SERIES B INVESTOR PRESENTATION | JULY 2026

NovaBio Therapeutics

Precision Oncology via Targeted RNA-Editing Therapy

Dr. Elena Marchetti, CEO | Marcus Chen, CFO | Dr. Ravi Kapoor, CSO

Executive Summary

The Opportunity in Brief

- **Disease focus:** KRAS-mutant non-small cell lung cancer (NSCLC) and colorectal cancer (CRC) — combined addressable population >180,000 patients/year (US + EU5)
- **Platform:** Site-directed RNA editing (ADAR-mediated A-to-I) — **first-in-class**, no permanent genome change, re-dosable
- **Lead asset NB-401:** Phase II-ready; Phase Ib ORR **44%** in $KRAS^{G12D}$ NSCLC (n=27)
- **IP estate:** 34 granted patents across US, EU, CN; composition-of-matter exclusivity to 2041
- **Raise:** **$120M** Series B to fund Phase II/III and IND filing for NB-402 (CRC)

Series B at a Glance

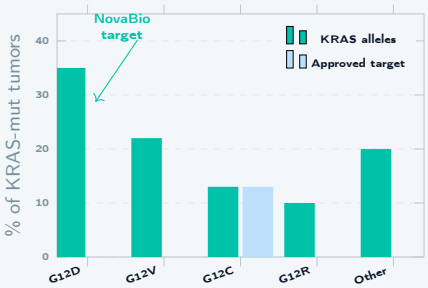
Raise	$120M
Use	Ph. II (NB-401), IND (NB-402), Mfg. scale-up
Pre-$	$480M
Lead	Arch Venture Partners
Close	Q4 2026
Runway	36 months to Ph. II readout

The Unmet Medical Need

KRAS: The "Undruggable" Oncogene is Still Killing Patients

KRAS Mutations Drive 25% of All Cancers

Cancer	KRAS mut. freq.
Pancreatic	95%
CRC	45%
NSCLC	30%



Limitations of Existing Approaches

Sotorasib/adagrasib: allele-specific (G12C only, ∼13% of KRAS)

Rapid acquired resistance at 6–12 months

No approved therapies for G12D (35% of KRAS mut.)

Mechanism of Action

Site-Directed RNA Editing — Reversible, Precise, Re-Dosable

SAFETY PROFILE

No off-target genome edits (WGS confirmed). mRNA editing is transient and self-limiting within 5–7 days.

DELIVERY

Lipid nanoparticle (LNP) optimized for IV & IT administration. Selective tumor uptake via EPR + EGFR-targeting ligand.

DIFFERENTIATION

Allele-agnostic platform; covers G12D, G12V, G12R simultaneously with a single compound class.

Clinical Pipeline

Four Assets Across KRAS-Driven Solid Tumors

Asset	Indication	Line	Stage	Next Milestone
NB-401	KRAS^{G12D} NSCLC	2L	III	Ph. II enrollment (Q1 2027)
NB-402	KRAS^{G12D} CRC	2L	II III	Ph. I data (Q3 2027)
NB-403	KRAS-mut PDAC	1L	Pre-clinical I	IND filing (Q4 2027)
NB-404	Pan-KRAS solid tumors	1L	Discovery	Lead cand. (Q2 2028)

Phase Ib Data — NB-401 in KRAS^{G12D} NSCLC

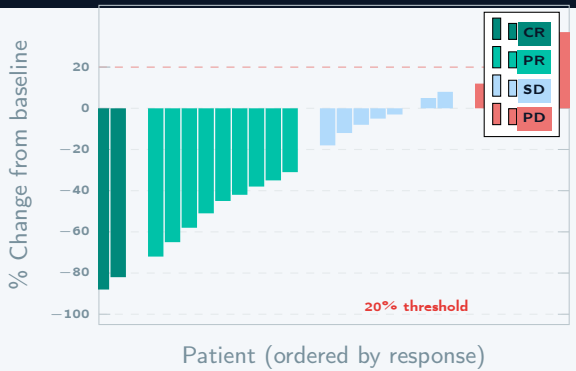
Compelling Early Efficacy Signal; Manageable Safety

