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Delivering Personalised Healthcare through Technology

Investor Presentation

6th December 2022

ASX: SHG

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Company Snapshot

Founded in 2017, **Singular Health Group Ltd** is an Australian-based medical technology company using emerging technologies to enable personalized healthcare with solutions such as fully-immersive 3D medical imaging, medical AI models, surgical design, and advanced manufacturing of patient-specific medical devices.

Company Highlights



own and develop medical imaging software, 3Dicom with a **510(k)** diagnostic clearance in USA for 3Dicom MD™ (October 2022)¹

Intellectual property portfolio with proprietary volumetric rendering platform (VRP), Medical file transfer protocol (MFTP), Cranial and Spinal AI models

A donut chart showing 25% completion, with the text '25%' in the center.

shareholding in Melbourne-based medical 3D printing facility

Recently established Global Partner Program with reputable sales partners now in USA & Switzerland to promote, distribute and sell 3Dicom software



Gained access to high barrier-to-entry market through recent regulatory approval and quality certifications.
Third party validation of software quality and provides basis for higher product pricing

481%

Annualised Growth Rate in Active Subscriptions

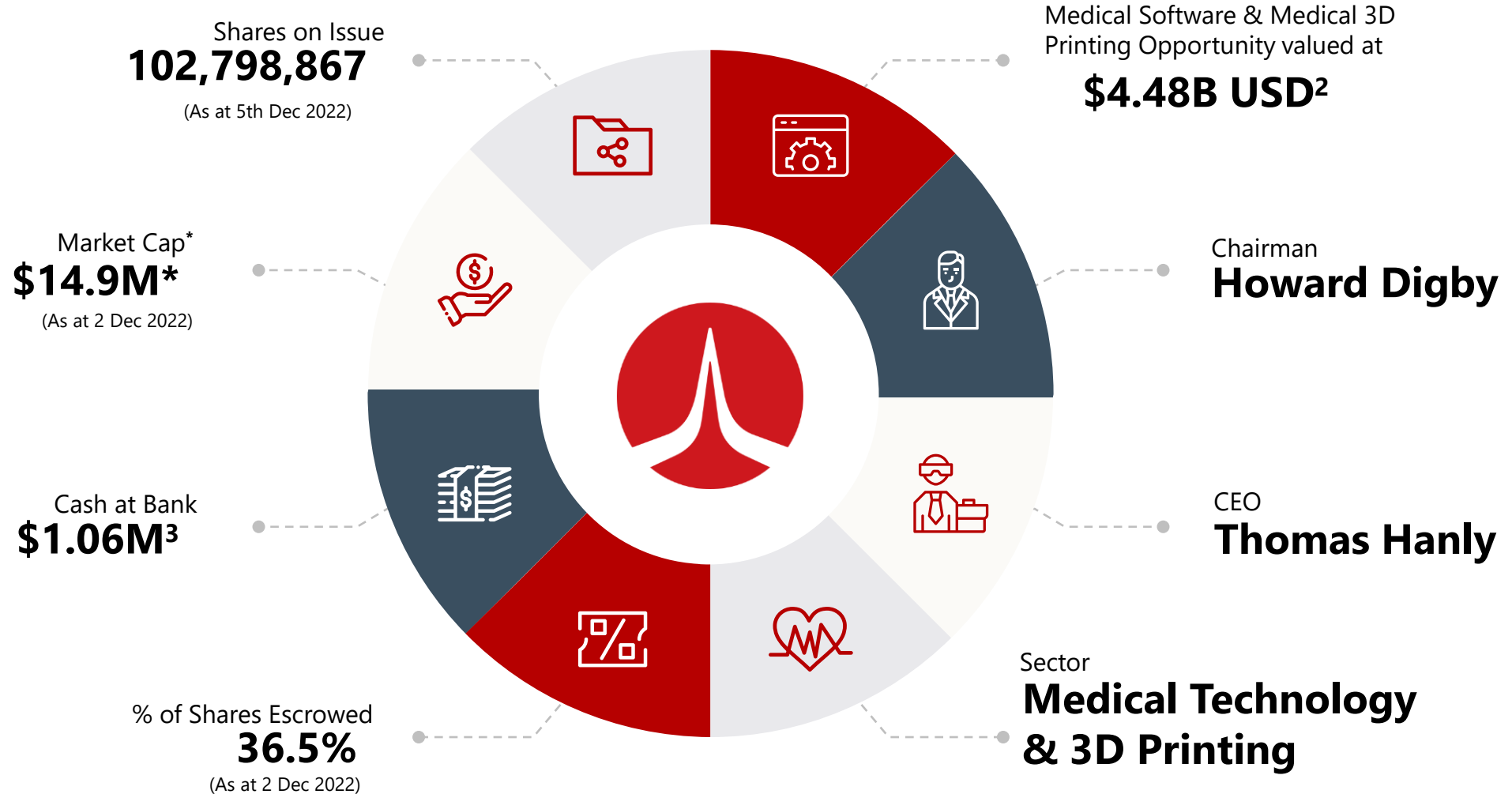
(as per November Stripe Metrics)



