



Agenda

Opening remarks by CEO

- CEO statement
- Highlights 2018

Full year 2018

- Key figures ORIOR group and segments
- Consolidated income statement and balance sheet
- Dividend

ORIOR 2020 strategy

- Value creation model
- Strategic pillars and overview of projects and measures

Outlook

- Environment and market, ORIOR focus and outlook

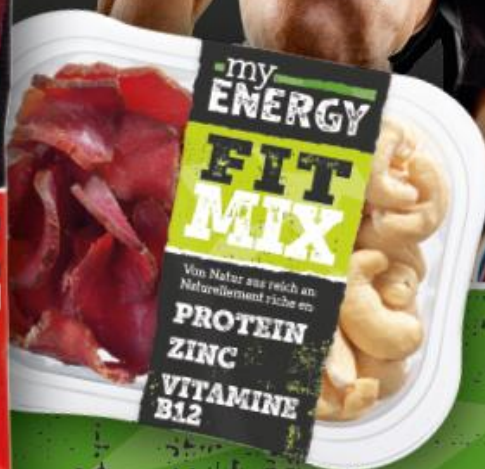
CEO statement

2018 an operationally successful and strategically direction-setting year

- Good operating performance
 - Broadly based growth carried by all segments.
 - Strong innovation in products, concepts and services.
 - Champion Model: intradisciplinary collaboration on many initiatives, measures and concepts.
 - Persisting challenging environment with volatile raw material prices and intense competitive and pricing pressure.

- Direction-setting strategic positioning and organisation of the Group
 - Acquisition of organic pioneer Biotta adds a new category in the niche of organic vegetables and fruit juices.
 - Interest in Casualfood marks our entry into a growing food service to-go niche.
 - New management structure across the enlarged organisation.

my ENERGY



Von Natur aus
reich an Protein

albert-spiess.ch

Albert®
Spiess
SEIT 1906



PURE by Pascale Naessens



BBQ party for veggies

Here vegetarians can enjoy a
sausage without a problem.

*Vegetarian treats
from the barbecue
with real, appetising
grill stripes.*



Pure Ticino



NEW



Biotta®

The Swiss Organic Pioneer

Oklahoma Steaks

Smoked Bacon


Fürstentümer
Spezialitäten®

*All it takes to
be a
WINNER!*



Fresh convenience brand
«Le Patron» rolled out
in Belgium



Meer tijd om te genieten
Le Patron
Savourez votre temps libre

CEO statement

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New category in the niche of organic vegetables and fruit juices.

New category in the niche of organic vegetables and fruit juices.

The Swiss Organic Pioneer



The image displays three bottles and a box of Biotta beverages. The first two bottles are labeled 'Biotta PUR' and '100% sweet drink' and '100% sparkling drink' respectively. The third bottle is labeled 'Biotta ESSENZ INGWER' and 'ginger drink'. The box is labeled 'Biotta ESSENZ' and 'INGWER DRINKSAFT'. A red flower is placed next to the box.

An advertisement for Biotta Veggie drinks. On the left, a man in a blue jacket is smiling. In the center, four bottles of Biotta Veggie are displayed: 'VEGGIE' (green), 'VEGGIE' (orange), 'NEW Biotta VEGGIE' (red, labeled 'GUANABANA'), and 'VEGGIE' (purple). The background on the right is a close-up of fresh vegetables like carrots and bell peppers.



www.biotta.ch
biottaCH

HAPPY HOURS FÜR IHREN KÖRPER.

Schluck für Schluck zu Ihrer Auszeit
rit der Biotta Wellness Woche.



Mit einer Biotta Wellness Woche erleben Sie in wenigen Tagen ein neues Körpergefühl. Gönnen Sie sich eine kleine Auszeit!

Sie erhalten die Biotta Wellness Woche in Apotheken, Drogerien, im Bio-Fachhandel und online.

