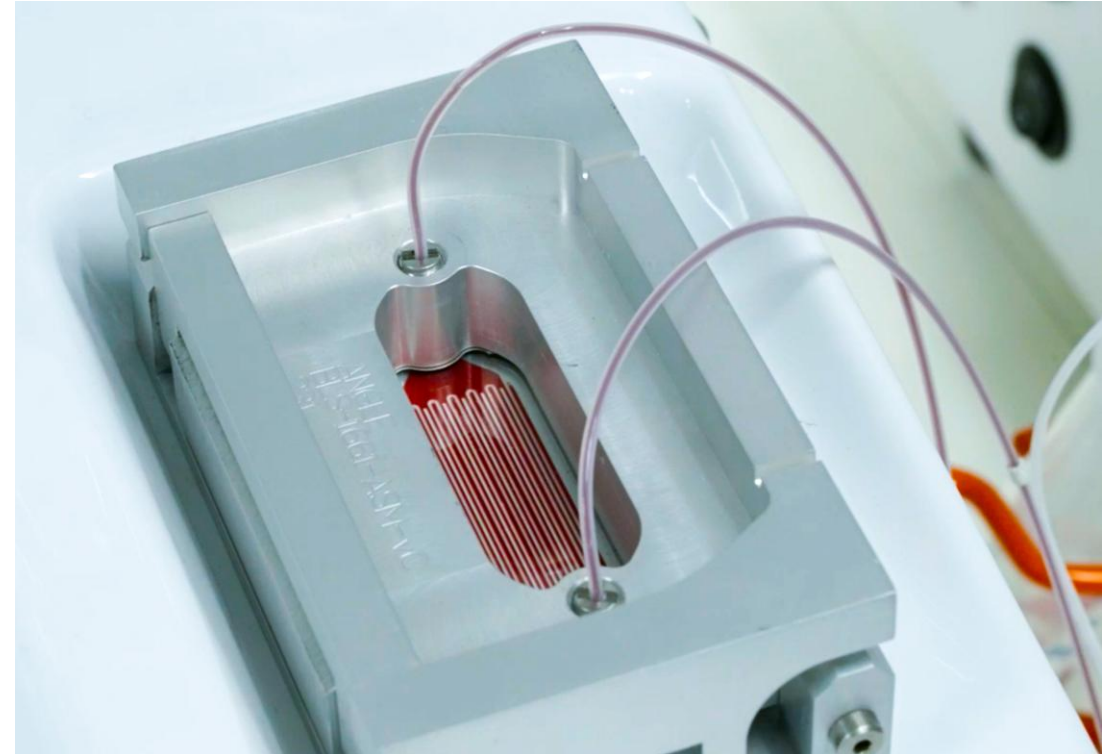


Fig. 4. In your opinion, are CTCs likely to impact the care of patients with cancer by 2030?.

>80% of clinical oncologists believe it is likely that CTCs will be used in cancer care within 5 years

# The Parsortix<sup>®</sup> platform provides a critical component

- Patented, scalable platform for capturing circulating tumour cells (CTCs) from blood
- Enables minimally invasive, cost-effective and repeatable testing of cancer cells
- Broad validation across 24 cancer types, accounting for >90% of solid tumours
- Actionable Insights: Cells compatible with standard protein, RNA, and DNA analysis
- Seamless Integration: Works with existing lab instruments



## Commercial validation

- >50 platforms sold post-FDA with 80% growth in sales (2022 vs. 2024)
- 15 services contracts generated £2 million in revenue
- >1,800 patient samples analysed for customers

## Regulatory excellence

- FDA-cleared platform for harvest of CTCs
- Manufactured under ISO 13485:2016 quality control
- 27 patents with coverage to 2034
- SOC 2 Type 2 certification



# Product and laboratory services focus

Streamlining of operations completed by 2025 year-end

Focus on **three key pillars:**

- 1. Product Sales:** Accelerating Parsortix platform adoption and consumable sales through CROs\* and clinical lab partnerships
- 2. Laboratory services:** Clinical trial support and assay development
- 3. Lab Developed Tests (LDTs):** Strategic partnerships using CTCs to expand the reach of existing tissue-based tests to generate recurring revenue e.g. Roche



***All revenue streams leverage the same IP, improving ROI and scalability***

# Strategic partnerships driving product adoption

Diagnostic Market expansion applying CTCs to existing tissue and DNA-based tests  
Pharma already engaging with CellBxHealth and partners

