

Pioneering a New Era of Patient Access and Affordability



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Since the early 2000s¹, copay cards have gone unchallenged as the pharmaceutical industry's leading approach to market access, despite being blunt instruments and the source of great consternation amongst stakeholders in the industry.

Copay Cards



Awareness

\$30B

spent on marketing brands & copay offers (e.g., brand.com, GoodRx)

Utilization

~3%

of patients utilize

Adherence

<1

incremental fill

Sempre

\$0

to get copay offer in front of every in-network patient (via payer data)

Awareness

~30%

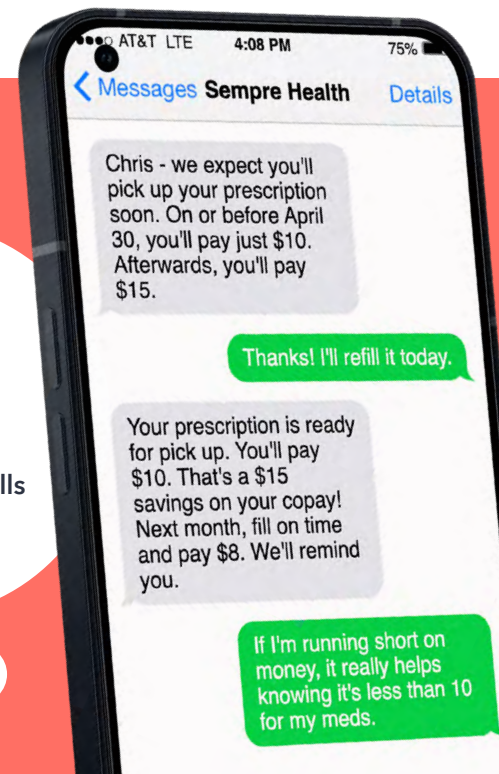
of patients utilize

Utilization

4+

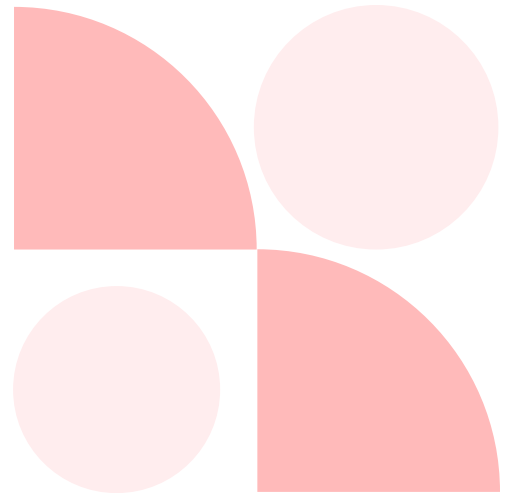
incremental fills

Adherence

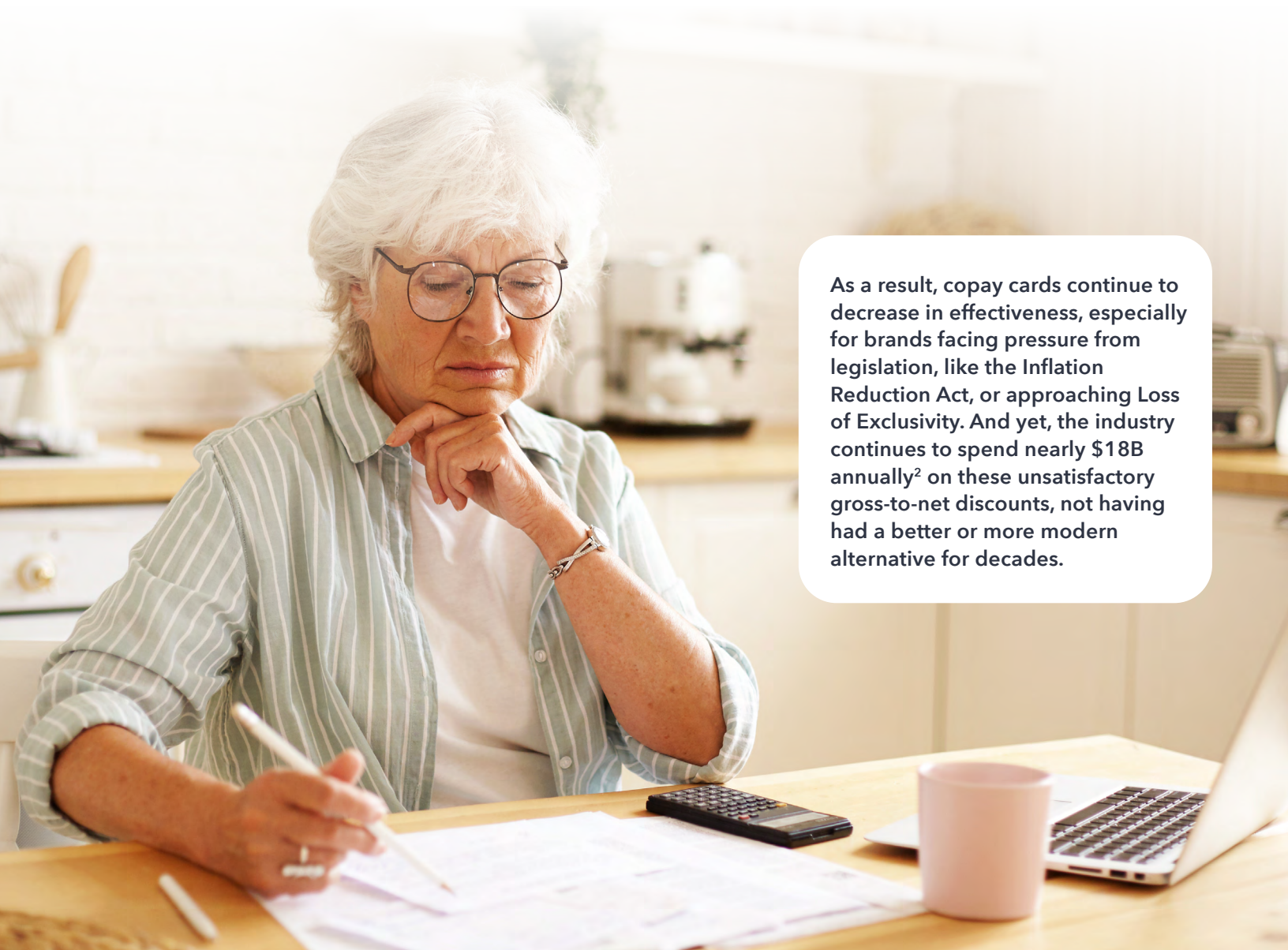


Copay cards—when utilized—are effective at offsetting patients’ out-of-pocket costs, but they suffer from major drawbacks:

- Costly in marketing to patients
- Onerous for patients to enroll in and utilize