Interest in Casualfood

Entry into a growing food service to-go niche



Snack carts

Grab & Go



Shops with fresh counters

Shop & Go



Full-service bars

Stay & Enjoy and Shop & Go



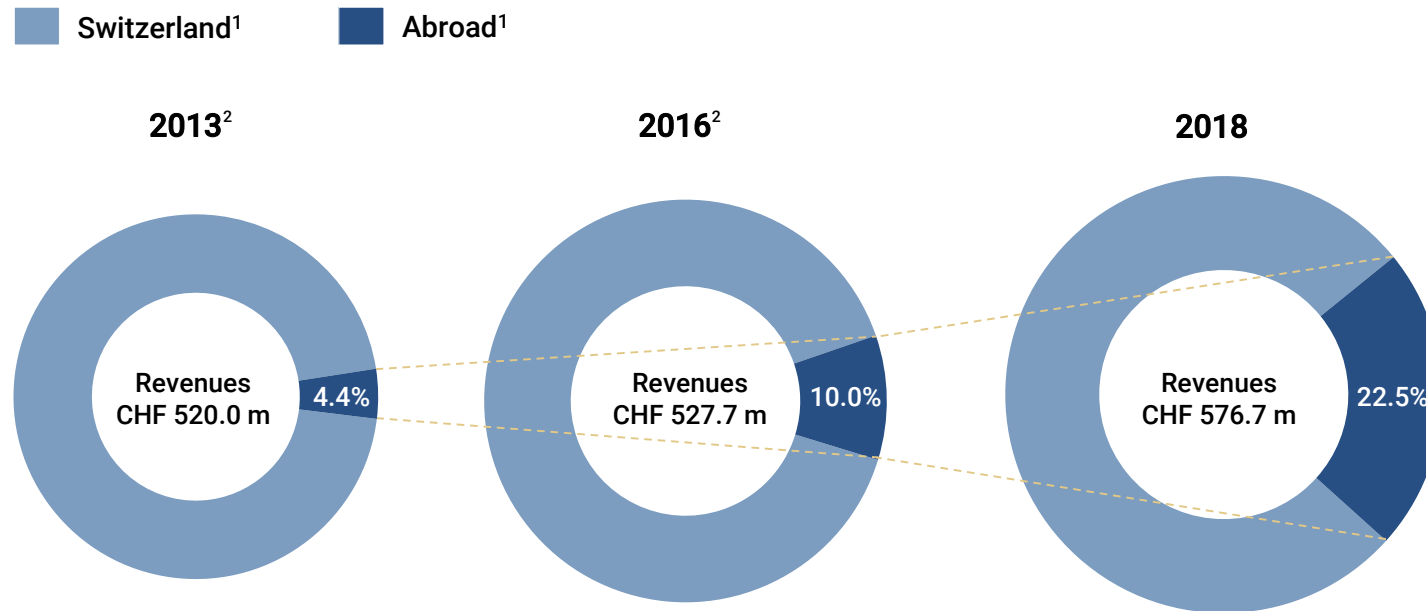
Strengthening of core competences and diversification

Direction-setting strategic move by the Group

Categories: leading positions in growing niches within our domestic and foreign markets.

Channels: from traditional retailers and discounters to food service providers.

Customers and countries: broad portfolio of local, regional, national and international customers.



¹ Revenue data is based on customer domicile.

² Reported revenues, i.e., excluding the effects of IFRS 15.

Strengthening ORIOR's management structure

New Extended Executive Committee



ORIOR in the context of ORIOR 2020 strategy goals

Rigorous execution of the ORIOR 2020 strategy

ORIOR in the year 2020

- 1 ORIOR remains a stable and financially strong food group. ✓
- 2 ORIOR has achieved solid growth in Switzerland including bolt-on acquisitions. ✓
- 3 ORIOR has steadily improved its operating results, supported by high cost efficiency. ✓
- 4 ORIOR remains the market leader in existing and new product niches. ✓
- 5 ORIOR is the most innovative food group in Switzerland and owns strong and unique brands. ✓
- 6 ORIOR is European. ✓
- 7 ORIOR offers shareholders an attractive dividend yield and has steadily increased its dividend payout. ✓