## Transferring tissue-based tests to CTCs



### BioView

- Collaboration to develop HER2 assay
- Contract executed and ongoing



### Myriad Genetics

- FDA-approved CDx
- Contract executed and ongoing



### Roche

- Key druggable biomarkers in big cancers
- Proof of concept completed
- Data to be presented at conference  
*4 November 2025*

## Transferring DNA-based tests to CTCs



### Illumina

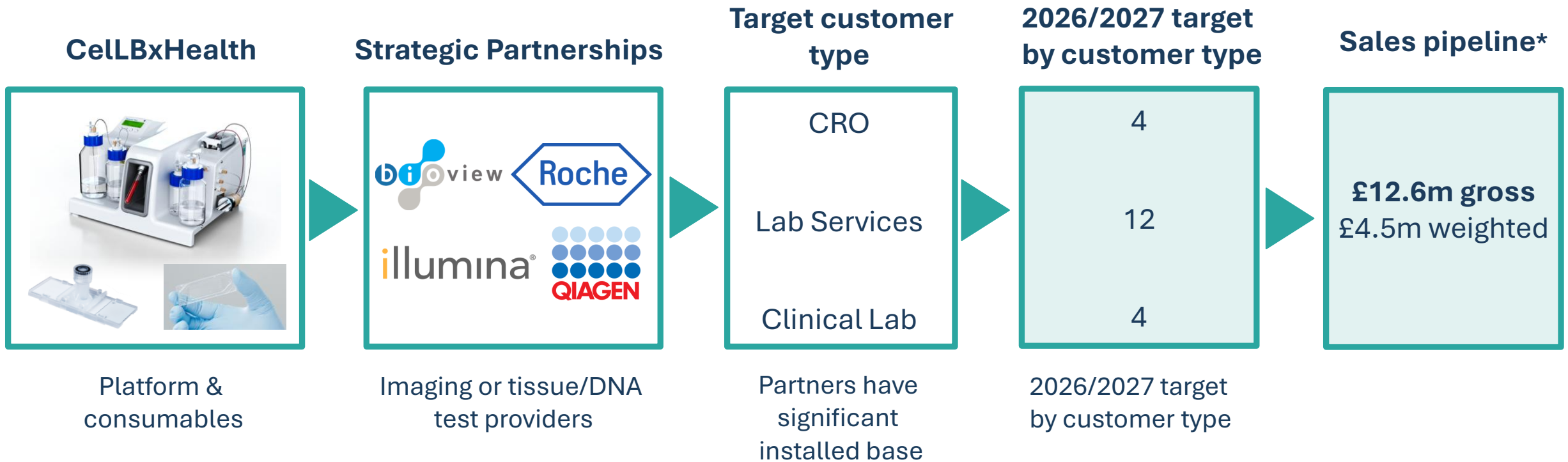
- Next-generation sequencing of CTCs
- CTCs provide additional and complementary information to ctDNA
- Collaborative relationship and co-marketing initiatives



### QIAGEN

- Parsortix platform for CDx pharma customers
- PCR based solutions
- In contract discussions

# Business model



***All revenue streams leverage the same IP, improving ROI and scalability***

# Milestones and Outlook

## Commercial milestones – 18 months to June 2027

### Product sales

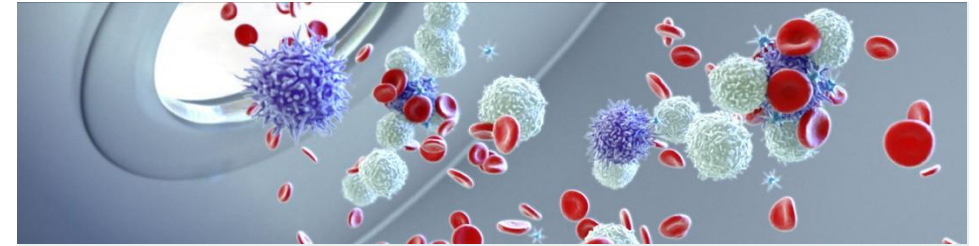
- Targeting contracts with four CROs and clinical labs
- Two technology transfer agreements to US clinical labs
- Successful bridging studies across multiple tissue-based tests

### Laboratory Services

- Five pilot programmes anticipated
- Three assay development projects
- Two Phase I/II trials executed with pharma partners

