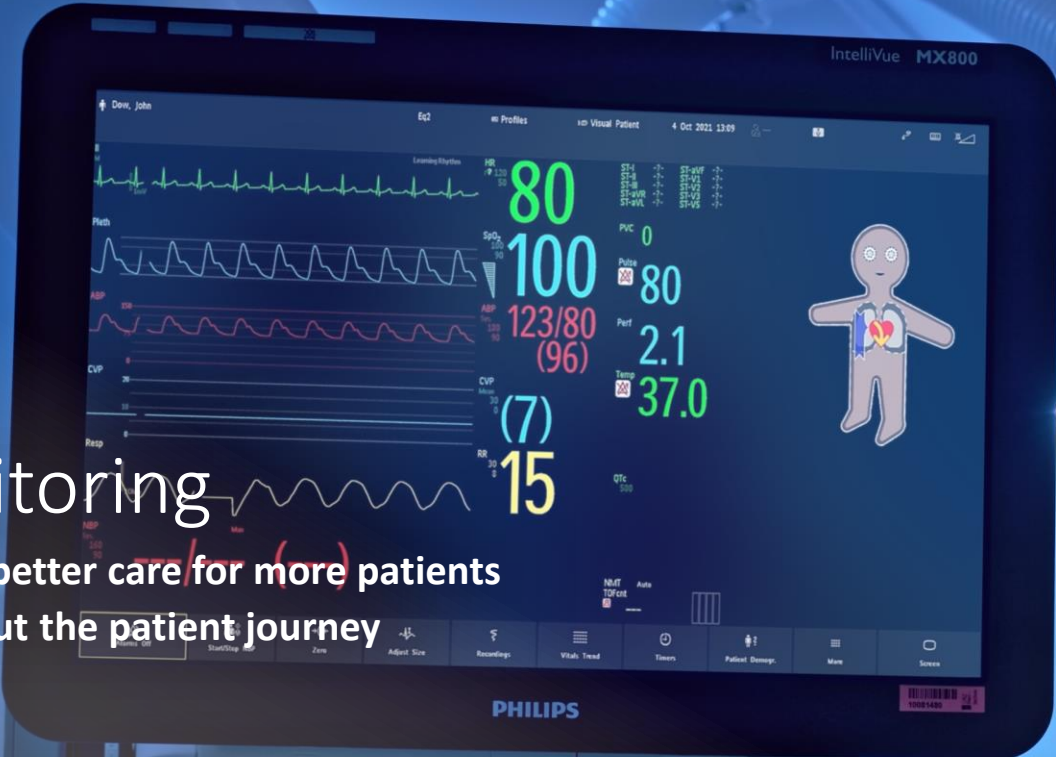


SATIHEP



Monitoring

Enabling better care for more patients throughout the patient journey

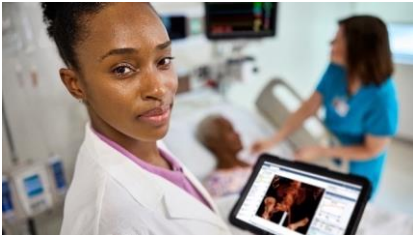
Julia Strandberg
Chief Business Leader Connected Care
September 17, 2024

Global leader in both hospital patient monitoring and ambulatory monitoring services

Hospital Patient Monitoring



Ambulatory Monitoring & Diagnosis



#1 Globally

- #1 Continuous patient monitors
- #1 Telemetry
- #1 MR monitors

#1 Globally

- #1 Mobile Cardiac Telemetry
- #2 Extended wear holter services

EUR ~3 billion sales

Enabled by industry leading Enterprise Informatics

#1 data integrator in the US

Market growth driven by customer consolidation and need of monitoring across the patient journey

Addressable market

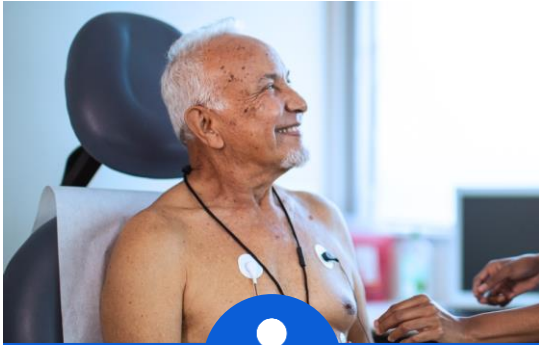
EUR **12 billion**
in 2023

Low to mid-
single-digit
2022 – 2025 CAGR

Key market trends

- Customer consolidation and standardization in U.S.
- Expansion of continuous monitoring outside of ICU
 - 112k ICU vs. 917k non-ICU acute care beds in the U.S
- Rising costs, staff shortages
 - Shortfall of 10 million workers by 2030
- More complex patients
 - Multiple chronic conditions account for 70% of stays
- Need for insights before, throughout and after the hospital

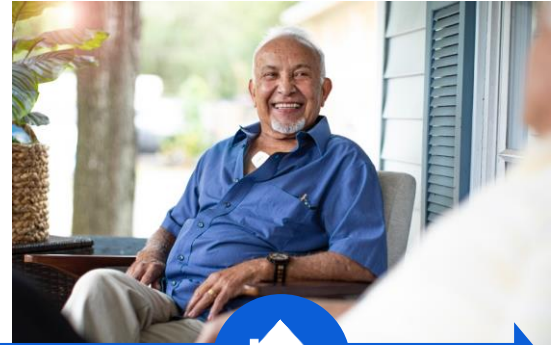
Uniquely positioned to enable better care for more patients through seamless solutions spanning clinic, hospital and home