All implemented initiatives and measures with positive impact on all ORIOR 2020 targets

THE ORIOR
RESPONSIBILITY

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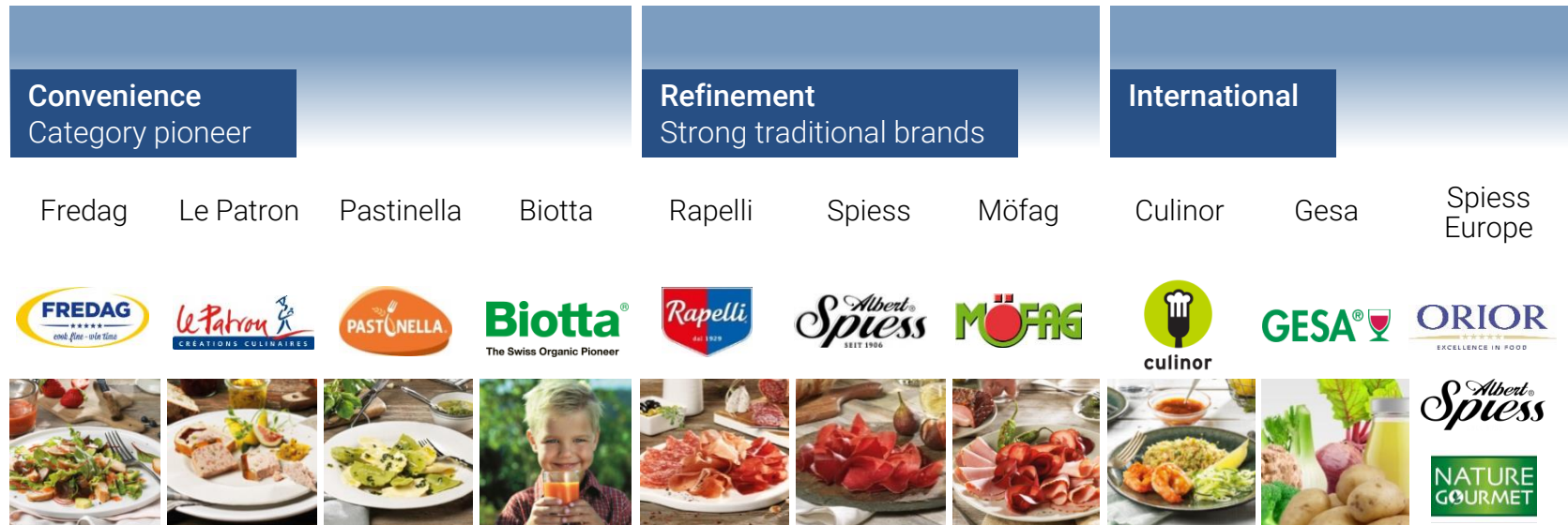
Outlook

- Environment and market, ORIOR focus and outlook

ORIOR segments

Three ORIOR segments divided into strong centres of competence

- Competence centre philosophy brings us closer to the market.
- Group-wide initiatives and Champion Model enhance our efficiency and agility.



- Biotta Group fully consolidated since 17 May 2018;
Biotta (CH) part of Convenience Segment, Gesa (DE) part of International Segment.
- Casualfood (DE), 35% interest, allocated to International Segment;
acquisition of majority interest and full consolidation scheduled for autumn 2019.