### Lab Developed Tests

- Successful completion of Lung Cancer study with partners
- Launch of test development programme with US clinical lab
- Launch of CellBx Insight-Breast and GBM in 2028



## Outlook

- Revenues of c. £1.6m in year to 31 December 2025
- Qualified sales pipeline of £12.6m and weighted pipeline of £4.5m (2026-2027)
- Focus on strict cost control/efficiency whilst driving commercial revenue
- Targeting GM of 70%+
- Expect to achieve revenues of £8m+ in the medium term, with breakeven anticipated in 2028

# Anticipated news feed and quarterly reporting



Company	Announcement	Date
<b>Roche Tissue Diagnostics</b>	Successful pilot study demonstrating CTC workflow on Roche’s tissue-based platform	Q4-2025
<b>US CRO</b>	Strategic CRO partnership in the US for clinical trials and LDT development	Q4-2025
<b>Pharma</b>	Follow on laboratory services contract	H1-2026
<b>Clinical Laboratory</b>	Collaboration to develop LDTs using the Parsortix platform and assays	H1-2026
<b>IVD tools company</b>	Product collaboration for CDx development	H1-2026
<b>DOW Biomedica</b>	CRO partnerships for BioPharma clinical trials across Asia	H1-2026
<b>Myriad Genetics</b>	Successful transfer of tissue-based assay to Parsortix CTC samples	H1-2026
<b>CellBxHealth</b>	Fourth quarter and full year 2025 unaudited results	Q1-2026
<b>CellBxHealth</b>	First quarter 2026 unaudited results	Q2-2026

# Financial reset

A lean and focused CellBxHealth, positioned for long-term, independent growth

Metric	2024	2025	2026
Annual Cash Burn	£14.5m	£12.7m	£5.5m
Gross Margin	62%	62%	71%
EBITDA	(£12.3m)	(£13.0m)	(£3.9m) positive from late 2028
Headcount	130	108	c. 44 (~60% reduction vs 2025)

- Restructure of the organisation and a significant reduction in footprint
- Focus on revenue-generating activities and projects

# Acquisitions in the liquid biopsy market (2020-2025)



Company acquired	Company Purchasing	Date	Region	Value (USD \$)	Analyte
Freenome	Exact Sciences	2025	US	\$700m	Multiomics
C2i Genomics	Veracyte	2024	MENA/US	\$70m	MRD
Haystack Oncology	Quest Diagnostics	2023	US/EU	\$450m	MRD
Yourgene Health	Novacyt	2023	UK/EU	\$21m	cfDNA/ctDNA
Resolution Biosciences	Exact Sciences	2023	US	\$54m	cfDNA/ctDNA
	Agilent	2021	US	\$695m	cfDNA/ctDNA
Inivata	NeoGenomics	2021	UK/US	\$390m	MRD/ctDNA
CelSee	Bio-Rad	2020	US	\$99m	CTCs

# Use of funds

	%	£ m	Key Objective
Research and Development	32%	£1.9m	Development of two products in brain and lung cancer, and strategic partnerships for validation of CTCs on tissue-based tests
Sales and Marketing	17%	£1.0m	Deliver revenues per commercial roadmap; S&M headcount increase
Restructuring and Cost Optimisation	18%	£1.1m	c.60% headcount and 50% footprint reduction, resulting in annual cost savings >£5.9m
IT Systems	3%	£0.2m	Replace legacy systems; build scalable, digital-first infrastructure
Working capital and cost of fundraise	30%	£3.6m	>50% reduction in operating costs (2026 vs. 2025)
<b>Total</b>		<b>£7.8m</b>	Assuming full take-up of the retail offer

# Summary of funding

- Successful fundraise of £6.8m gross announced 24 November 2025
- Strong support from our larger shareholders, with a number significantly increasing their positions
- Retail offer of up to £1m at an issue price of 1.0 pence per Ordinary Share
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# Appendix 1: Supplementary Information

# Strengthened team driving focused commercial growth



## Management



**Peter Collins**  
Interim CEO



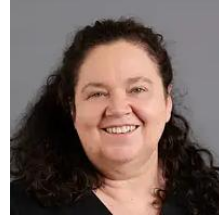
**Ghada Abuali**  
PhD, MBA  
COO



**Brett Swansiger**  
CCO



**Michelle Munson**  
HR Director



**Sinead Armstrong**  
BComm, FCA  
Finance Director



**Francesca Hendry**  
Sr. Director,  
Business  
Intelligence and  
Communications



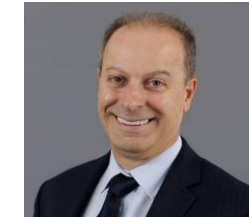
**Lavanya Sivapalan PhD**  
Sr. Director R&D  
and laboratory  
services



