



Complimentary Report

*Global Impact of Bevacizumab
Revocation in mBRCA*

The
Arcas
Group

Contact:
info@thearcasgroup.com
info@mdoutlook.com

www.thearcasgroup.com

Atlanta | Philadelphia | Europe

Global Clinical Impact of the U.S. FDA's Revocation of Bevacizumab's Marketing Authorization in Metastatic Breast Cancer

Source: MDOUTLOOK Global Quick Poll:
FDA Revoking Approval for Bevacizumab in Metastatic Breast Cancer

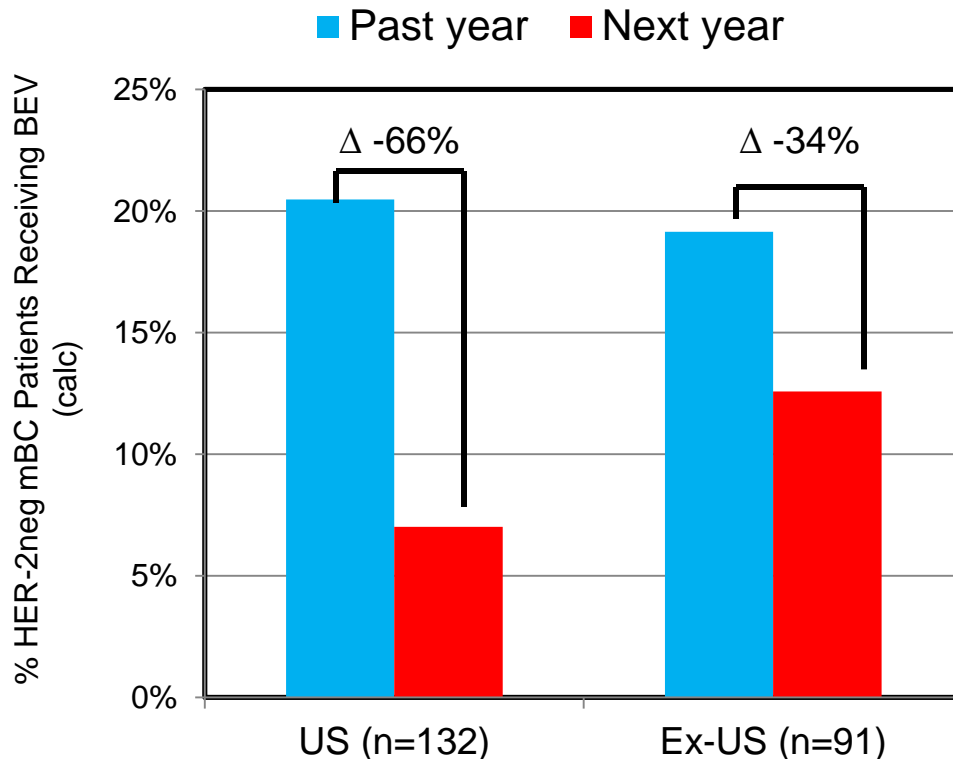
Fielded: November 19, 2011
232 Total Respondents (as of 11/22/2011)

Quick Poll Background and Methodology

- On Friday, November 18, 2011, the U.S. Federal Drug Administration (FDA) revoked its regulatory approval concerning the use of bevacizumab (Avastin®) in HER-2 negative metastatic Breast Cancer. In response to this action, Genentech announced it was moving forward with a new clinical trial including biomarkers to try to identify those most likely to benefit from receiving bevacizumab. Medicare subsequently announced it would continue covering the cost of bevacizumab for this indication
- This Global Quick Poll was launched at 8 a.m. EST on Saturday, November 19th to gauge the immediate response of the oncology community to this news
- 232 responses were received by Tuesday, November 22nd at 8 a.m. EST
 - 59% of responses were from US (39 states)
 - 36% of responses from EU
 - Overall respondents were from 24 different countries
- No financial compensation was provided to the participants

FDA's Action Will Severely Limit the Usage of Bevacizumab in the Treatment of HER-2 Negative Metastatic Breast Cancer