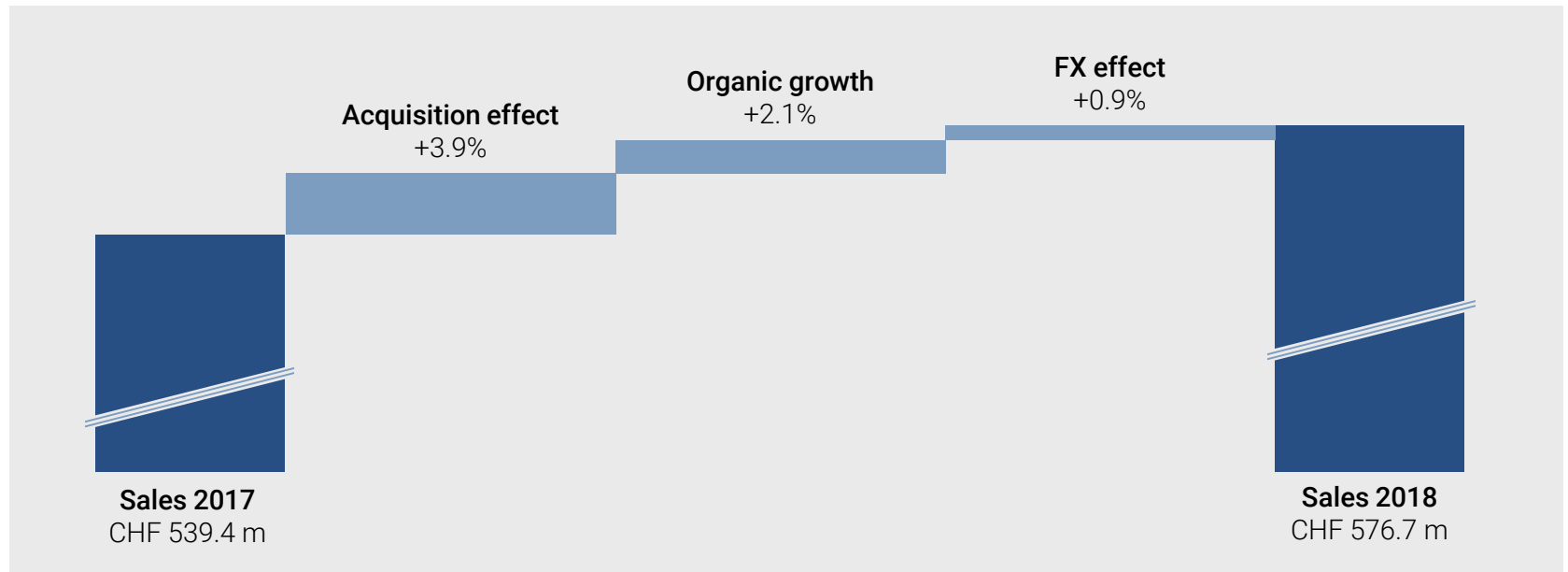
Key figures for 2018 fiscal year

Revenues	EBITDA	Net profit	Operating cash flow
CHF 576.7 m +6.9%	CHF 58.6 m +4.9%	CHF 31.8 m +25.8%	CHF 52.7 m -5.3%
Acquisitive 3.9%	EBITDA margin 10.2%	Net profit margin 5.5%	Cash conversion 90.0%
Organic 2.1%	EBITDA, adj.¹ CHF 59.3 m	+ 83 basis points	Cash conversion (Ø of past 4 years) 85.4%
FX effect 0.9%	EBITDA margin, adj.¹ 10.3% (- 6 bp)		

- Good operating performance; growth driven by all segments.
- Very good cash conversion and above average at 90.0%.
- Accounting standards switched to Swiss GAAP FER as of 31 December 2018: reduction in complexity/costs.
- Change in cash flow attributed to Biotta and high raw material prices.

¹ Factoring out transaction and other non-recurring costs associated with acquisitions.

Net revenues +6.9%



- Acquisition effect: Biotta consolidated since 17 May 2018.
- Organic growth of 2.1%
 - *Positive contribution from every segment, broadly based across the different channels and products.*
 - *Strong focus on innovation, brands and building customer strengthening relationships.*

Segment Convenience

Good performance at all centres of competence

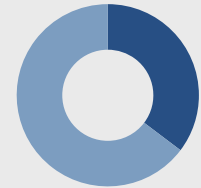
Revenues

Revenue growth of 14.1% to CHF 205.7 m

- acquisitive: 8.5%
- organic: 5.6%
- FX effect: 0.0%

Group share

Segment Convenience
as % of ORIOR Group:
35.3%



- Acquisition-led growth of 8.5% from Biotta, consolidated since 17 May 2018.
- Existing competence centres Fredag, Le Patron and Pastinella perform very well.
- General environment: high poultry prices and reduced yields in fruit and vegetables due to the hot, dry summer put the gross margin under pressure.
- Channels: growth from almost every channel, especially pleasing in food service channel.