## Board of Directors & Advisors



**Dr. Jan Groen**  
Executive Chairman



**Joe Eid, MD**  
Non-Executive Director



**Klaas de Boer**  
Sr. Advisor to the Board



**Kim Oreskovic, CPA**  
Sr Advisor to the Board



# CellBxHealth in summary



## Location

Surrey Research Park  
Guildford  
United Kingdom



## Employees

Built on the foundation of ANGLE Plc  
Total team of 102 employees with  
plans to significantly streamline



## Capabilities

Isolation and analysis of cancer cells  
from blood (CTCs)  
Developing custom tests to inform  
precision medicine and drug  
development



## Facilities

Combined lab space of >7,000sqft  
with plans to streamline  
ISO 13485 certified



## Platforms & IP

Parsortix platform:  
Validated in 24 cancer types  
Regulatory approval in the US  
27 patents to 2034



## Market validation

Market leader in CTC analysis:  
>115 publications  
>8 clinical trials completed  
>240,000 samples processed



## Revenues

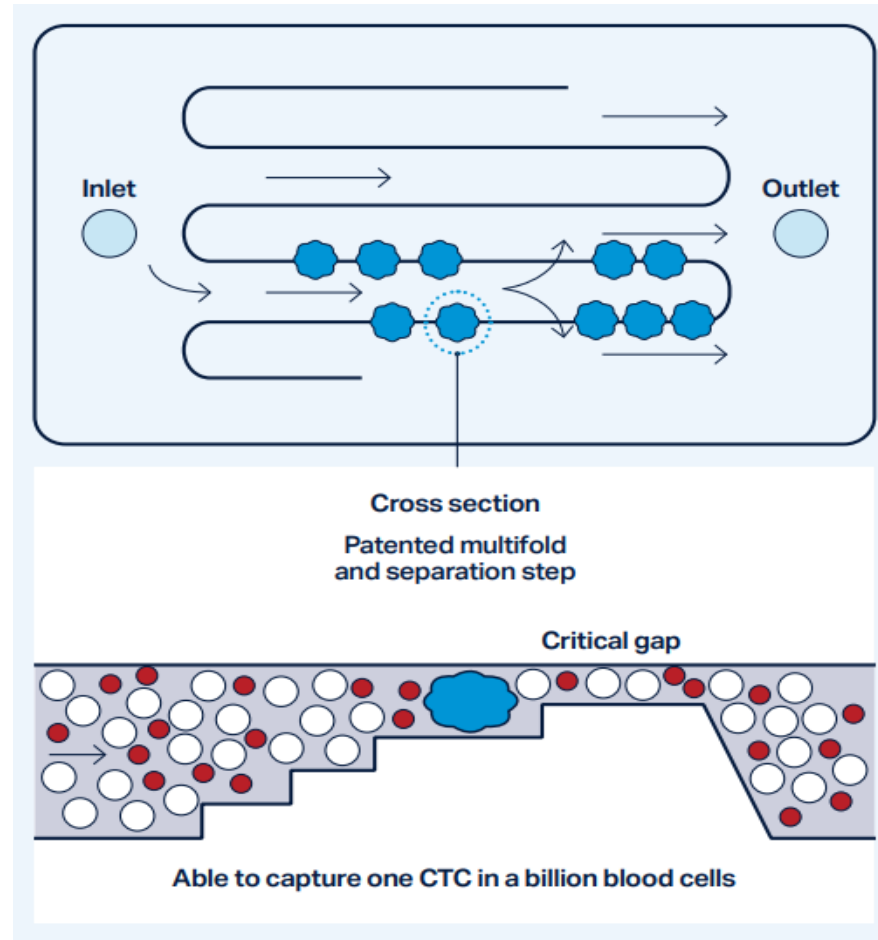
80% growth in product sales  
(2022 vs. 2024)  
15 pharma services contracts  
completed or ongoing



## Focus on commercial delivery

Through product sales, laboratory  
services and strategic partnerships  
EBITA positive by 2028