Strong sales pipeline and significant inbound interest in integrations & partnerships



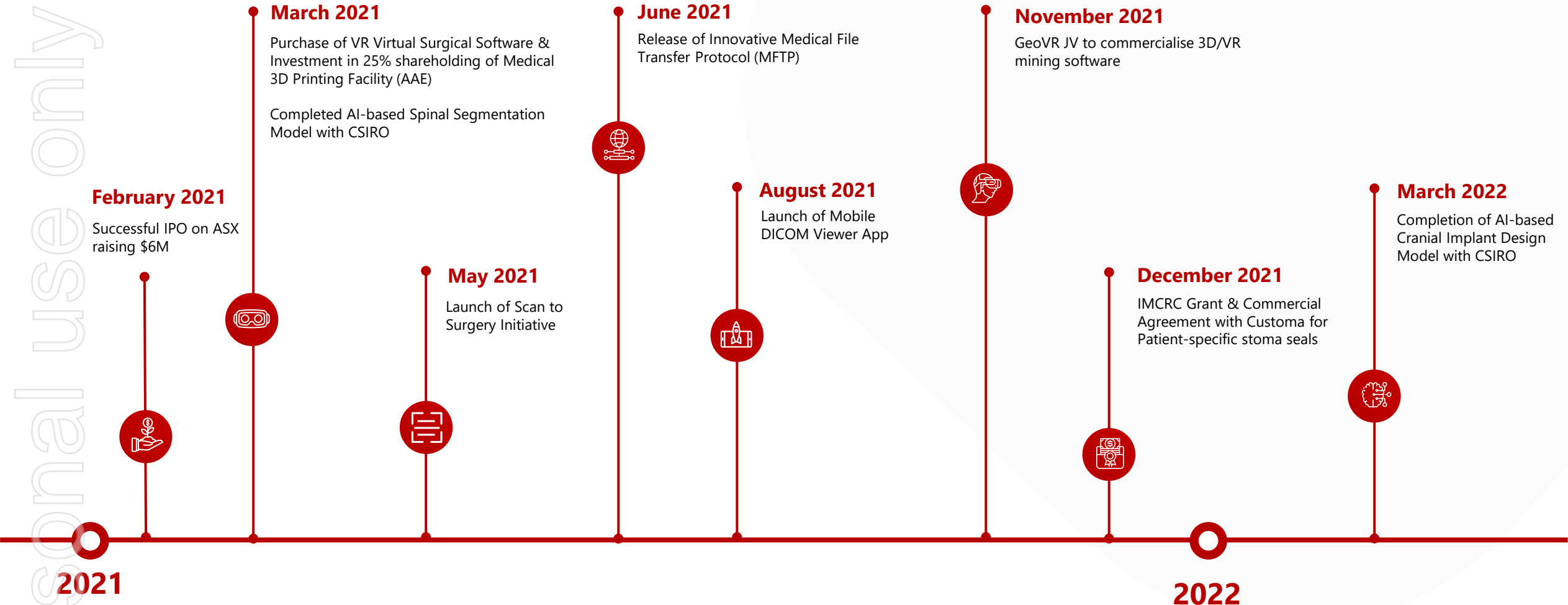
Company Snapshot





Timeline since IPO (Part 1/2)