Segment Refinement

Good growth, highly volatile meat prices

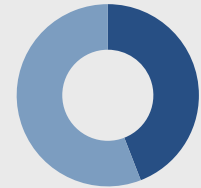
Revenues

Revenue growth of 1.4% to CHF 255.0 m

- acquisitive: 0.0%
- organic: 1.4%
- FX effect: 0.0%

Group share

Segment Refinement
as % of ORIOR Group:
41.0%



- Good fiscal year considering the highly volatile meat prices with 1.4% revenue growth.
- Performance driven by almost every channel.
- Very good performance from branded products: positive brand recognition and revenue trends continue.
- Ticinella shows great momentum thanks to more new product launches.
- General conditions on raw materials front challenging: gross margin under pressure.



Segment International

Strong growth, primarily due to Biotta acquisition and FX effect

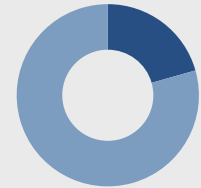
Revenues

Revenue growth of 10.4% to CHF 137.7 m

- acquisitive: 4.8%
- organic: 1.6%
- FX effect: 3.9%

Group share

Segment International
as % of ORIOR Group:
23.7%



- Acquisition-led growth of 4.8% from Biotta's subsidiary Gesa in Germany, consolidated since mid-May 2019.
- Gross margin squeezed by hot summer weather, which increased the cost of some raw materials such as apples and berries and reduced juice yields in vegetables.
- Methodical development of product portfolio and focus on sustainable margins: termination of an instant mashed potato contract due to insufficient margin.



*Albert
Spieß*

GESA® 

Consolidated income statement

in CHF million	2018	2017 ¹ Restated ²	Δ in %
Revenues	576.7	539.4	+6.9%
Cost of sales	-322.7	-298.9	
Gross profit	254.0	240.5	+5.6%
as % of revenues	44.0%	44.6%	-53 Bps
OPEX	-195.4	-184.6	
EBITDA	58.6	55.8	+4.9%
as % of revenues	10.2%	10.4%	-19 Bps
EBITDA adjusted³	59.3	55.8	+6.2%
as % of revenues	10.3%	10.4%	-6 Bps
Depreciation and amortisation	-23.0	-25.0	
EBIT	35.6	30.8	+15.5%
as % of revenues	6.2%	5.7%	+46 Bps

- Gross margin declined 53 basis points to 44.0% due to high meat and poultry prices
 - *Almost fully offset by cost discipline and improvement efforts throughout the value chain.*

¹ Restated prior year figures due to change from IFRS to Swiss GAAP FER.

² Restatement.

³ One-off transaction and extraordinary costs arising from the acquisition of Biotta.