Recent and Future Usage of Bevacizumab for HER-2neg mBC



Key Conclusions

- Overall usage of bevacizumab (BEV) in metastatic breast cancer (mBC) will be cut in half following the FDA's revocation of its label extension in mBC
 - Expected to reduce by 2/3 in US
 - Outside of US will still decrease by 1/3
- Similar proportional decreases seen in heavy users of bevacizumab (those who use it in >50% of their relevant patients) (data not shown)

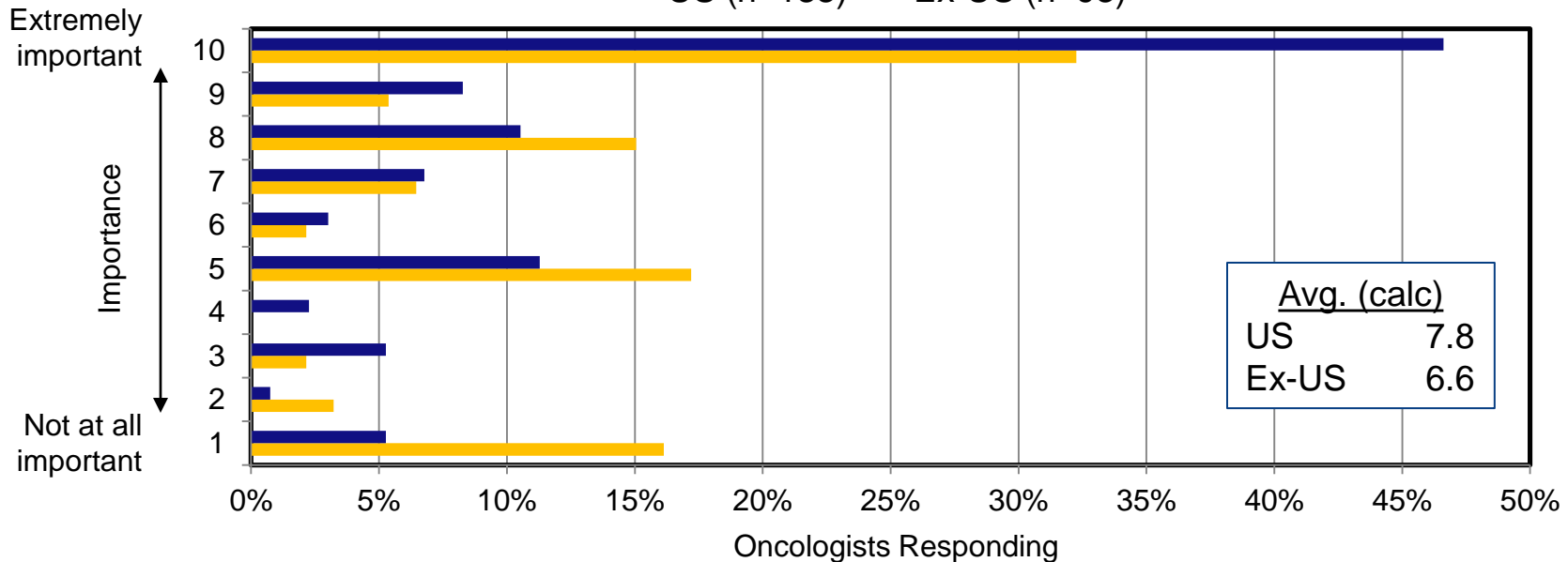
Survey Question: In the past 12 months, approximately what proportion of your patients with HER-2 negative metastatic breast cancer (mBC) has received treatment with bevacizumab? Following this FDA decision, what proportion do you anticipate treating with bevacizumab in the next 12 months?