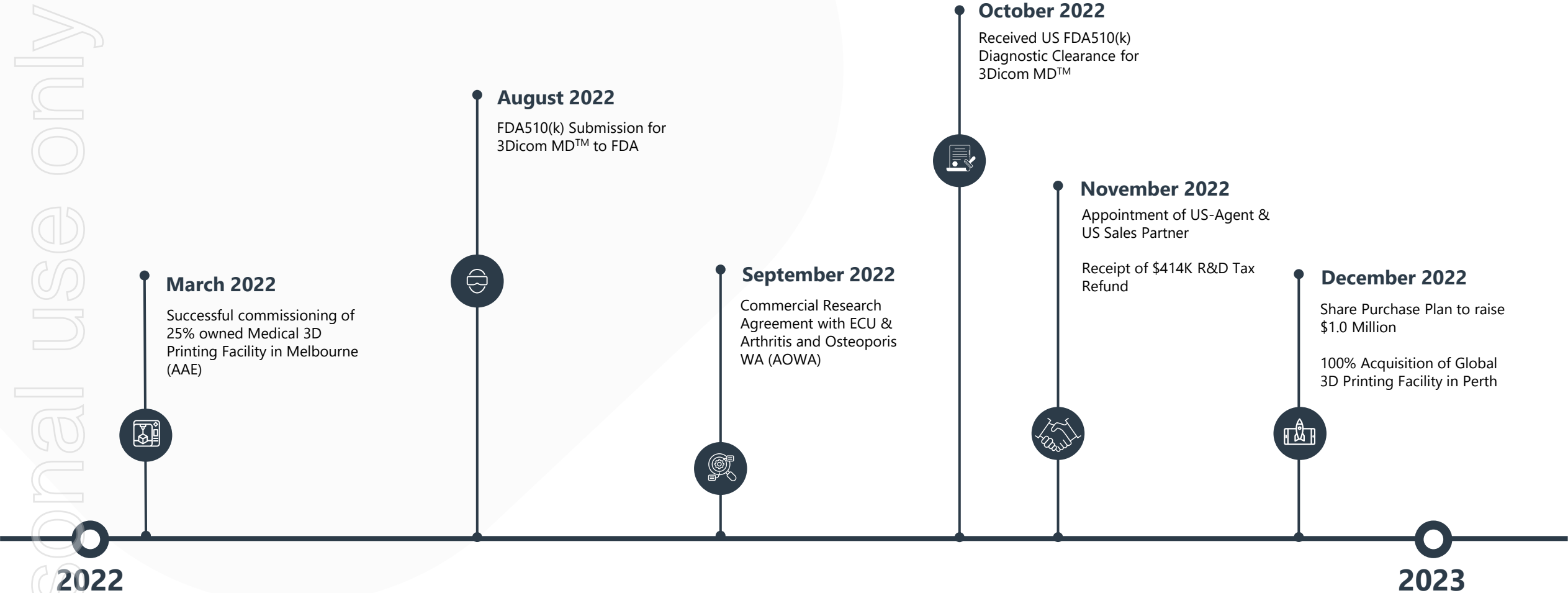
Research & Development Phase





Timeline since IPO (Part 2/2)

Commercialisation & Growth Phase



3DICOM MD™ – Collaborative Diagnostic Review*



Pricing



Monthly: USD\$49.95/month
Annual: USD\$399.95/year

Reimbursement⁴



Existing CPT codes identified for 3D review + remote consultations.

>\$25 per consult / review

Go-to-Market



B2B Partner Program &
Enterprise level sales
Direct to Consumers through Google
Ads, SEO & publications
Tradeshows, integrations, OEM

Total Addressable Market in US



6,093 US Hospitals⁵
201,927 Dentists⁶
34,920 Surgeons⁷
29,530 Radiologists⁸

Regulatory Strategy

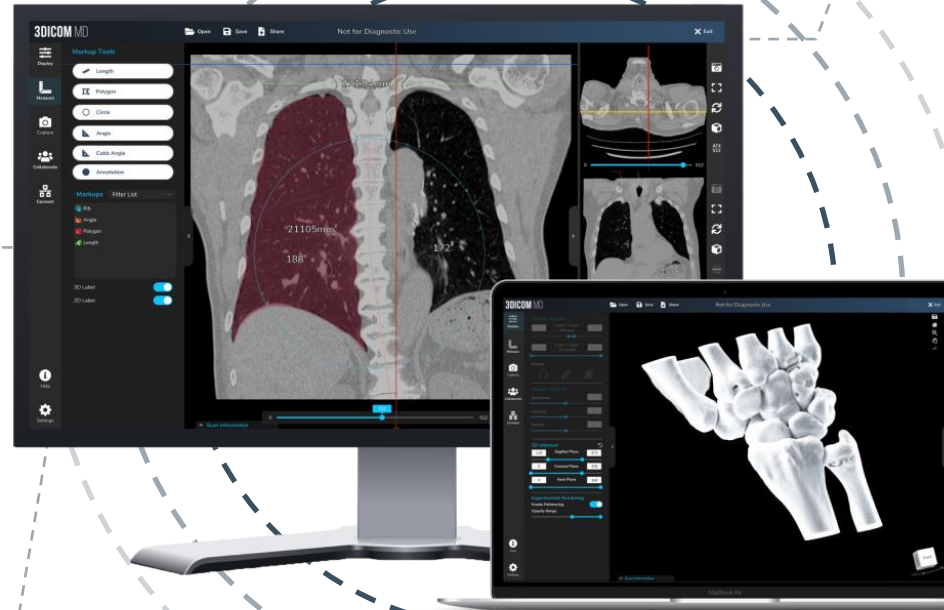


FDA510(k) cleared in US market
Targeting Health Canada, TGA
(Australia), and HSA (Singapore)
in H1 CY23.