Consolidated income statement | EBIT – profit

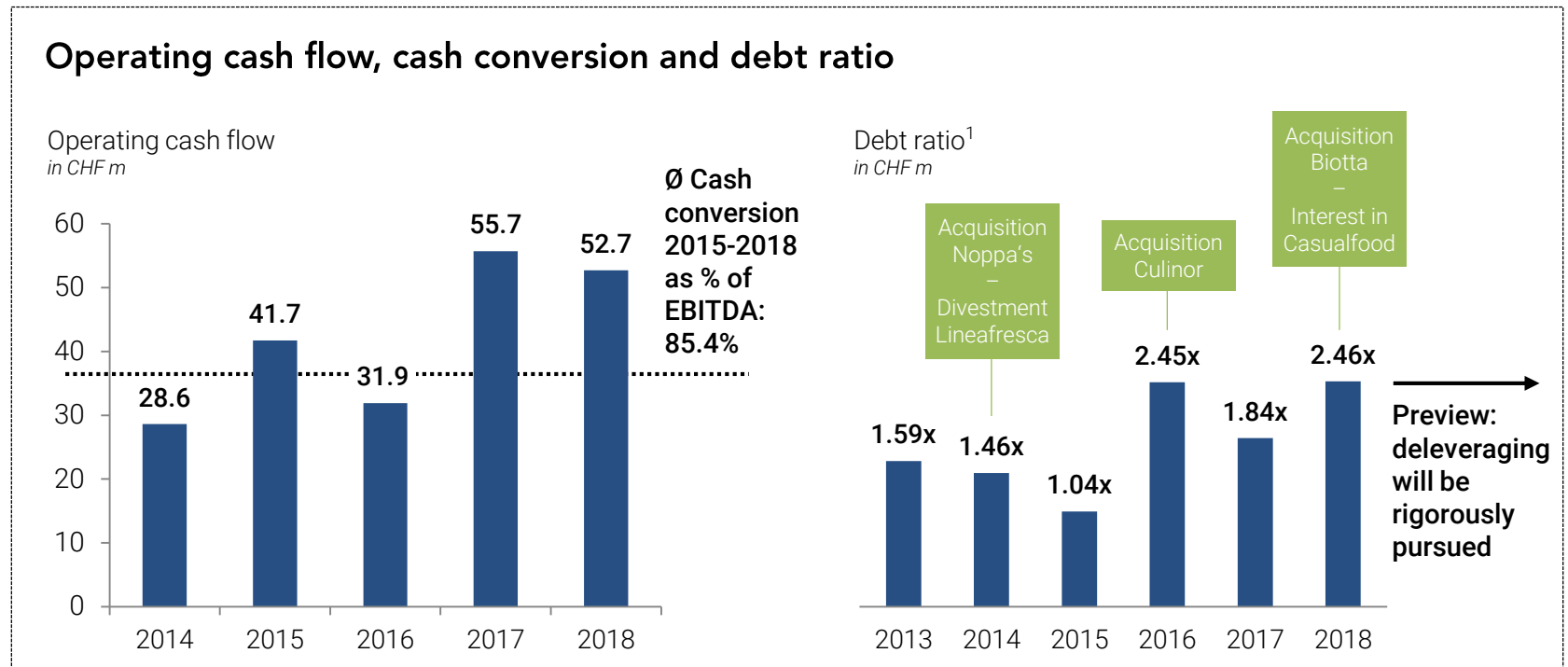
in CHF million	2018	2017 ¹ Restated ²	Δ in %
EBIT as % of revenues	35.6 6.2%	30.8 5.7%	+15.5%
Financial income/financial expense	–1.8	–4.9	
Pre-tax profit as % of revenues	33.8 5.9%	25.9 4.8%	+30.5%
Income taxes	–2.0	–0.6	
Profit as % of revenues	31.8 5.5%	25.3 4.7%	+25.8%

- Net profit plus 25.8%; primarily driven by good operating performance, optimised financing structure, favorable exchange-rate movements and positive, non-recurring tax effect.
- Earnings per share CHF 4.98 (2017: CHF 4.29).

¹ Restated prior year figures due to change from IFRS to Swiss GAAP FER.

² Restatement.

Strong cash conversion



- Cash flow of CHF 52.7 m; cash conversion of 90.0%.
- Ongoing deleveraging efforts.

¹ 2013-2016 basis IFRS.

Consolidated balance sheet

in CHF million	31.12.2018		31.12.2017 ¹ Restated ²	Δ in %
Net working assets	204.4	51.2%	183.1	53.3%
Property, plant and equipment	133.0		111.5	
Intangible assets	51.4		48.4	
Deferred tax assets	10.6		0.3	
Total assets	399.4	100.0%	343.3	100.0%

in CHF million	31.12.2018		31.12.2017 ¹ Restated ²	Δ in %
Total liabilities	309.7	77.5%	258.0	75.1%
Equity	89.7	22.5%	85.3	24.9%
Total liabilities and equity	399.4	100.0%	343.3	100.0%