Best Overall Response (n=27)

Response	n (%)
Complete Response (CR)	3 (11%)
Partial Response (PR)	9 (33%)
ORR (CR+PR)	**12 (44%)**
Stable Disease (SD)	8 (30%)
Disease Control Rate	20 (74%)
Progressive Disease (PD)	7 (26%)

Safety (Grade 3/4 AEs >5%)

AE	n (%)



Competitive Landscape

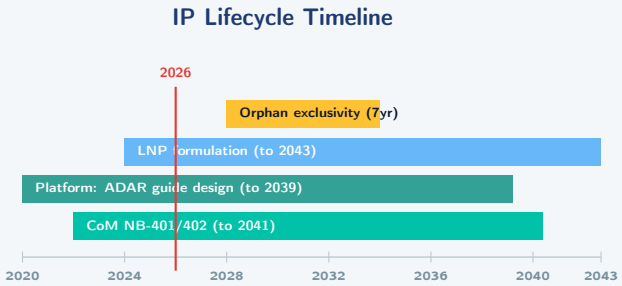
NovaBio Leads in Allele-Agnostic KRAS RNA Editing

Company	Modality	KRAS target	Stage	Allele cover.	Reversible	GS / Listed
NovaBio (us)	RNA editing	G12D/V/R	Ph. I/II	**Broad**	**Yes**	Private
Amgen (AMG-510)	Small mol. cov. inhib.	G12C only	Approved	Narrow	No	Meridex
Mirati (MRTX849)	Small mol. cov. inhib.	G12C only	Approved	Narrow	No	Meridex
Relay Therapeutics	Small molecule	G12C	Ph. II	Narrow	No	Meridex
Arrowhead Pharma	siRNA	Pan-KRAS	Ph. I	Broad	No	Meridex
BioNTech RNA Edit	RNA editing	G12D	Pre-clin	Narrow	Yes	Meridex

Intellectual Property Estate

Deep, Layered Protection Through 2041+

Category	Details
Granted	34 patents (US 18, EU 9, CN 7)
Pending	21 applications (PCT stage)
CoM	NB-401/402 composition granted
Platform	ADAR guide design (7 families)
Mfg.	LNP formulation process (4 patents)
Data exclus.	Orphan drug designation (PDAC)



Market Opportunity

Large, Growing TAM in KRAS-Driven Oncology

- KRAS oncology market projected to reach **$14.2B** by 2031 (CAGR 27%)
- NB-401 initial label targets **42,000** US patients/year ($KRAS^{G12D}$ NSCLC, 2L)
- Premium pricing supported: comparable to Sotorasib at $21,000/month. NovaBio target ASP: **$19,500**/month
- Probability-adjusted peak revenue at 30% US market share: **$4.8B** (2035)

Regulatory & Commercial Strategy

Accelerated Approval Pathway; Partner-Enabled Launch

Regulatory Designations Secured

- ★ **Breakthrough Therapy Designation** — FDA (NB-401, June 2025)
- ★ **PRIME Designation** — EMA (NB-401, Sept 2025)
- ✓ **Orphan Drug** — FDA & EMA (NB-403, PDAC)
- ✓ **Fast Track** — FDA (NB-402, CRC)

Commercial Model

Build focused US oncology sales force (60 reps; top 200 cancer centers)