Key Features



Rapid conversion of CT/MRI &
PET scans from standard 2D view to 3D
2D & 3D measurements and
annotations, combining common 2D
medical views with understandable 3D
models.



3DICOM Surgical – Medical Design Software*



Pricing



Monthly: USD\$249.95/month
Annual: USD\$1999.95/year

Reimbursement⁹



Existing CPT codes for 3D printed medical models + implants derived from 3Dicom Surgical software

Go-to-Market



B2B Partner Program & Enterprise level sales
Direct to Consumers through Google Ads, SEO & publications
Tradeshows, integrations, OEM



Total Addressable Market in US



29,590 Surgeons⁷
6,093 US Hospitals⁵
113 Hospitals with centralized 3D printing facilities (as at 2019)¹⁰

Regulatory Strategy



Targeting FDA510(k) clearance for US market in H2 CY23
Targeting Health Canada, TGA (Australia), and HSA (Singapore) in Q1 CY24.

Key Features



Segmentation features convert 2D images to 3D printable models
Medical Computer Aided Design (MCAD) allows for virtual surgical planning with pre-operative placement of screws, implants and other devices.

Scaling Singular Health– Enterprise Strategy



Appointment of Global Partnerships Manager

Joint Ventures in Macau, Singapore (SHG SEA), and GeoVR



Cost-effective representation at international trade shows in USA and Europe



Inbound enquiries for 3rd party integrations of AI models, hardware, and processes generated through SEO, international publications, and tradeshow attendance.



Collaborations with Osteopore (ASX:OSX), CSIRO (Kickstart AI Projects) & IMCRC (Customa Surface Scan Project)

Partner Program



Low CapEx; establishing global network of local medical device manufacturers and medical sales representatives. Tiered system allows for outreach and onboarding of SMEs as well as large OEMs.



**Schneider Digital Stereo 3D Display
Integration with 3Dicom**

Scaling Singular Health – Direct Sales Strategy



Global SaaS Management Platform

Singular Health has developed a proprietary, online subscription management platform for online purchases by Patients & Practitioners accessible globally and with full localization.



3rd Party Integrations & Add-Ons

The customer dashboard is integrated with the 3Dicom software to allow for add-ons, up-sells and anticipated AI-in-the-Cloud, cloud storage & scan sharing pay-per-use revenue models.