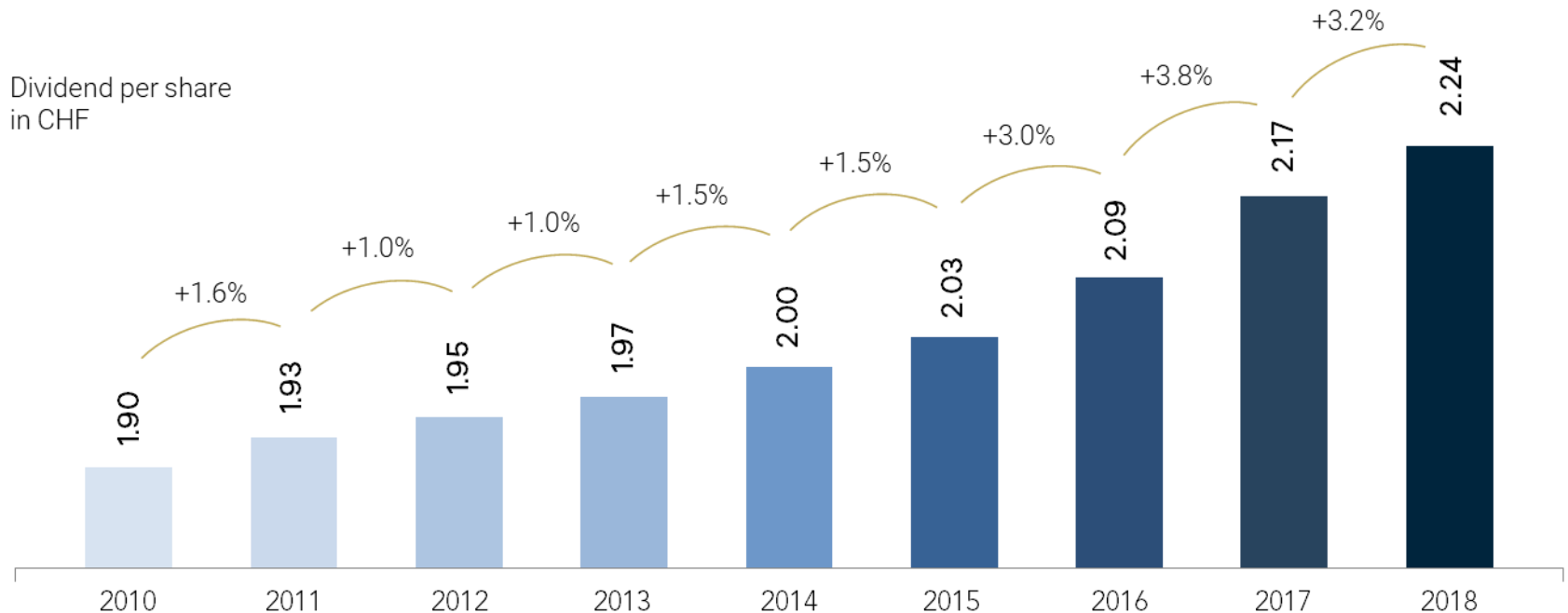
- Changes in connection with Biotta and Casualfood acquisitions.
- Adjustments in connection with change in accounting standards from IFRS to Swiss GAAP FER.
- Share capital increased by nearly 10%.

¹ Restated prior year figures due to change from IFRS to Swiss GAAP FER.

² Restatement.

Dividend history

- Long-term oriented, stable and attractive dividend policy: steady increase in the absolute dividend per share.
- Eighth consecutive increase in the dividend since the IPO.
Dividend of CHF 2.24 per share proposed. Paid out from capital contribution reserves and therefore exempt from withholding tax.



Clear financial targets underpin our strategy

Rigorous execution of our financial target system



Growth

Attractive niche markets

Portfolio mix

Margins

Performance improvement, operating efficiency and Group synergies

Cash flow

Capital efficiency

Performance controls and financial performance indicators cockpit

Organisation, leadership, performance management

- Average long-term sales growth of 1-2%.
- Steady increase in absolute EBITDA.
- Steady increase in absolute dividend.

