Results

2015 – Another record year
At a glance

Strong growth in all areas

Invested capital in Swiss start-ups

<table>
<thead>
<tr>
<th>Year</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>CHF m</td>
<td>300</td>
<td>400</td>
<td>500</td>
<td>600</td>
</tr>
</tbody>
</table>

Financing rounds of Swiss start-ups

<table>
<thead>
<tr>
<th>Year</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number</td>
<td>80</td>
<td>100</td>
<td>120</td>
<td>140</td>
</tr>
</tbody>
</table>

Invested capital: 676 CHF m

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At a glance

Strong growth in all areas

- 120 financing rounds
- **Volume**: CHF 676 million
- 48% more funds
- **Upswing was broadbased**
- Amount invested doubled since 2012
At a glance

Largest financing rounds in Romandie

- ADC Therapeutics, VD, CHF77m
- ObsEva, GE, CHF60m
- Asceneuron, VD, CHF30m
- Nutresia, VD, CHF25m
- Genkyotex, GE, CHF20m
- Sophia Genetics, VD, CHF15m
At a glance

Largest financing rounds in Romandie

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Sectors

Strong increase in biotech

Invested sum in CHF m

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ICT rounds in Romandie

- 12 financing rounds – out of 61
- PIQ, VD, CHF5.1m
- Geosatis, JU, CHF2.2m
- Goodwall, GE, CHF2.1m
- Protonmail, GE, CHF2m
- Skioo, VD, CHF1.5
Phases

The valley of death

Distribution of financing rounds, 2015

[total number = 74]
No. of transactions

Financing amount (CHF m)

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Phases

Every third start-up receives more than CHF 5m

< CHF1m 6 (8%)
≥ 1m and < CHF5m 43 (58%)
≥ 5m and < CHF10 m 7 (10%)
≥ 10m and < CHF20 m 6 (8%)
≥ CHF20 m 12 (16%)

74 start-ups disclosed financial numbers (62% of the total of 120)
Cantons

Growth in breadth

Invested sum by canton (CHF m)

<table>
<thead>
<tr>
<th>Canton</th>
<th>CHF m</th>
</tr>
</thead>
<tbody>
<tr>
<td>SZ</td>
<td>5.6</td>
</tr>
<tr>
<td>TG</td>
<td>8.7</td>
</tr>
<tr>
<td>ZG</td>
<td>22.5</td>
</tr>
<tr>
<td>SG</td>
<td>4.5</td>
</tr>
<tr>
<td>Others</td>
<td>6</td>
</tr>
<tr>
<td>BS</td>
<td>86</td>
</tr>
<tr>
<td>LU</td>
<td>96.2</td>
</tr>
<tr>
<td>GE</td>
<td>100</td>
</tr>
<tr>
<td>VD</td>
<td>173.3</td>
</tr>
<tr>
<td>ZH</td>
<td>173.2</td>
</tr>
</tbody>
</table>

Zurich and Vaud share 51%
Key facts: invested amount

- Vaud losing 14%
- **Zurich gaining 34%**
- Share of Vaud and Zurich from 72% to 51%
- **ICT 60 % of total funds invested in ZH**
- Two thirds of biotech investment went to Western Switzerland
Cantons

Examples

Dennis Just
CEO Knip
No 1 in Switzerland
and Germany
100 employees

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Cantons

Examples

Ernest Loumaye
CEO ObsEva
Serial entrepreneur
(Preglem)
CHF92m raised
Cantons

Growth in breadth

Financing rounds by canton

[Diagram showing investment in 18 cantons with specific numbers for each: ZH 50, VD 25, ZG 10, BS 8, GE 7, BE 3, LU 3, SZ 3, Others 11]
International comparison

VC investments 2015

- Germany: CHF3.4 billion
- UK: CHF2.9 billion
- France: CHF1.7 billion
- Switzerland: CHF0.7 billion

Source EY, Swiss VC Report

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International comparison

VC investments per capita 2015

- Germany: CHF42
- UK: CHF45
- France: CHF26
- Switzerland: CHF84
- Berlin: CHF657
- Basel-Stadt: CHF452

Source EY, Swiss VC Report
International comparison

VC investments 2015 in different sectors

ICT:
• Germany: CHF3.0 billion
• Switzerland: CHF0.1 billion

Life Sciences:
• Germany: CHF221 million
• Switzerland: CHF484 million

Source EY, Swiss VC Report
Conclusion

Summary

• Encouraging Trend
• Strong life sciences sector
• ICT sector with potential
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