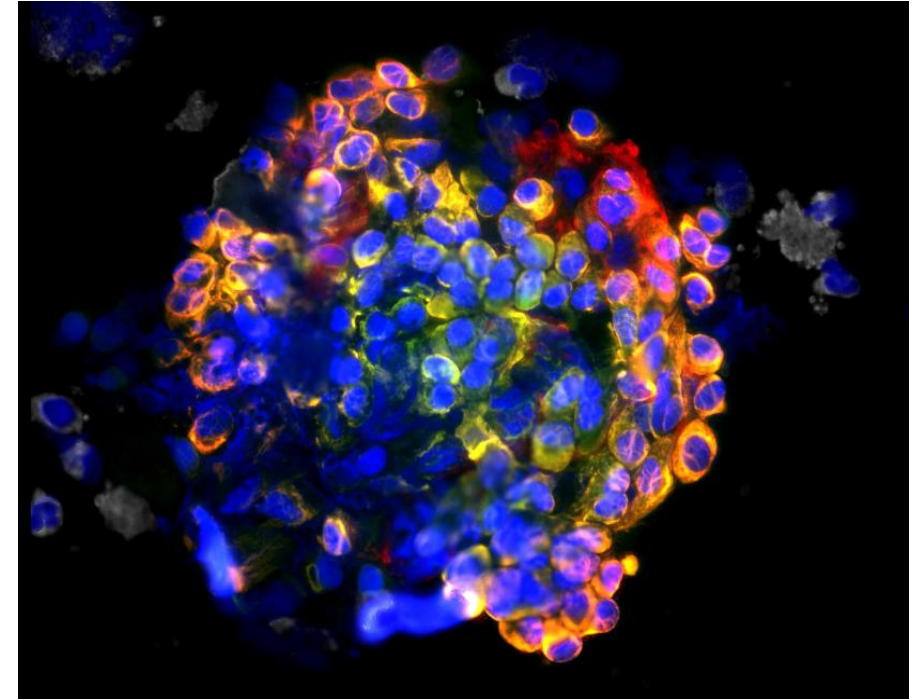
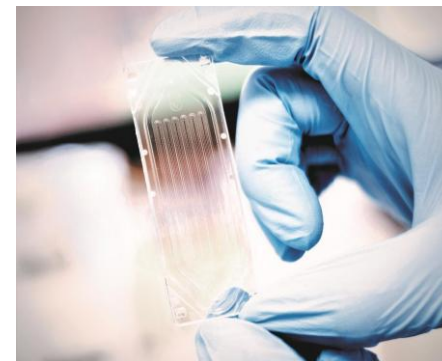
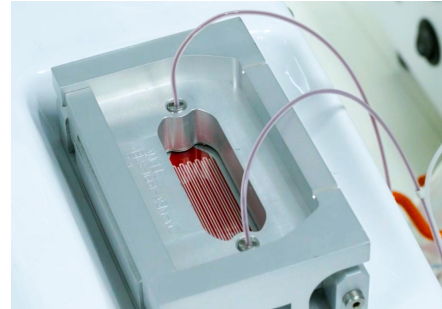
# CTC capture and harvest using the Parsortix system



Patented separation cassette and schematic

**Biomarker-independent** enrichment of CTCs based on:

- Cell Size
- Physical properties (deformability)



Circulating tumour cell cluster of 90 CTCs

# The Parsortix system in use



**Animation showing operation of Parsortix cassette**

<https://www.youtube.com/watch?v=MJNkr81k2Nw>







**Patient blood flowing in Parsortix cassette**

<https://www.youtube.com/watch?v=6mLcVloJ4Zk&t=6s>

# Platform well differentiated from competitors

The Parsortix platform provides marker-independent, live capture of CTCs suitable for multiple downstream analyses

				
Marker independent	✓	✓	✗	✓
Proven in many types of cancer (>10 types)	✓	✗	✓	✓
Simple process	✓	✓	✗	✓
Easily harvest cells for downstream analysis	✓	✓	✗	✓
Harvest suitable for multiple downstream analysis	✓	✓	✗	✓
Cell viability (alive)	✓	✓	✗	✓
CTC clusters	✓	✓	✓	✓
FDA cleared	✓	✗	✓	✗
Low cost	✓	✓	✗	✓
Product and service	✓	✗	✓	✗