- Ineffective at driving sustained adherence



As a result, copay cards continue to decrease in effectiveness, especially for brands facing pressure from legislation, like the Inflation Reduction Act, or approaching Loss of Exclusivity. And yet, the industry continues to spend nearly \$18B annually² on these unsatisfactory gross-to-net discounts, not having had a better or more modern alternative for decades.



A new way to reach patients

Sempre's novel approach to market access allows affordability dollars to reach patients through their health plan as a channel.

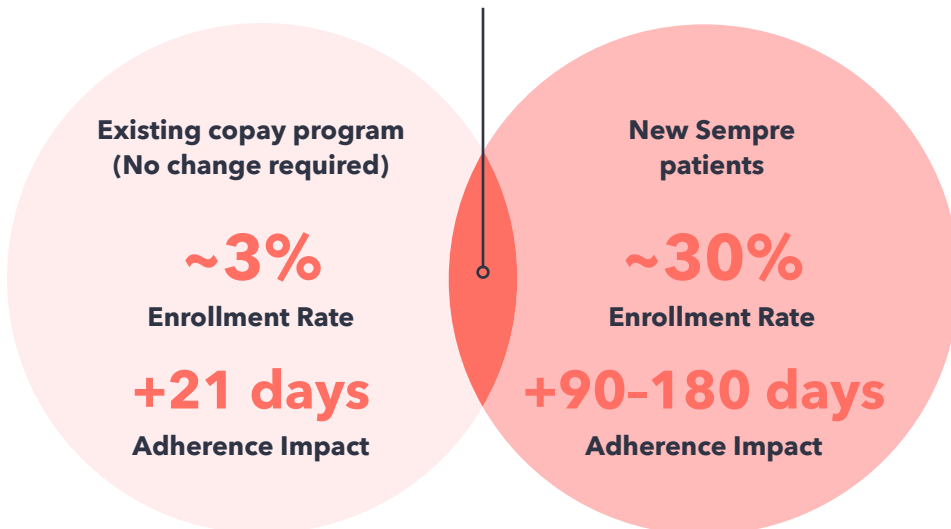
Unlike traditional solutions, which utilize direct-to-consumer marketing or worse, invisible discounting at the point-of-fill, Sempre's platform uniquely relies on data provided by health plans directly. Not only does this significantly decrease the ~\$30B dollars spent on medication marketing and awareness each year³, but it also ensures that affordability solutions reach every eligible

patient—right in their homes, through trusted channels.

