

Addressing a high public health priority in the post-Roe world



- Recent Roe v. Wade development makes the need for highly effective birth control more urgent than ever. To address this need, ARSTAT develops the first-ever oral contraceptive for women with above-normal weight.
- Thirty million US women search for reliable birth control, and 20 million of these women are overweight or obese. By far the most popular method, oral contraceptives do not work well in this population due to poor efficacy and troublesome side effects. The ARSTAT's lead product – Nuvocept™ – will return the pill to these women as a trusted and safe option, significantly reducing the number of unwanted pregnancies.
- At the pre-IND meeting, the FDA recognized the unmet need, accepted Nuvocept efficacy and safety projections, confirmed its **Phase III-ready** status, and endorsed a pathway to **an unprecedented label for women with high BMI**. Protected by **six US patents and an EU patent**, Nuvocept is < \$20M and 3.5 years away from FDA approval. Top experts consider Nuvocept a > \$2B/year US opportunity. Strong ex-US sales are also expected.
- The patents are authored by the Founder and Acting CEO, Arkady Rubin, Ph.D., a 30-year pharma veteran (J&J, Pfizer), a co-inventor of Ortho Tri-Cyclen Lo, one of the best US pills with peak annual sales of over \$500 million.
- Nuvocept will be advanced by a highly experienced team with a strong track record in women's health

Other ARSTAT Products



- **Premring™ (Phase IIb asset)** – **First-in-category** vaginal ring for uterine fibroids & endometriosis (~14 million US women). Drug delivery directly to affected tissues could be a **breakthrough solution**. **Two US patents**
- **Enhanta™ (Phase IIb asset)**– **First-in-category** single non-hormonal therapy for painful and heavy menstrual periods (>25 million US women). A likely first-line for a common disorder. **Three US patents**
- **Ducept™ (Phase III-ready)**– **First brand** that meets the consensus criteria of an ideal oral contraceptive. A great product for >2 million US normal-weight pill users; **minimal R&D costs**. **A US patent and an EU patent**

Current Funding Needs



- ARSTAT Pharmaceuticals is raising \$5M (Series A equity financing, priced round) to support the R&D ahead of a public offering 6-12 months later. The investors will receive 20% of the company's equity. This round is deeply discounted relative to the projected IPO valuation, offering potentially strong ROI.
- The company will use the proceeds to finalize the executive team, conduct two additional pre-IND meetings, file one or two INDs, complete comprehensive marketing assessments, and support IPO-related activities.

Business Model: Roadmap and Strategic Objectives



1 Complete the \$5M round	2 IPO (near-term exit in ≈1 year): 4-5x ROI
Continue R&D, finalize the team, and support the IPO	Conservative projections of the IPO metrics
3 Complete planned programs (3-3.5 years)	4 EXIT (3.5 years): 25-30x ROI
Advance Nuvocept/Ducept up to the FDA approval. Initiate Phase III studies of Premring and Enhanta	Assuming <50% of the portfolio Net Present Value (NPV) after the completion of the planned R&D activities



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