



TSXV: AVCR

# The Path Forward

*UK expansion at the point of inflection*

50

Technology Fast 50  
2024 CANADA  
COMPANIES-TO-WATCH WINNER  
Deloitte.

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*13 years of building. The UK is now validating everything.*

## Pilots Proven

- Strategic partnership with Barts Health NHS Trust (BHT)
- 556 patients screened across North East London (NEL) Integrated Care Board (ICB)
- 20% identified with elevated cardiovascular (CVD) risk
- UCLPartners [evaluation](#) confirms clinical impact

## NHS Is Buying In

- BBC National News [coverage](#)
- Chief Pharmaceutical Officer engagement
- British Heart Foundation (BHF) funding secured through BHT
- All pharmacy graduates qualify as independent prescribers from Sept. 2026

## Scaling Now

- BHT pilots expanding
- HbA1c (diabetes) live Q1 2026
- UACR (kidney function test) launching Q3 2026
- 75+ NEL sites deploying
- North Central London (NCL) already live

*National adoption is no longer a question of "if" – it's "when."*

## 3,350+

### Patients Tested

Across NEL + NCL  
pharmacies (to date)

## 1 in 5

### Elevated CVD Risk

QRISK score  $\geq 10\%$   
identified through screening

## 700

### Analyzers Staged

Deployment-ready across  
expanding London ICBS

## \$385K

### BHF Grant to BHT

Funded Inclisiran pilot for  
secondary prevention in pharmacy

## Independent Validation

*Community pharmacy CVD screening delivers up to £7.50 return per £1 invested, with the fastest payback of any intervention – within 1 year.*

– NHS Confederation

*“The findings demonstrate not only the feasibility and acceptability of this model, but also its significant potential to improve long-term cardiovascular outcomes and reduce inequalities... a strong foundation for sustained scale-up.”*

– UCLPartners Interim Report

*“We’re moving more NHS services from hospitals into the local community, in places like community pharmacies – it’s more convenient for patients, and a much cheaper and more efficient way to provide healthcare services.”*

– Darren Jones MP, Chief Secretary to the Prime Minister

# Near-Term Catalysts

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*What's expected in the next 6–18 months*

**Q2 2026**

- Current pilots expand to 100+ pharmacy sites
- HbA1c testing activated across network
- Full UCLPartners evaluation underway

**Q3 2026 -  
Q1 2027**

- Monthly subscription fees go live
- UACR (kidney screening) pilots launch
- ICB commissioning plans announced

**Q2-Q3 2027**

- Full commissioning across London ICBs
- Target 500+ active UK locations
- Return to profitability

**2028+**

- Expanding national rollout (25% ICBs)
- Target 1,000+ active UK locations
- European market exploration begins

# UK Revenue Model

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*Per-location economics at Phase 2 commissioning (CAD at 1.86 FX)*

## Revenue Streams

**Monthly System Margin** ~49% gross

Turnkey solution (analyzer, platform, EQA)

**Reagent Margin** ~34% gross

Lipids, HbA1c, UACR test consumables

**Control Margin** ~27% gross

QC supplies (quarterly purchases)

**Tests per Location** ~2.7/day

Lipids + HbA1c + UACR (average)

## Blended Per-Location / Year

System Fee Revenue \$1,562

Reagent Revenue \$12,118

Control Revenue \$1,404

**Total Revenue** **\$15,085**

Total COGS (\$9,865)

**Gross Margin** **\$5,221**

Gross Margin % ~35%

Based on commissioning-phase assumptions. Excludes corporate overheads.

# Growth Roadmap

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## NHS England rollout milestones (annualized CAD)

Phase	Scope	Sites	Run rate revenue	EBITDA	Market	Full Deployment
<b>Current</b>	Pre-commissioning: Pilots + planned expansion	100	<b>Pre-comm.</b>	–	London	Q2 2026
<b>Phase 1</b>	London ICBs	250	<b>~\$2.8M</b>	–	London Core20	Q2 2027
<b>Phase 2</b>	10% England	500	<b>~\$7.5M</b>	<b>~\$1.7M</b>	1,700 pharmacies	Q3 2027
<b>Phase 3</b>	25% England	1,000	<b>~\$15.1M</b>	<b>~\$3.4M</b>	2,700 pharmacies	Q1 2028
<b>Phase 4</b>	50% England	2,500	<b>~\$37.7M</b>	<b>~8.6M</b>	5,400 pharmacies	Q4 2028
<b>Phase 5</b>	100% England	5,000	<b>~\$75.4M</b>	<b>~\$17.2M</b>	10,000+ pharmacies	2029+

Revenue and EBITDA based on internal financial model (CAD at 1.86 FX). Addressable market: 10,835 pharmacies across 42 NHS England ICBs.

Run rate revenue = projected annualized revenue once Phase is fully deployed and operational for 12 months.

# Capital Structure

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## Key Metrics

Shares Outstanding **~101.3M**

Market Cap **~\$7.6M**

52-Week Range **\$0.035 – \$0.090**

2024 Revenue **\$4.79M**

2024 Revenue Growth **+37% YoY**

2024 Gross Profit Growth **+56% YoY**

Exchange **TSX Venture**

*2025: Transition year – exited Canadian retail, pivoted to UK NHS model*

## AVCR Highlights

- Micro-cap with validated NHS platform
- 4 consecutive years of revenue growth
- 3 tests going live (Lipids, HbA1c, UACR)
- BBC News covered NHS programme
- Independent UCLPartners evaluation positive
- Massive UK addressable market (10K+ pharmacies)

Options outstanding: 10,901,000 (\$0.15 - \$0.029) through 2029



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# Let's Talk.

We're at the inflection point. The pilots are proven, the NHS is backing this model, and we're ready to execute on what's already in motion.

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