Due to this alignment with health plans, Sempre programs are significantly more effective at enrolling patients. Patients often rely on their health plans to navigate the healthcare system and receive programs tailored to their needs, and Sempre's invitations, which

include payer logos and branding, drive between 30-40% enrollment⁴, more than 10X the enrollment in traditional copay cards⁵. This also means that Sempre is reaching copay naive patients - with only 9% of those who enroll ever having accessed an affordability solution prior⁶. Like medications themselves, market access solutions only work if patients use them.

From Sempre's live programs, only 9% of patients who enrolled in Sempre have used a copay program before



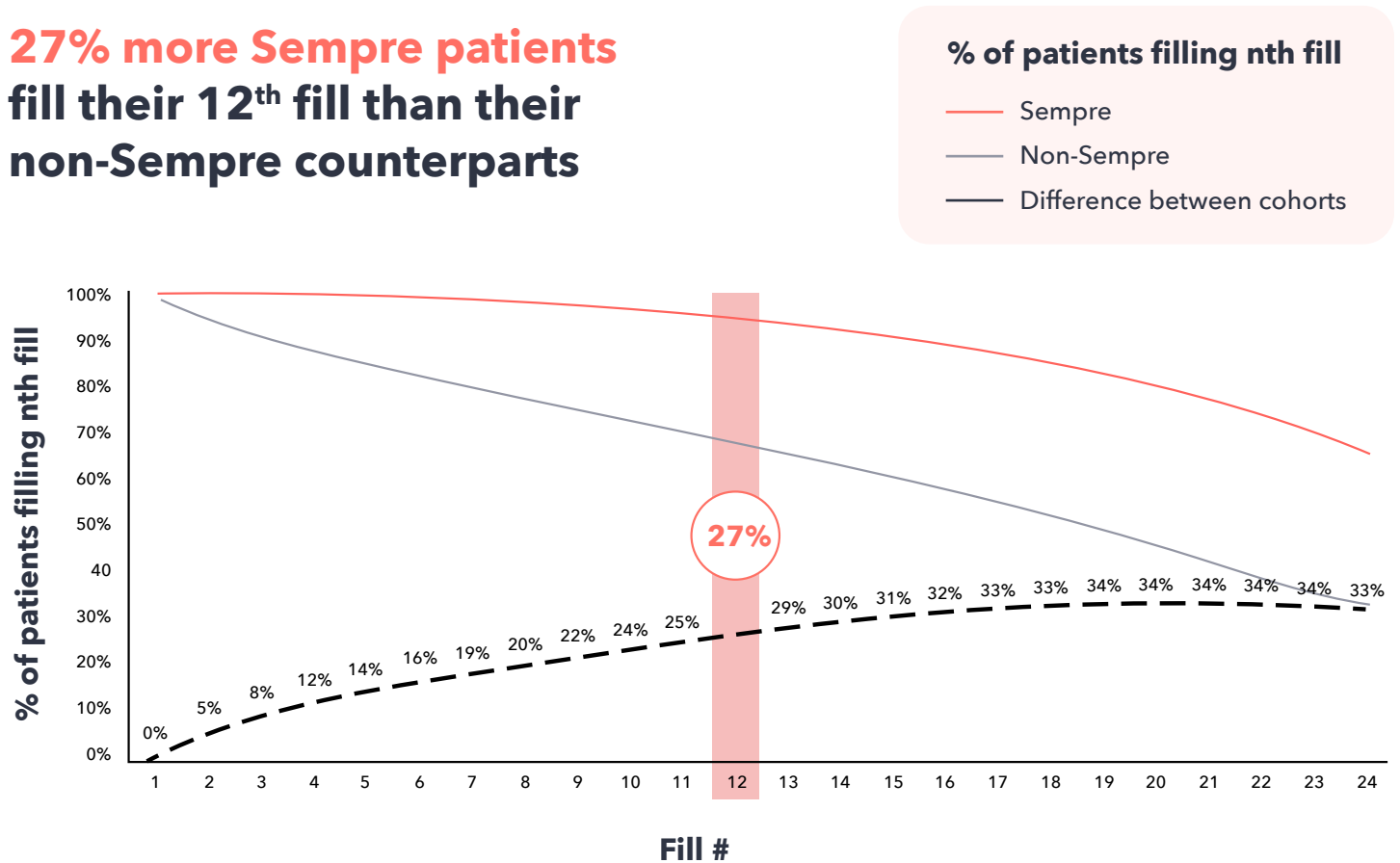
This improved utilization of manufacturer offers via Sempre, at a small fraction of the cost to drive awareness, is just the first of many ways in which Sempre is redefining market access for the patient.