# Business model pursuing multiple revenue streams



	Product Sales Business		Services Business	
<b>Targets</b>	<b>Cancer Research</b>	<b>CROs/Clinical labs</b>	<b>Laboratory services</b>	<b>Laboratory Developed Test</b>
<b>Value proposition</b>	Real-time cancer insights	High volume testing	Drug efficacy	Assessment of cancer where ctDNA may fail
<b>Customer base</b>	280 cancer centres and institutes, >4,200 medical schools	>1,000 CROs	>14,700 active phase 1 and 2 studies in cancer	Medical Oncologists 13,400 in US and 11,800 in EU
<b>Revenue model</b>	Platform, consumables, service contracts	Platform, consumables, service contracts	Contracted services	Provided by a clinical laboratory as a service
<b>Pricing model</b>	£44K/instrument and £261/cassette	£44K/instrument and £261/cassette	£ 100K- 650K per project	£1000-3000 per test
<b>Launch date</b>	Post-FDA clearance (2022) 51 instruments sold	Q2, 2025	2022	First launch anticipated Q2,2026
<b>Status</b>	46 centres in 15 countries	First contract in place, two in pipeline	15 contracts active or completed	Strategic partnerships and in-house assay development

## Clinical Need

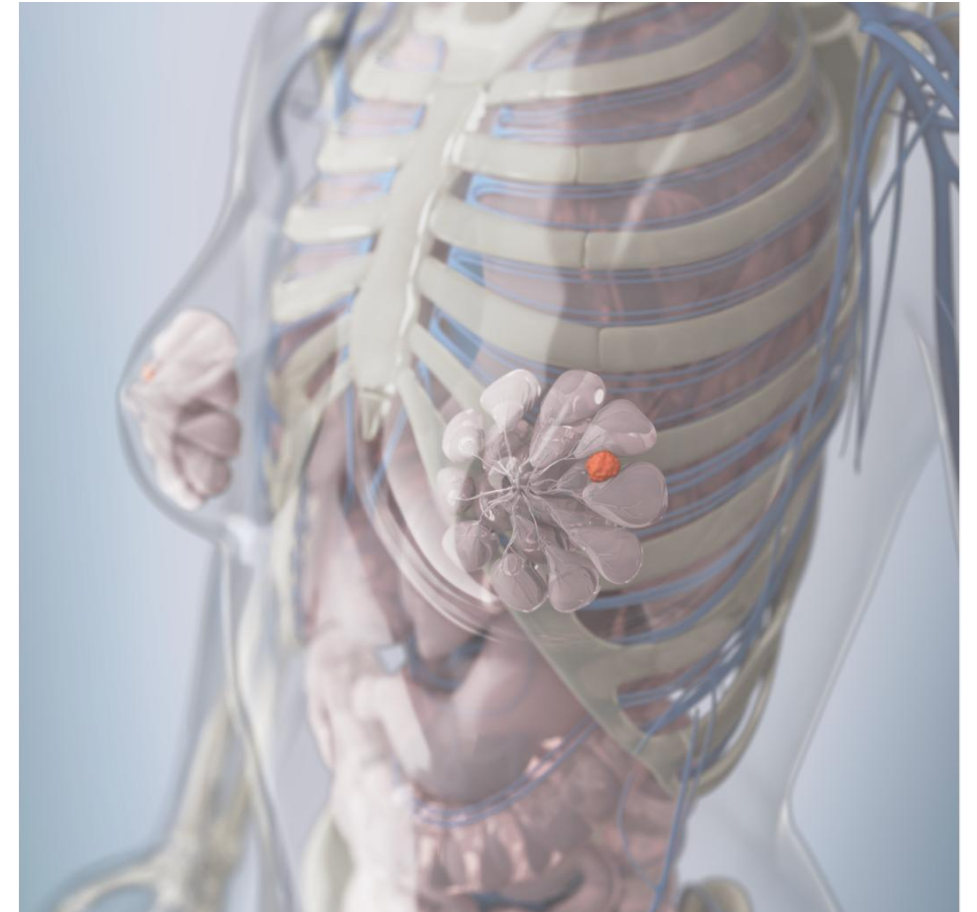
- Imaging detects relapse late; ctDNA has poor sensitivity in many breast cancer subtypes
- HER2 conversion in brain metastases is frequent and impacts eligibility for life-saving therapies

## Solution: CTC-based monitoring + HER2 phenotyping

- Provides early detection of recurrence and real-time HER2 status evolution

## Why

- Opportunity to capture HER2 switching events missed by ctDNA, unlocking targeted therapy options