Source: MDOUTLOOK Global Quick Poll

Insurance / Payer Coverage of Bevacizumab for Metastatic Breast Cancer Will Have Significant Role in the Decision Making Process

Importance of Payer Coverage to Decision to Use Bevacizumab for mBC

■ US (n=133) ■ Ex-US (n=93)



Key Conclusion

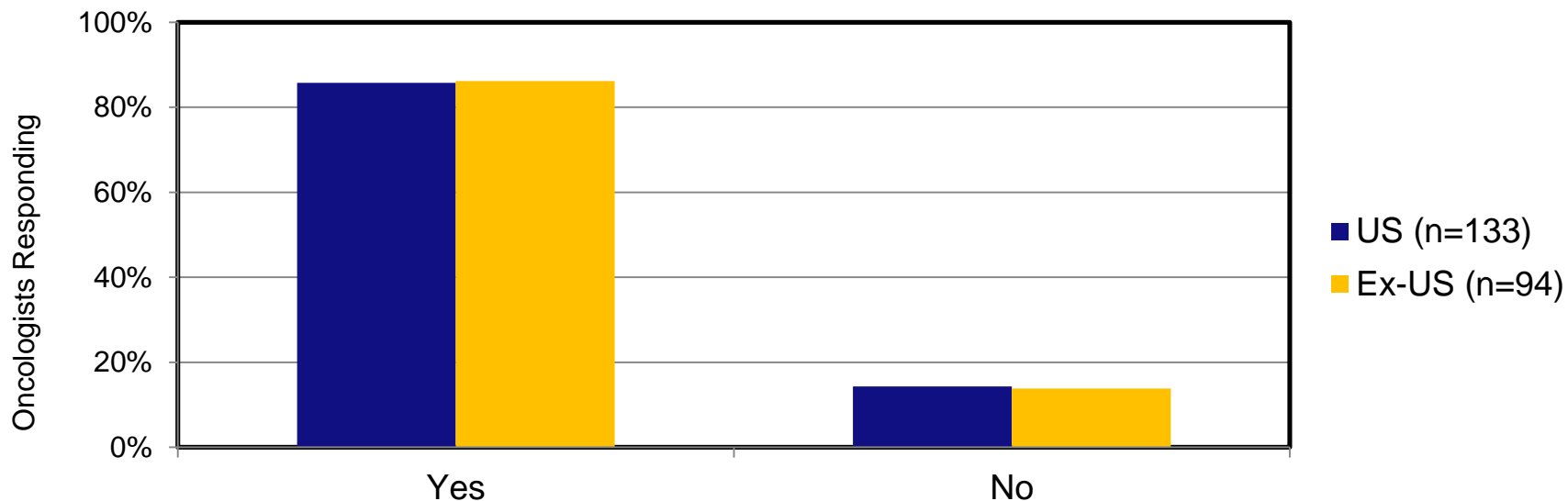
- Standard payer coverage of bevacizumab in mBC will be a key driver for its future use, especially in the U.S
 - Nearly half of US oncologists rate payer coverage as an extremely important decision driver
 - One in three oncologists outside the US also see as an extremely important factor

Survey Question: How important is standard insurance / payer coverage of bevacizumab (as opposed to exceptions to policy) to any decision to use bevacizumab for metastatic breast cancer.

Source: MDOUTLOOK Global Quick Poll

There is a High Amount of Interest in a Biomarker-Driven Trial for Bevacizumab in Metastatic Breast Cancer

Interest in Referring Patients to New Biomarker-Driven Clinical Trial for Bevacizumab in mBC



Key Conclusions

- Nearly 7 out of 8 oncologists are interested & willing to refer patients to the new clinical trial for bevacizumab in HER-2neg mBC.
- Geographic location has no impact on the willingness to refer patients to this new clinical trial

Survey Question: If locally available to you and your patients, would you consider referring patients to the new Genentech-sponsored clinical trial integrating a biomarker to identify those metastatic breast cancer patients most likely to respond to bevacizumab?