Consistent outperformance on adherence outcomes

Sempre drives 3-4X the adherence impact of traditional copay cards

Sempre’s combination of a behavioral economics-based dynamic discount, combined with on-demand SMS engagement, has proven to be a powerful formula for driving greater than 20% improvement in adherence⁷ across multiple therapeutic classes, geographies, and demographics. And, 27% more Sempre patients fill their 12th fill compared to a matched control group of non-Sempre users, demonstrating a lasting effect on retention⁸.

27% more Sempre patients fill their 12th fill than their non-Sempre counterparts



Notes: ¹Patients are matched on month of initial fill date. ²Sempre n = 13,649, Non-Sempre n = 58,820. ³Data set includes patients filling 25 products across 11 payers. Includes patients with over 2 years of continuous eligibility. ⁴Fills normalized to 30-day equivalence.

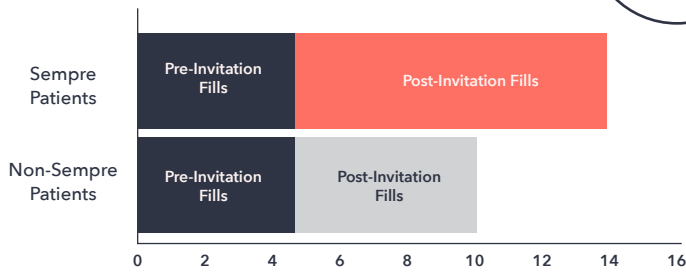
In 2022, Sanofi observed a 25% increase in adherence attributable to the Sempre intervention for patients taking Lantus, Toujeo, and Soliqua⁹. In 2023, UPMC Health Plan published in the Journal of Managed Care and Specialty Pharmacy a 21% increase in adherence attributable to Sempre for patients taking anticoagulants and antiplatelets¹⁰. Most recently, in 2024, Blue Shield of California presented at the Academy of Managed Care Pharmacy Conference a 14% increase in adherence attributable to Sempre for patients taking various chronic disease medications¹¹.

Sempre’s own studies have demonstrated a similar impact on incremental fills—regardless of drug or stage of lifecycle.

Sempre's impact has been repeated across brands and therapeutic areas

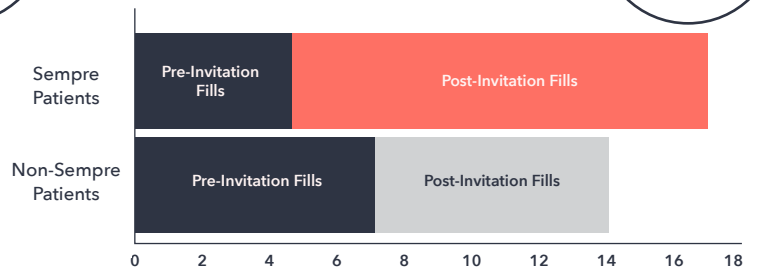
Sempre-CVD program leads to 4.2 incremental fills per patient

+4.2
Incremental fills driven by the Sempre program



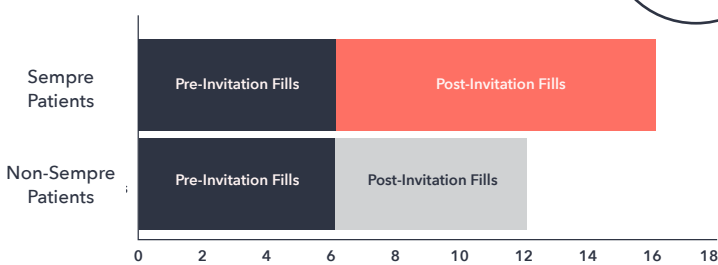
Sempre-Insulin program leads to 2.4 incremental fills per patient