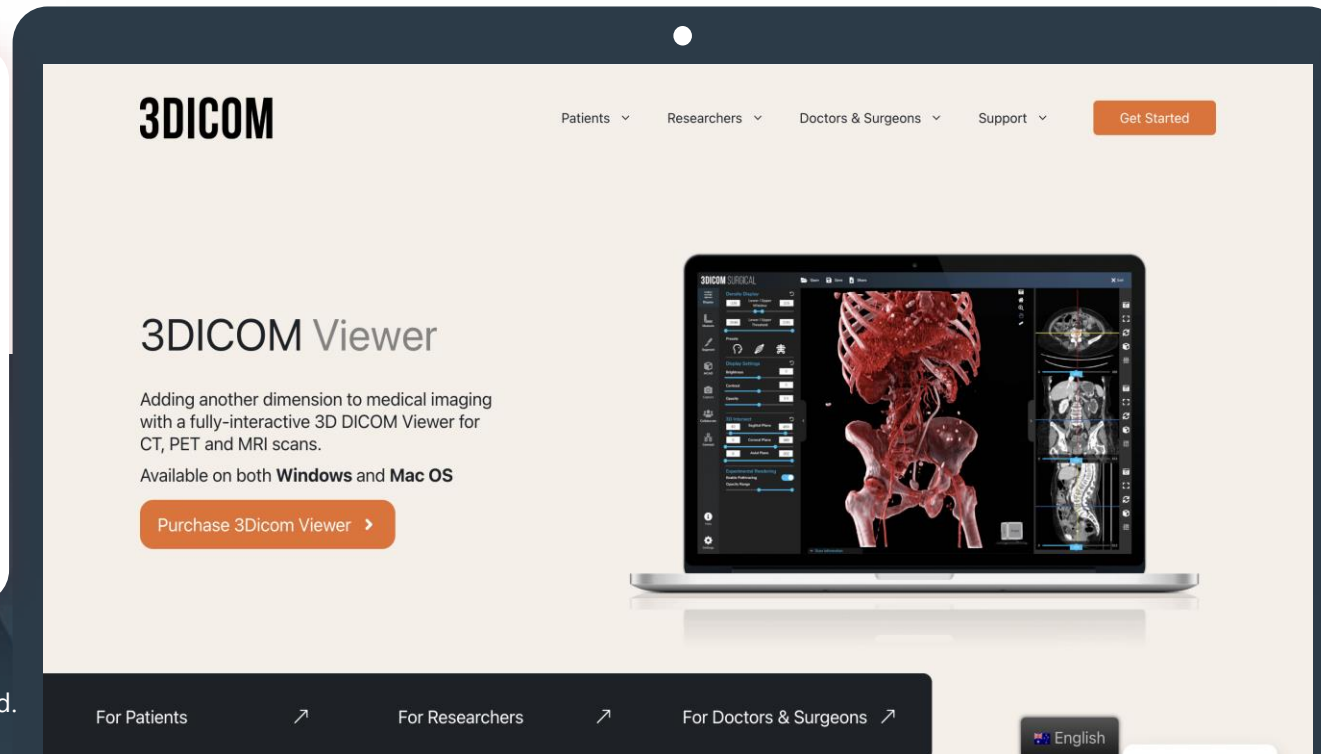
Affiliate & Partner Program Portal

3Dicomviewer.com online portal is also used by Affiliate & Partner Programs for enterprise sales and provides a centralized repository of promotional and training materials.



Promotion

- Search Engine Optimisation (SEO)
- Google Ads
- Referral Program
- App Store Listings



Current Subscription Metrics (Direct, Non-Diagnostic Sales)

- Active Subscriptions: 225+
- Lifetime Value (LTV): **AUD\$149.87**
- Cost to Acquire Customer (CAC): **~\$70**
- Churn Rate: **~5.76%** (targeting **3%** with recent improvements)
- Annualised Growth Rate: **481%**, without paid advertising or Partner Program.

Based on November 2022 Metrics

Localised Production with Global Scale



Personal use only

Kelyniam
(US Agent)

CG1 Solutions
(Sales Partner)

UK & Europe Presence
Local representation

Macau JV

Singapore JV

Corporate HQ
Software Development
Global 3D Facility

AAE Medical 3D
Printing Facility

Acquisition of Global3D – Medical 3D Printing



Global3D provides 3D printing services and design for both medical and non-medical applications.



Global3D generated gross revenue of AUD\$532,570 in FY2022



Well-established facility located in Bibra Lake, 20 km south of Perth, Western Australia



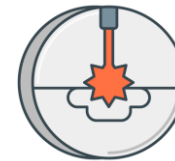
Currently 3D printing orthotics and prosthetics for clinics in Western Australia and New South Wales.



Summary of Acquisition Details

Initial tranche of 5,500,000 Singular Health with 60% at a 12 escrow and 40% on a 6-month escrow. An additional 900,000 shares based on revenue-based performance target within the first 12 months of operation.

Refer to the ASX Announcement entitled "*Singular Health acquires Global3D business and launches Share Purchase Plan*" for details of the transaction



Selective Laser Sintering



Fused Deposition Modelling



ColorJet Matrix Technology



Stereolithography

Scaling Global3D – Patient Specific 3D Printing



Australia's Prosthetics & Orthotics Market size was estimated at **USD\$208.87 million in 2021** and is expected to grow at a compound annual growth rate of **5.45%** to reach **USD\$287.30 million in 2021**¹¹



Patient Specific Ankle Foot Orthotics (AFOs)

- Australian podiatrists prescribe more custom AFO's than their counterparts in UK and New Zealand, roughly 4.4 per week per podiatrist¹²
- **~AUD\$120-\$300** per Ankle Foot Orthotic¹³



Build on Global3D's ISO 9001 and upgrade to ISO 13485 for medical devices.



Invest in additional polishing and colouring technology for patient specific check sockets and ankle foot orthotics (AFOs)



Patient Specific Check Sockets for Prosthetics

- Over **8,000** lower limb amputations occur per annum in Australia, requiring check sockets¹⁴
- Prostheses are typically replaced every **30 – 40** months requiring a new check socket¹⁵
- **~AUD\$450-\$1,000** per check socket¹⁶
- Targeting **5%** market penetration



Expand medical manufacturing capabilities and potential customer base with additional plant and equipment and by providing next-day shipping to South-East Asia and the East Coast of Australia.



Key Objectives in 2023



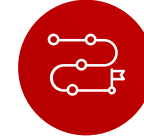
Regulatory

- Obtain Health Canada (Q1 CY23), TGA (Australia) (Q2 CY23), and HSA (Singapore) (Q2 CY23) Class II approvals for 3Dicom MD
- Receive US FDA510(k) clearance for 3Dicom Surgical allowing for design of patient-specific medical devices and guides
- Receive ISO13485 & Medical Device Single Audit Program Certification, allowing for regulatory approvals in US, Canada, Australia and Singapore.