Source: MDOUTLOOK Global Quick Poll

Conclusions on the Global Clinical Impact of the U.S. FDA's Revocation of Bevacizumab's Marketing Authorization in Metastatic Breast Cancer

- The FDA's actions will have a dramatic impact on the usage of bevacizumab in HER-2 negative metastatic breast cancer
 - Usage in the US will decrease by two-thirds
 - Usage outside of the US will decrease by one-third
- Insurance / Payer coverage will be a key component of the oncologist's decision process on whether or not to use bevacizumab for breast cancer
 - More important in the US than in other locations but still of importance everywhere
 - This is of the utmost importance to between 1/3 (Ex-US) and 1/2 (US) of oncologists
- Although usage of bevacizumab in practice will be strongly decreased, most oncologists are still interested in the concept of using bevacizumab for metastatic breast cancer and will refer patients to a new clinical trial for it

The Arcas Group

A strategic marketing services company specializing in:

- Disease intelligence
- Clinician & ThoughtLeader identification and profiling
- Physician / treater engagement



The MDOUTLOOK Platform



“Total Oncology Intelligence”
A Critical Step Ahead

MDOUTLOOK Value

Oncology Intelligence
ThoughtLeader Insight

MDOUTLOOK®

Powered by The Arcas Group

MDOUTLOOK = ACTIONABLE ONCOLOGY INSIGHT

Unique online platform offering a comprehensive intelligence in:

- **Global clinical decision patterns**
- **Clinical treatment choices**
- **ThoughtLeader identification and influences**
- **Treater mapping and referral patterns**

Superior Targeting of Cancer Treaters

- **Covers 62,000+ treaters globally**
 - 30,000+ in US
 - 17,000+ in Europe
 - Multi-disciplinary composition
- **Rich individual profiles for clinicians, ThoughtLeaders, Institutions - updated 2x/year**
- **Disease-specific treatment profile available per treater**
- **Real-time intelligence feeds**

The screenshot displays the MDOUTLOOK Physician Profile for Daniel R. Budman, MD. The interface includes a navigation bar with options like 'Home', 'Admin', 'Physicians', and 'ThoughtLeaders'. The profile is organized into several sections:

- Personal Information:** Daniel R. Budman, MD, Associate Director, Dana-Farber Division of Oncology.
- Primary Clinical Role:** Medical Oncology.
- Areas of Clinical Interest:** Breast, Hematology, PTCL.
- Affiliation:** North Shore University Hospital Center for Advanced Medicine, 485 Lakeside Road, New Hyde Park, NY 11042, USA.
- Other Affiliations:** NYU Langone Medical Center.
- Association Membership:** AACR, ASCO, ASH, ESMO, STAF ASSOCIATION, ISARF, CALGB.
- Publications:** Lists several recent publications, including 'Emerging role of small ribonucleic acids in gastrointestinal tumors' and 'The hedgehog pathway as a therapeutic target for treatment of breast cancer'.
- Clinical Trials:** Lists ongoing trials such as 'Paclitaxel, Irinotecan Albumin-Stabilized Nanoparticle Formulation, or Irinotecan With or Without Bevacizumab in Treating Patients With Stage IIIC or Stage IV Breast Cancer' and 'Anticoagulation and Inferior Vena Cava Filters in Cancer Patients With a Venous Thromboembolism'.