+2.4
Incremental fills driven by the Sempre program



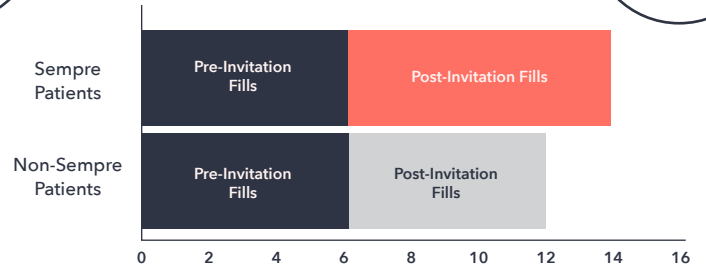
Sempre-Insulin program leads to 4 incremental fills per patient

+4
Incremental fills driven by the Sempre program



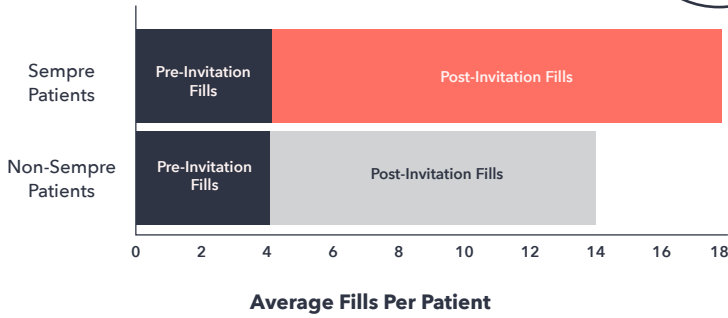
Sempre-Insulin program leads to 2.8 incremental fills per patient

+2.8
Incremental fills driven by the Sempre program



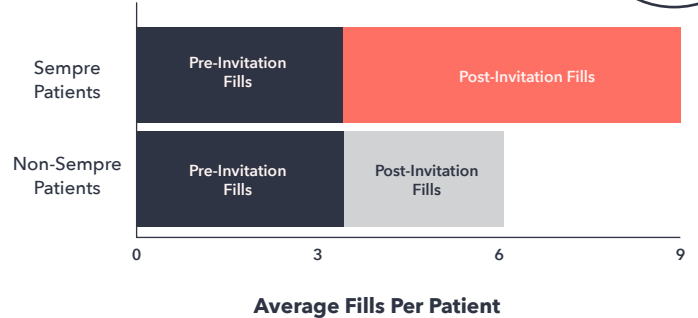
Sempre-Diabetes program leads to 4 incremental fills per patient

+4
Incremental fills driven by the Sempre program



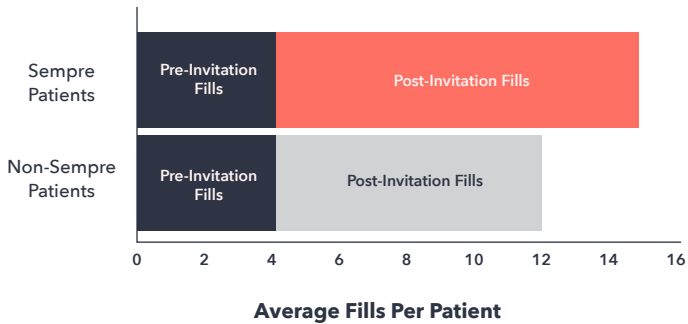
Sempre-Respiratory program leads to 3.3 incremental fills per patient

+3.3
Incremental fills driven by the Sempre program



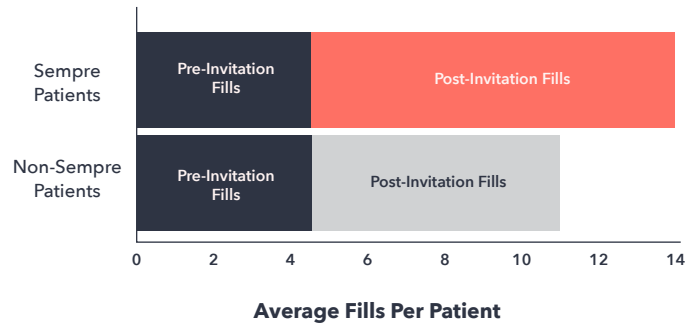
Sempre-Diabetes program leads to 3 incremental fills per patient