Commercial

- Appointment of 10 sales partners and accelerate 3rd party integrations and enterprise agreements
- Achieve MRR of AUD\$40,000 and focus on increasing Lifetime Value (LTV) to Customer Acquisition Cost (CAC) ratio
- Minimise customer churn
- Joint marketing and US sales focus with CG1 Solutions



Product Roadmap

- Enhance Global3D product offering with investment in post-processing hardware (Q1 CY23)
- Focus on 3Dicom Surgical – medical 3D printing & design software (H1 CY23)
- Develop commercialised add-ons to increase average revenue per user – cloud storage, scan sharing (H1 CY23)
- Development of AI in the cloud with pay-per-use model, 3rd party marketplace and enterprise integrations (H2 CY23)



Corporate

- Identify and assess synergistic M&A opportunities
- Divestment of GeoVR asset
- Maintain relatively low cash burn and strong fiscal management



Investment Highlights

Following a year of foundation building, including obtaining first diagnostic regulatory approval, undergoing audits for ISO standards, commissioning the 25% owned Melbourne 3D printing facility, and establishing global sales partnerships, Singular Health is well positioned for revenue growth and a focus on commercialization activities in 2023.



Clear regulatory pathway now established and underway with **greater access to markets in 2023 through recent US FDA510(k) clearance for 3Dicom MD™**, and pending ISO13485 / MDSAP certification

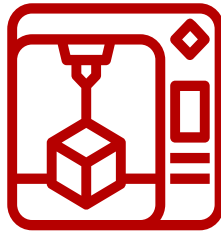
Significant enterprise interest in Singular's IP including the **Medical File Transfer Protocol** for cloud-based scan sharing, and **Cranial AI model** for accelerated medical device design

25%

owned 3D printing facility in Melbourne, commissioned in March 2022, **is fully operational**, and is currently **operating at high capacity**

3Dicom software offers **secure, local rendering of medical image** on Mac & Windows desktops, tablets, smartphones and Virtual Reality headsets, covering most modalities

Growing national and international presence and brand recognition with low-cost representation at numerous trade shows in 2022 and co-marketing in recent technical and commercial partnerships.



Newly-announced acquisition of Global3D's advanced manufacturing facility and **vertical integration with 3Dicom Surgical & R&D software** to provide **end-to-end Scan to Surgery workflow & diversified revenue streams**.

Strong financial and corporate governance and management with comparatively low cash burn and multiple revenue generating opportunities.



Sales partners in United States and Switzerland with imminent addition of sales partners in Southeast Asia and Latin America



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Appendix 1 – Board and Senior Management



Howard Digby

Non-Executive Chairman

With more than 25 years of experience in technology companies and with broad ASX experience from multiple ASX directorships, Howard has championed strong governance in his role as Chair of Singular's Board since the 2021 IPO.



Thomas Hanly

Managing Director & CEO

Having a strong background in funding, commercializing and successfully exiting R&D projects, Thomas is a seasoned Executive and has been instrumental in leading Singular Health since May 2019.



Andrew Just

Non-Executive Director

Previously the CEO of an ASX listed MedTech, and with significant senior executive experience in the healthcare industry in global companies, Andrew chairs Singular's Audit & Risk committee.



Denning Chong

Non-Executive Director

As one of the founders of Singular Health, Denning has been critical to the growth of Singular Health. An experienced lawyer, director, and investor, Denning provides strategic review and assists management in assessing risk and M&A opportunities.



Prof. Kwang Guan Tay

Executive Director of Research & Innovation

Holding a PhD from the Centre for Molecular Immunology and Instrumentation from UWA and an MBA from Murdoch University, Guan has spearheaded Singular Health's R&D and academic engagement initiatives since February 2020.



James Hill

Chief Operating Officer

Experienced in corporate finance, marketing and M&A, James was influential in product development and is instrumental in building the Company's regulatory, finance, and marketing foundations.



Thomas Morrell

Chief Technology Officer

Graduating from Staffordshire University with First Class Honours in CGI & Digital Effects, Thomas was responsible for developing Singular's core IP in 2017 and has led development at Singular Health since May 2019 as our CTO.



Dr Martina Mariano

Global Partnerships Manager

Holding a PhD from UWA and with a strong academic and entrepreneurial record, Martina is responsible for the creation of Singular's Partner Program and enterprise commercialization.