Regulatory Milestones

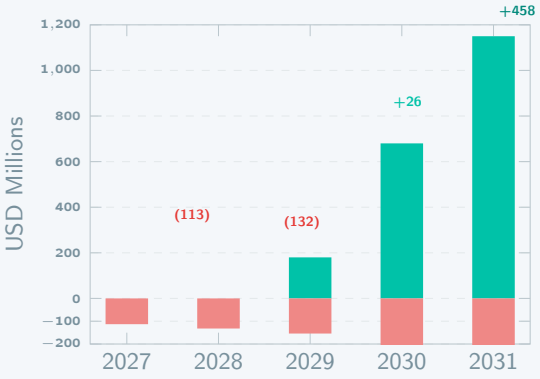
- **2030** — FDA approval target; EU MAA
- **2028** — Phase III SPA; NDA rolling submission begins
- **2027** — Phase II interim readout (ORR primary)
- **2026** — Phase II enrollment complete (n=180)
- **2025** — Phase II SPA agreed; PRIME designation
- **2024** — Phase Ib data (n=27); BTD granted

Financial Projections (2026–2031)

Path to Profitability by 2030; Strong Return Profile

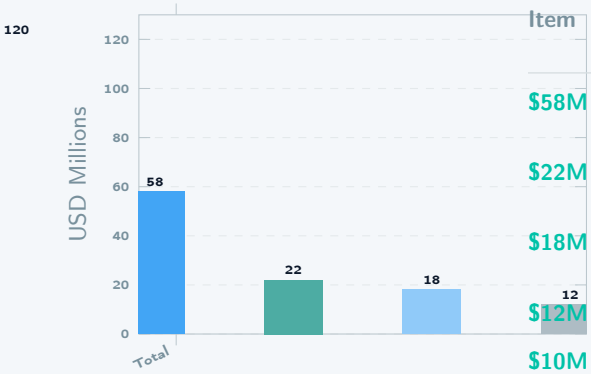
($M)	'27	'28	'29	'30
Revenue	–	–	180	680
R&D Opex	(95)	(110)	(90)	(85)
G&A	(18)	(22)	(28)	(35)
COGS	–	–	(36)	(102)
EBITDA	(113)	(132)	26	**458**
Cash / EoP	105	45	165	598

Key Assumptions: **NB-401 FDA approval Q4 2029. US ramp: 5% (2029), 18% (2030) market share. ASP $19,500/mo. Gross margin 80% at scale. No additional dilutive financing assumed post-Series B.**



Use of Series B Proceeds ($120M)

Capital Efficiently Deployed Across Clinical & Operational Milestones



Item	Allocation
$58M	Ph. II trial (NB-401); 18 sites, 180 patients, 30 months
$22M	Manufacturing scale-up; GMP suite buildout (CDMO)
$18M	IND-enabling studies for NB-402 (CRC); Ph. I start
$12M	G&A, regulatory, legal, IP prosecution
$10M	Strategic reserve & partnership diligence

Total: $120M | 36-month runway to Phase II readout

Leadership Team

Seasoned Operators with Proven Track Records in RNA & Oncology

Dr. Elena Marchetti — CEO

Former SVP Oncology, Genentech (10 yrs). Led approval of 3 oncology products (FDA/EMA). Co-founder, Radius Bio (acq. Helvetia Bio $1.8B, 2021). MD/PhD Harvard; Boards: AACR, BIO.

Dr. Ravi Kapoor — CSO

Pioneer in site-directed RNA editing; 140+ publications; h-index 62. Former Broad Institute/MIT faculty. Inventor on 28 of NovaBio's granted patents.

Board & Scientific Advisors

Dr. Anne Wilson	Nobel Laureate, RNA Biology; Stanford
James Park	GP, Arch Venture Partners
Dr. Carlos Ruiz	Former FDA CDER Director; Regulatory
Sarah L. Kim	Commercial; former CCO, Blueprint Medicines
Dr. Priya Sharma	CMO; Oncology KOL, MD Anderson

Existing Investors

THE ASK

$120M Series B

To advance NB-401 through Phase II, file IND for NB-402, and position NovaBio for a 2028–2029 licensing event or IPO.

$120M	36 mo	Ph. II ORR	2028–29	$4.8B
Series B	Runway	Primary endpoint	Catalyst window	Peak revenue

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