+3
Incremental fills driven by the Sempre program



Sempre-Diabetes program leads to 3.5 incremental fills per patient

+3.5
Incremental fills driven by the Sempre program

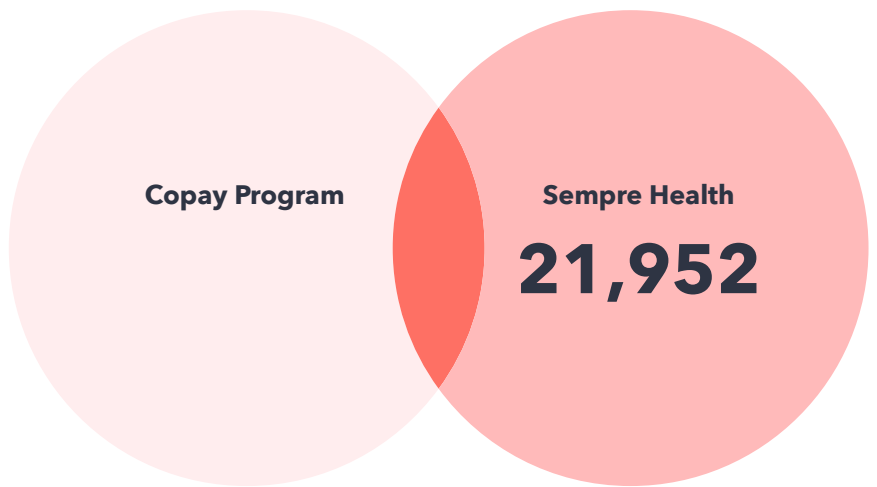


Compared to Sempre's adherence lift of 120 incremental days of therapy, the 21 days in incremental therapy that a copay card drives, as published in IQVIA's LAAD dataset in 2020, is no longer impressive, nor is it surprising. A traditional one-size-fits-all offer, without a personalized patient engagement component, cannot possibly address the evolving needs of digitally-native patients in the 21st century.

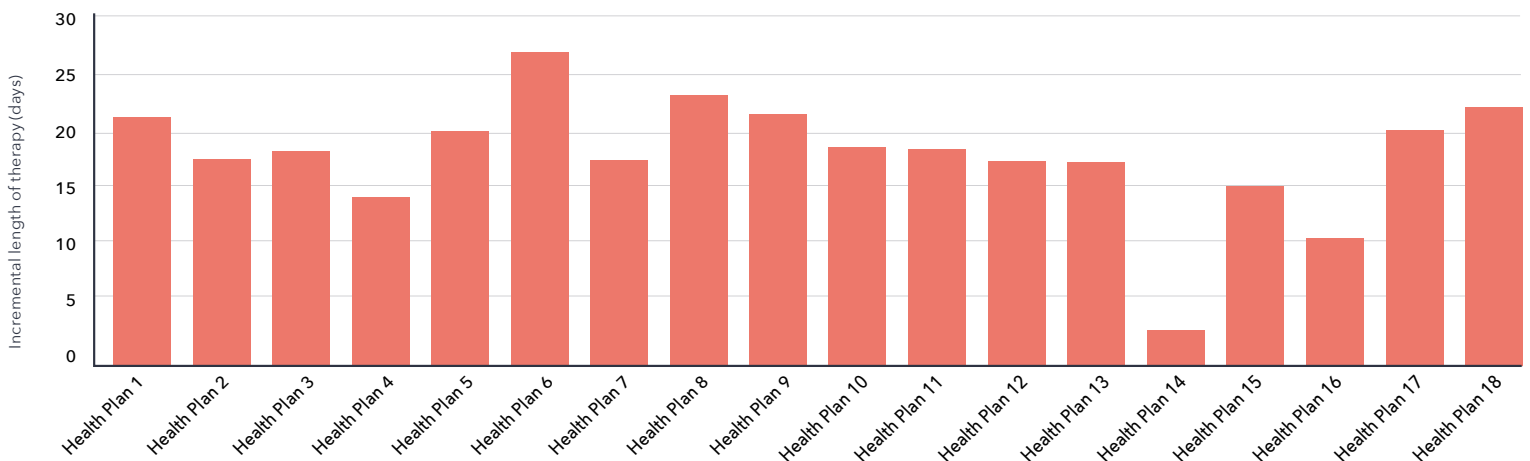


In 2020, for one cardiovascular drug facing LOE, approximately 22,000 patients were commercially insured within Sempre Health's payer network but were not receiving copay benefit assistance via the brand's copay card

- Average adherence of this patient cohort was **214 days**
- Average adherence for patients in the brand's copay program for the same payer mix is **237 days**
- The net impact of the the brand's copay card, therefore, is **21 days**



Modest 21 day improvement in adherence from brand's copay card



Notes: Analysis performed within IQVIA's Longitudinal Analysis and Adjudication Data (LAAD) for the full year 2020

Even for patients receiving discounts via a copay card, Sempre's SMS capabilities drive **2 incremental fills**

One case study of a population already using a \$0 copay card compared to a Sempre population also paying \$0, but receiving rich engagement along the way, found that the Sempre group filled on average **two more times** in a 12 month period¹². This means that even when cost was completely eliminated as a barrier, patients still preferred the conversational and convenience aspects of a Sempre program.