Appendix 2 - Scan to Surgery™



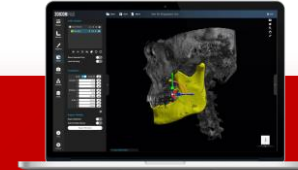
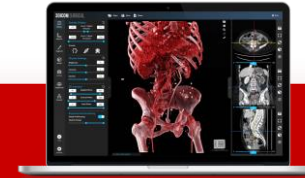
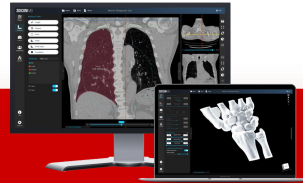
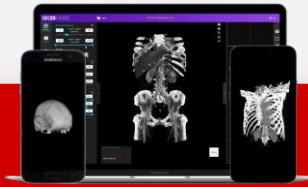
	SCAN	PACS	3D / VR Scan Review	Medical AI	Virtual Surgical Planning / Design	Manufacturing	Surgery
Description	Patient scan(s) taken using an existing CT, MRI, or PET scanner using the standard medical imaging format; DICOM.	Patient's scan(s) are stored and transferred using existing Picture Archiving Communications Systems (PACS)	Patient's standard 2D scan(s) is converted to 3D and/or VR model for patient education and/or diagnostic review* on mobile, desktop and/or VR.	Artificial intelligence models analyse images and segment anatomy, design implants and/or triage potential issues	Medical Computer Aided Design (MCAD) creates patient-specific procedural plans, surgical implants and /or guides	Advanced manufacturing processes make bespoke, complex surgical guides, implants, orthotics and /or other medical aids	Surgical teams use patient-specific procedural plan, guides, and/or implants for improved surgical outcomes
Current Target Market	Global Almost all existing CT, MRI and PET scanners output same file type	Global PACS globally all store DICOM files, and reports, and are interoperable	Global Patients (non-diagnostic) Doctors, Radiologists, Dentists, Specialists & Nurses	Global (pending approvals) Medical device designers, researchers, radiologists	Global (pending approvals) Medical device designers, researchers, radiologists	Global (localized hubs) ISO9001 and/or 13485 manufacturing facilities, medical manufacturers	Global (pending approvals) Surgeons, patient-specific device manufactures
Key Benefits	Singular Health's software works with standard, existing CT/MRI & PET scanners	Costly, sensitive server and IT infrastructure already exists to store and share files from scanners to 3Dicom software	Bridges gap between 2D views used by radiologists and 3D view better understood by doctors & patients for improved review and planning	Accelerates the processes of medical device design, anatomical 3D printing, and reduces workloads in radiology with triage tools	Faster, more collaborative surgeon-led design of patient specific implants and pre-planning of surgeries saves time for all involved	Localised, yet global, advanced manufacturing reduces lead times, waste, whilst producing unique medical devices	Patient specific guides & implants can be used for improved surgical outcomes & faster, more affordable surgical procedures
Current Singular Products / Services / Holdings	All 3Dicom Software works with outputs from existing scanners	3Dicom MD™* 3Dicom R&D 3Dicom Surgical**	3Dicom Patient 3Dicom MD™* 3Dicom Surgical** (anticipated in H2 CY23) 3Dicom R&D	Cranial AI Model Spinal AI Model	3Dicom Surgical** (anticipated in H2 CY23)	Global3D (100% Shareholding) Additive Engineering (25% Shareholding)	Patient-Specific Orthotics & Check Sockets 3Dicom Surgical** (anticipated in H2 CY23) Patient-specific Implants
End Goal	N/A	N/A	Creation of 3Dicom ecosystem with paid cloud storage, scan sharing, and viral / network effects with collaborative tools	Commercialize at scale pay-per-use medical AI-in-the-Cloud (AiC) platform with regulatory approved models	Collaborative pre-surgical planning, export of models & bespoke implants/guides to SHG manufacturing sites	Majority ownership of medical manufacturing hubs globally distributed for localized production	Deliver our own world-class patient specific surgical guides & implants to surgical teams globally
Commercialization Strategy	N/A - Singular Health leverages existing medical imaging hardware	N/A – Singular Health leverages and integrates with existing systems	In Market (May 2022) SaaS revenue model with direct online sales and subscription management for Patients (Non-Diagnostic) and Practitioners (Diagnostic). B2B 3Dicom Partner Program	In Development Per-per-use model through online AI-in-Cloud platform Licensing of SHG AI models to third party platforms	In Development - SaaS revenue model - License sales to medical device manufacturers - 3Dicom Partner Program - In-house design bureau	In Market (Dec' 22) M&A of established manufacturing facilities Standardise workflows & ISO Quality standards	In Market (Dec' 22) - Sale of 3Dicom MD™ (3D/VR Scan Review) or 3Dicom Surgical (Planning) - Sale of Patient-Specific Guides and/or Devices (Implants/Orthotics)

*3Dicom MD™ is currently able to be used for the above purposes in the the United States only where it is diagnostically cleared.