# Lung cancer – right drug at the right time

## Clinical need:

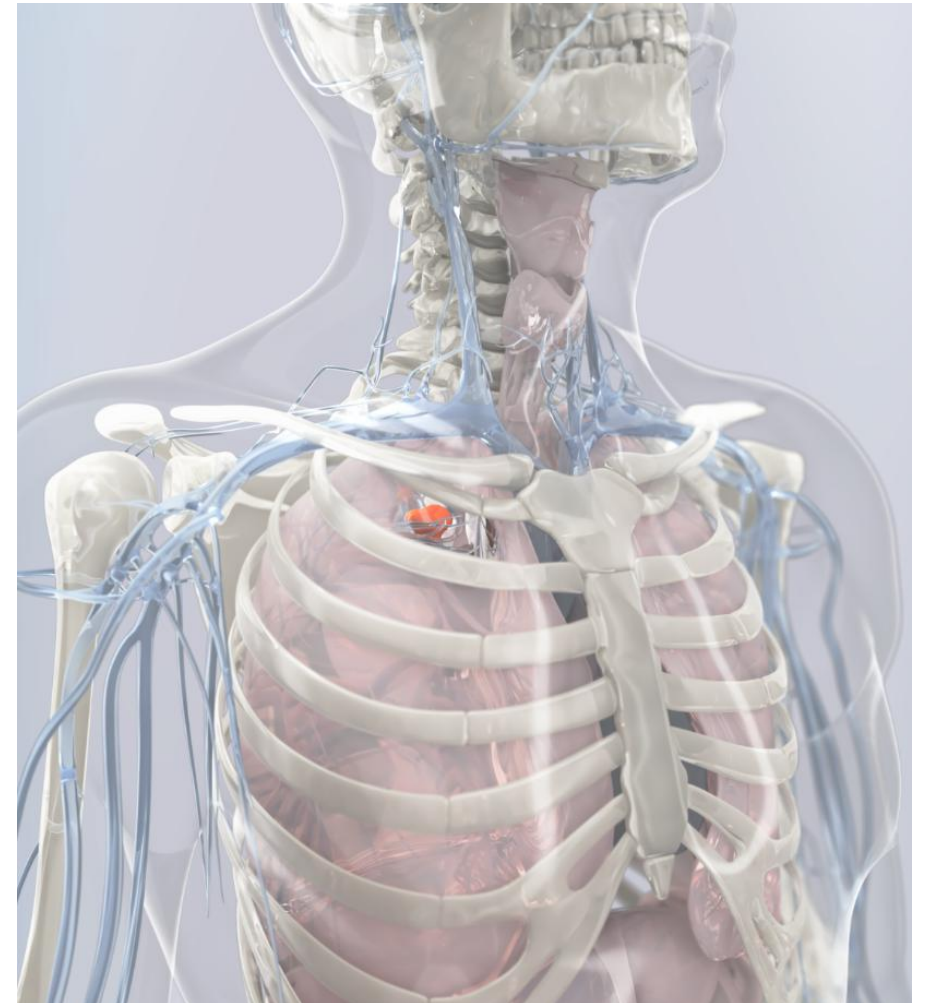
- Up to 20% of advanced NSCLC patients have no detectable ctDNA, leaving them without actionable molecular data
- Lack of genomic information limits access to targeted therapies
- Tissue biopsy is often invasive, delayed, or unfeasible

## Solution:

- Integrate CTC-DNA analysis with existing ctDNA testing
- Use the Parsortix platform to isolate and sequence CTCs for additional genomic insights
- Identify actionable mutations missed by ctDNA alone

## Why:

- Expands molecular detection in ctDNA-negative patients
- Reduces the need for repeat tissue biopsy
- Could increase proportion of patients eligible for targeted therapy



# Glioblastoma – critical unmet need

## Clinical Need

- Glioblastoma (GBM) is one of the most lethal brain cancers, with poor survival and very limited biopsy options
- ctDNA is unreliable in GBM due to low shedding and the blood–brain barrier

## Solution - Combined CTC enumeration + targeted NGS assay

- Captures tumour burden and key actionable genomic alterations (EGFR, TERT, IDH1/2, PTEN, MGMT)
- Successful proof-of-concept work completed in 15 patients

## Why

- Addresses a major unmet need in neuro-oncology where current liquid biopsy approaches fail
- Workflow that enables **stratification, resistance tracking, and adaptive therapy guidance**
- Potential to expand into other CNS tumours