+2 incremental fills with Sempre's SMS engagement alone

Background

For patients using a leading diabetes brand's \$0 copay card at the time of their enrollment with Sempre, Sempre enrolled the patients in an SMS-only program layered on top.

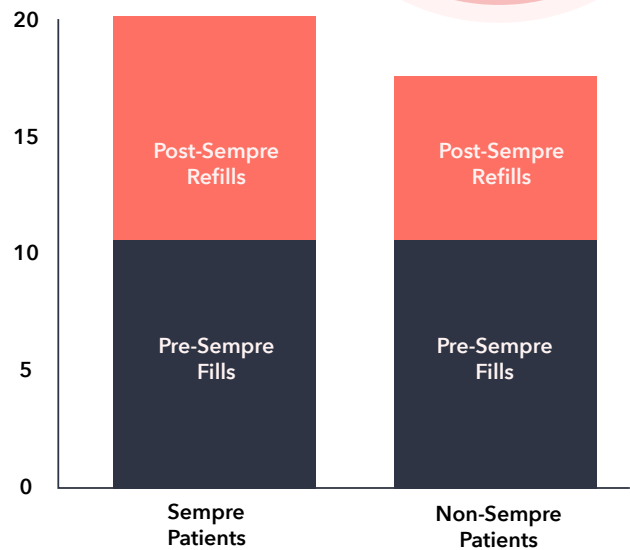
I picked it up the other day Thanks for the reminder it does keep me on track

First I love the discount especially when every year your co pays seem to go up. Second I love the reminders because life gets crazy and as I get older things tend to slip my mind with all that's going on. Third I love the friendly staff always nice and kind and helpful

\$525 is a lot of money to save. I am so blessed to be a part of the SEMPREHEALTH program. I don't know how I got so lucky. Thank you Sempre!! I patiently wait each month for your text informing me of my free refill! It is awesome! Once again, thank you!

Hello. Thanks for the reminder I've been so busy but I'll go today.

I love this program. Please keep it going. The savings are great so the reminders are even better



Results

These patients did not receive additional financial incentives from Sempre, however they filled **2 incremental fills** relative to a comparable non-Sempre cohort, in the first 12 months after Sempre's introduction.

Note: Sempre cohort includes 254 active patients who were already paying \$0 through an existing copay card prior to enrollment with Sempre; Non-Sempre cohort includes a sample of over 8,600 non-Sempre patients taking the same drug; Sempre and Non-Sempre sample populations matched to have similar characteristics on pre-Sempre length of therapy and starting copay; data represents first 12 months after each patient's invitation to program and includes only patients who had at least 12 months of data; all fills normalized to 30-day supply equivalent;

SMS—the only ubiquitous form of patient communication

Mobile apps and complex logins present more of an obstacle than a solution for care, especially for aging populations.

As of 2022, there were greater than 350,000 health and medical applications in the global market¹³, each proposing a fragmented solution and requiring frequent updates and settings to be configured for use.

Sempre's utilization of the text thread as the single destination for all engagement has proven its appeal to patients and customers alike. More than 50% of Sempre patients have utilized the company's patented auto-refill submission feature in the last 12 months, and they didn't have to leave their Messages app to do so. A simple, natural language exchange summons Sempre's discount information, refill reminders, and even personalized troubleshooting, contributing to the company's 95 Net Promoter Score¹⁴. Plain text is also a meaningful way for brands to better capture the voice of the patient, hearing from them often in their own words.

VOICE OF THE PATIENT

You have made it easier for me to be able to get and take my insulin regularly. The reminders to refill my prescription and also the lower costs have helped me so much.

Thank you the savings have really helped us in this day & time of high gas, groceries and everything much appreciated

In this economic time of high inflation it is really nice that there is a program that will help save money on my medications.



Creating a new category of **market access**

A new paradigm of market access is here.