Innovative Multi-channel Intelligence

**Deep analysis of proprietary
MDOUTLOOK® databases**

**Customized and advanced segmentation by tumor,
discipline, geography, office setting**

ThoughtLeader analysis, insight & perspective

**Real-time intelligence
through on-going clinician interaction**

**Continuous streaming of intelligence from
validated sources**

**Total
Oncology
Intelligence**

Unique Insight from Respected Experts

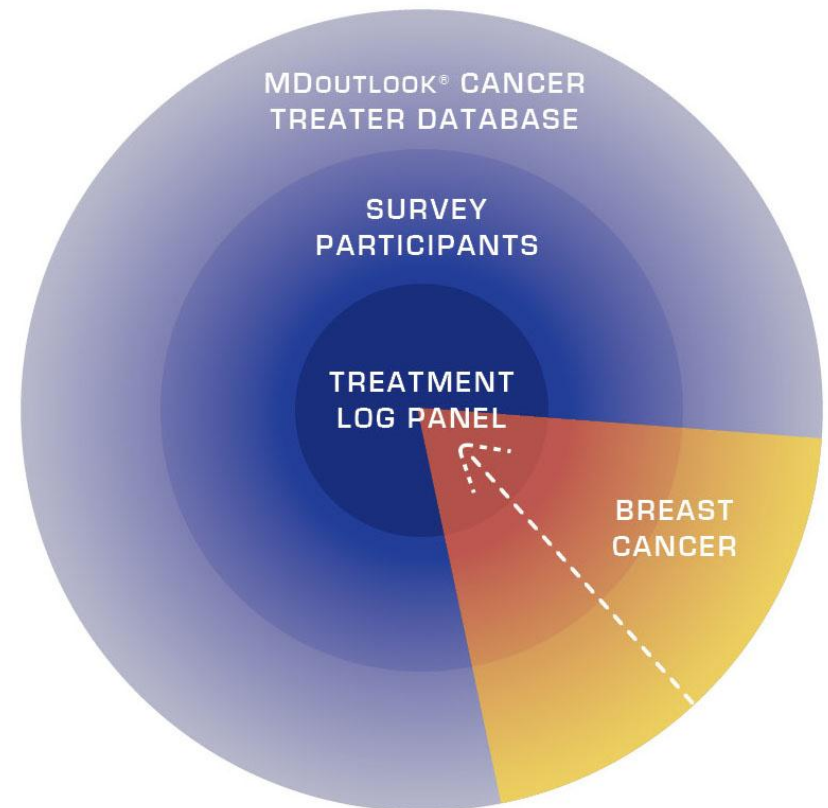
- **Exclusive and unique involvement of prominent ThoughtLeaders**
- **Experts provide insight into disease area and analysis**
- **Ensure direct and clinical relevance of surveys and treatment logs**
- **Multi-disciplinary composition**

Strategy Council

Lauren Pinter Brown, MD	John Kirkwood, MD
Alexander Eggermont, MD, PhD	Sagar Lonial, MD
Keith Flaherty, MD	Peter Mohr, MD
William Gradishar, MD	Joyce O'Shaughnessy, MD
Axel Hauschild, MD	Nicholas Thatcher, MD, PhD
Peter Heald, MD	Alan Venook, MD

Robust Disease Coverage

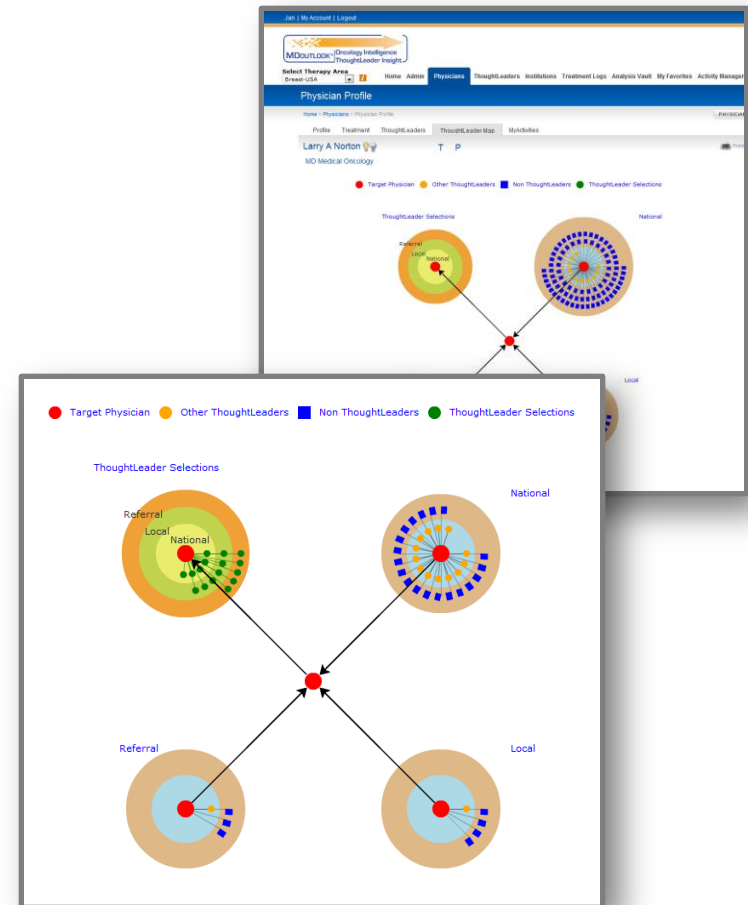
- **Uniquely involves Strategy Council of prominent ThoughtLeaders**
- **Utilizes advanced segmentation by tumor, discipline, and key demographics**
- **Specifically recruited panels of treaters report monthly disease-specific treatment decisions**