**3Dicom Surgical is anticipated to be able to be used for the above purposes following regulatory clearances.



Appendix 3 - 3DICOM Software Suite



Product	3Dicom Patient	3Dicom MD	3Dicom Surgical	3Dicom R&D	3Dicom XR
Description	Lightweight, local 3D DICOM viewer for Windows and MacOS, plus iOS and Android smartphones.	Medical imaging software for diagnostic review and real-time clinical collaboration	Medical device design software for DICOM segmentation and output of designs / models to manufacturing	Medical image analysis software for medical AI models & anatomical education	Companion wireless app on Oculus Quest 2 for immersive visualization in virtual reality
Product Maturity	Development Completed (Released as Non-Diagnostic)	Development Completed US Market entry in December 2022	In Development (Targeting FDA510(k) by Q3 CY23)	In Market, Ongoing R&D Projects	Development Completed (Released with 3Dicom R&D)
Target Customers	Patients who have undergone CT/MRI/PET medical imaging exams and want to understand and archive their scans for future usage	Medical Practitioners, primarily Radiologists, Dentists, Surgeons	Medical device manufacturers Surgeons & Surgical Teams ISO13485 Manufacturing Facilities	Researchers, academics, medical students, and medical device development teams	Engaged Patients Early Adopter Practitioners Medical Students & Educators
Core Benefits	Improved Patient Education	Diagnostic Review Patient Education	Faster, streamlined medical device design, review, and export to manufacturing facilities	Outsourced development of AI models, integration of 3 rd party plugins & medical CAD	Immersive visualization for enhanced patient and anatomical education
Regulatory Status	Non-Diagnostic Consumer Device No diagnosis or treatment planning provided by software.	Requires clearances as a Class II Software-as-a-Medical-Device (SaMD). Now diagnostically-approved in USA with FDA510(k) clearance.	Will require regulatory clearances as a Class II Software-as-a-Medical-Device (SaMD)	For research, scientific, and educational purposes only. No known regulatory approvals required to market.	Non-diagnostic, visualization only. Not regulated / Class 1 (depending on jurisdiction)
Marketing Strategy	Direct to Consumer – Search engine marketing and optimization Referral / Affiliate Program	Direct online marketing Tradeshows & Conferences Global Partnership Program	Direct online marketing Tradeshows & Conferences Global Partnership Program	Search engine optimization Direct email campaigns Academic publications	3 rd party integrations & partnerships
Revenue Model	Software-as-a-Service (SaaS) Annual Subscription only Pay-per-use scan sharing / storage	Software-as-a-Service (SaaS) Monthly or Annual Subscriptions Pay-per-use scan sharing / storage	Software-as-a-Service (SaaS) Monthly or Annual Subscriptions Per-per-use features & add-ons	Software-as-a-Service (SaaS) Subscriptions with pay-per-use features & accessories	Paid Add-On to 3Dicom Patient, R&D and Surgical with subscriptions

Appendix 4 - Regulatory Strategy



Approval	Status	Commercial Impact	Anticipated Timeline
3Dicom MD – US FDA510(k)	Granted (October 2022)	Major barrier to entry crossed with access gained to a significantly smaller competitive pool, higher prices compared to non-diagnostic patient market, and ability to appoint distributors.	Granted Q2 FY2022
ISO13485 & Medical Device Single Audit Program (MDSAP)	Audits Conducted Awaiting Certification	ISO13485 is a pre-requisite for TGA and EU-MDR regulatory approvals and to develop medical software for 3rd parties. MDSAP combines TGA, FDA & Health Canada audits to save both time and money each year.	Q1/Q2 CY2023
3Dicom MD – Health Canada	Requires FDA510(k)	Enables faster, cheaper submission to HSA (Singapore) & TGA (Australia) via Comparable Overseas Approval	Q2 CY2023
3Dicom MD (Singapore) via Comparable Overseas Approval	Requires FDA510(k) + Health Canada Approval	Singapore is a major medical training hub for South-East Asia and there is strong inbound demand for 3Dicom MD from clinics.	Q3 CY2023
3Dicom MD (TGA) via Comparable Overseas Approval	Requires FDA510(k) + Health Canada Approval	Ability to sell 3Dicom MD within Australian market, established demand from 4 years of relationship building.	Q4 CY2023
3Dicom Surgical (US FDA510(k))	Development Phase	True vertical integration to review, design, and/or export patient-specific implants. Lucrative market with limited number of competitors and none at same price point. Emerging markets need affordable, regulated solution.	Q3 CY2023

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