Clinic



Hospital



Home

Integral part of health system infrastructure | Health system-level scale | C-Suite access

AI capabilities, insights and data management | Cyber-security

Unmatched portfolio breadth and deep customer relationships as key differentiators to win



Largest installed base

- Bridging across portfolio
- Disease-specific care models

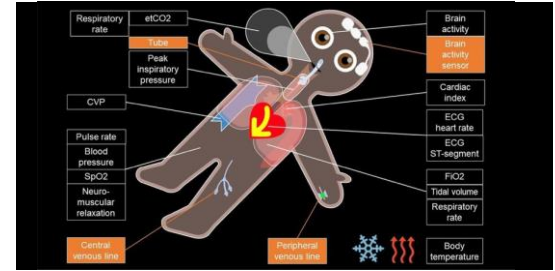
In 91 of top 100 U.S. hospitals



Innovative business models

- Enabling as-a-service models
- Long-term partnerships

EMaaS¹ across 49 care sites
Bon Secours Mercy Health partnership



Innovations beyond hardware

- Connecting systems to integrate data
- Improving efficiency, insights and clinical outcomes

Assertively expanding our AI portfolio

Distinct ability to improve clinical outcomes and productivity through automation and interoperability

Hospital and ambulatory monitoring platform



Enterprise Informatics



Collect

Best in class monitors, sensors and software



Organize and integrate

Aggregation, interpretation, presentation of data



Analyze

Orchestration and AI engines for decision support



Act

Seamless communication for collaboration and coordinated care



Medical device integration



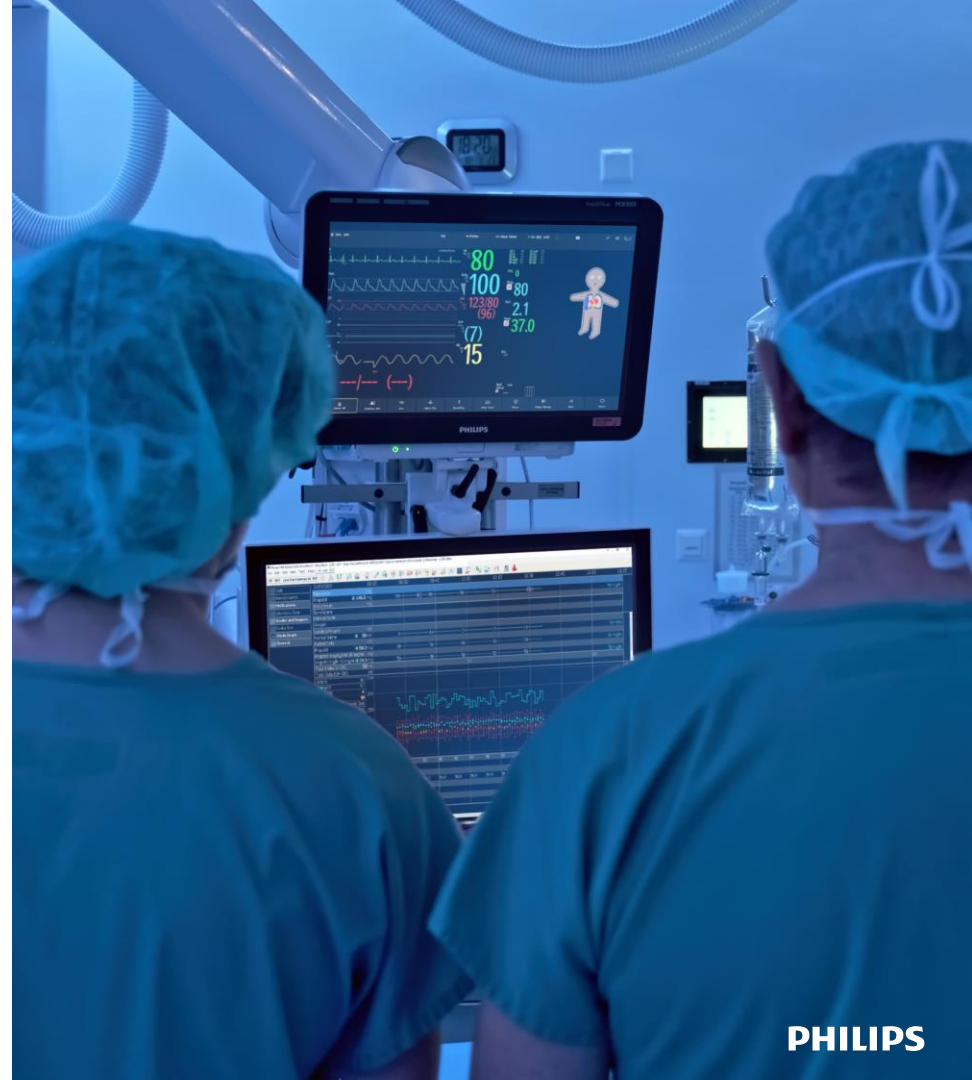
Cardiovascular informatics



Acute care management

Key takeaways

- The only global player with leading positions in both hospital and ambulatory monitoring
- Market growth driven by customer consolidation as well as expansion outside ICU and hospital
- Unmatched portfolio breadth and deep customer relationships as key differentiators to win
- Improving clinical outcomes and productivity through automation and interoperability



PHILIPS