**Guided by ThoughtLeader
Strategy Council**

Market-driven ThoughtLeader Identification & Mapping

- Peer-nominated, bottom-up identification of ThoughtLeaders
- Interactive network mapping, providing insight into their real sphere of influence
- Multi-level classification showing national and international experts, regional experts and referral physicians
- Identifies referral patterns up-to 3 levels deep



Multi-dimensional, Real-time View of Clinical Decision Making

- Patient Treatment Logs provide objective insight into how and why patients are being treated
- Real-time monthly and aggregate reporting
- Uniquely combines quantitative and qualitative insight by providing rationale for each clinical decision
- Fully compliant with medical and privacy practices (US+EU)

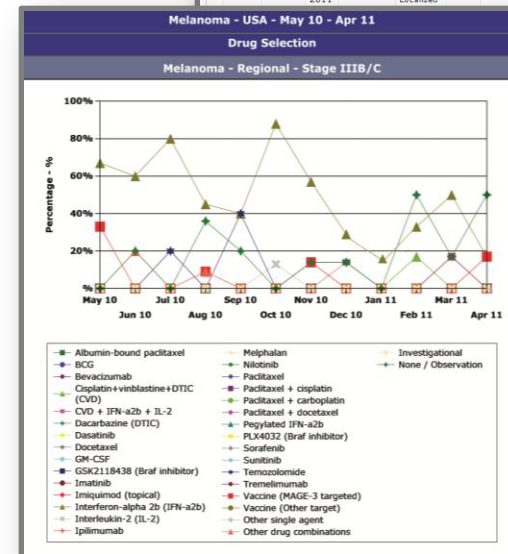
Treatment Logs

Home > Treatment Logs

1 2

Normal View Patient Groups

Patient Demographics			Diagnosis				Treatment			Patient Enrolled in Clinical Trial		Ulceration status		Treatment adjustments		Formulation
Ider	Country	Date of diagnosis	Date of 1st SLH status	Date of 1st medical (drug) intervention	Disease	Stage	Lab Normal	Type of Diagnosis	Treatment Selection	Patient Enrolled in Clinical Trial	Ulceration status	Treatment adjustments	Formulation			
USA		03-26-2012	04-07-2011	N/A	Melanoma - Localized	Stage IIA	True	Histological	Surgery / Excision + Observation		NA	None / Observation	Non-ulcerated			
USA		03-07-2011	03-24-2011		Melanoma - Regional	Stage IIIB/C	True	Histological	Immunotherapy	True	Adjuvant	Vaccine (MAGE-3 targeted)	Ulcerated			
USA		02-24-2011	03-17-2011	N/A	Melanoma - Localized	Stage IA	True	Histological	Surgery / Excision + Observation		NA	None / Observation	Non-ulcerated			



Distribution of these materials for informational purposes to colleagues is freely allowed. PowerPoint slides of this report are available upon request.

For more information or to schedule a capabilities discussion, please feel free to contact us.

Contact:

**info@thearcasgroup.com |
info@mdoutlook.com
888.3OUTLOOK | 888.368.8566
+1.404.496.4136 (International)**



The
Arcas
Group

www.thearcasgroup.com

Atlanta | Philadelphia | Europe