Sempre's impact on patients is self-evident, but the impact on a brand's P&L is equally noticeable. With nearly no marketing spend required to drive awareness, 10X higher enrollment, 3-4X higher adherence lift, and reduced GTN spend from Sempre's dynamic and personalized discounts, manufacturers working with Sempre are seeing significantly higher returns on limited brand dollars than ever before.



Sempre distinguishes itself from traditional copay cards and other affordability programs by employing innovative channels to connect with patients and by delivering personalized support. Unlike any other affordability option available, the Sempre program offers dynamic, patient-specific discounts.

GER BRENNAN
VICE PRESIDENT & COMMERCIAL LEAD, ESTABLISHED BRANDS
ORGANON

As adherence to high-value chronic disease medications continues to drive down medical utilization and Total Cost of Care, not only are Sempre brands in crowded classes differentiating, but payers are continuing to adopt the program at scale as well. Nearly 150 million commercially covered lives are represented by the health plans and PBMs on the Sempre platform today, and that number is expected to increase through 2025 as these validated outcomes and patient testimonials compound.



Sempre makes medications more affordable for patients while encouraging compliance, a practice that will improve overall health. At BC NC our pharmacy program seeks to take every opportunity we can to focus on overall health and favorable outcomes associated with medications. It's not just about ensuring there is access to safe and effective drug treatments for our members, but also ensuring those medications are having the desired effect, making an improvement on the patient's overall health status. Sempre's programmatic alignment to these organizational priorities paired with their flawless execution and superior member service has made for a great partnership.

SUZANNE TRAUTMAN
CHIEF PHARMACY OFFICER
BLUE CROSS AND BLUE SHIELD OF NORTH CAROLINA

No solution in healthcare has **ever succeeded** in the long run without aligning the many stakeholders in this complex ecosystem.

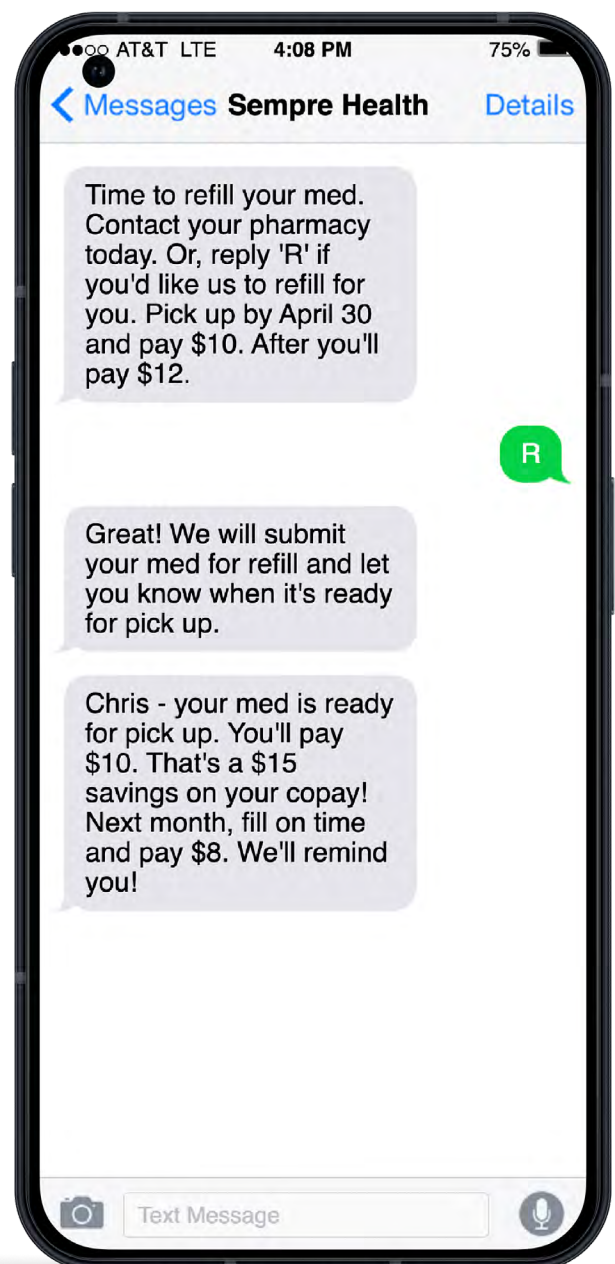
As the only market access option for brand teams in the past, copay cards have more than done their part to create a divisive and adversarial relationship between manufacturers, payers, and PBMs—with the patient often caught, distrustful and confused, in the middle.

**Meanwhile,
Sempre has
already changed
what market
access looks like.**



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