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ORIOR 2020 strategy – goal: steady value creation

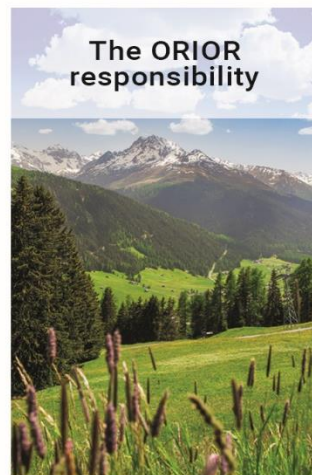
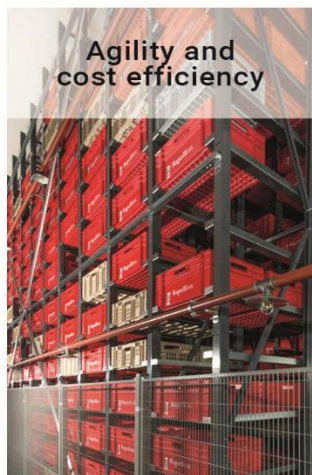
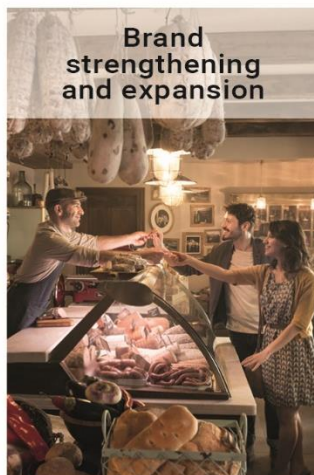
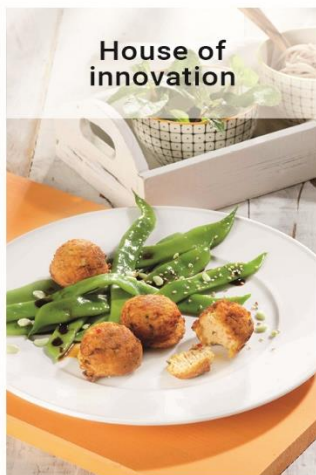


We want to steadily
create sustainable value

for our employees,
our customers,
our business partners,
the local communities and our
shareholders

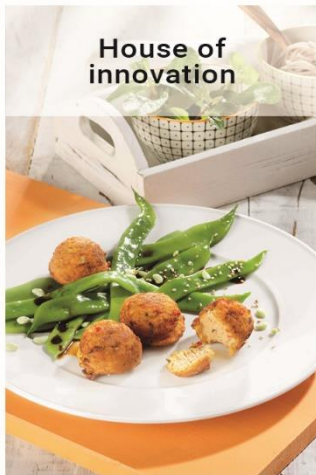
ORIOR 2020 – strategic pillars

ORIOR 2020 – our strategic pillars



House of innovation

- Consumer insights: identify new needs/trends at an earlier stage, gain a better understanding of hybrid consumers, food scouting.
- Concept innovations: new formats for established and new market niches, existing retail floor space and new sales channels, including new services.
- Category innovator thanks to competence centre model: focus, flexibility and speed (concept 30 days).
- Strengthen our innovation competence through the new organisation.

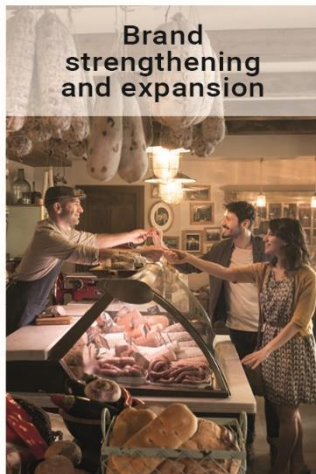


A snapshot of projects and measures under way

- *Interest in Casualfood: new possibilities and rapid adoption of trends, thanks to direct contact with consumers.*
- *"Biotta" vitality juices: Vital Plus, Vital Immune, Vital Iron, Vital Antioxidant*
- *Line extension: "myEnergy" Beef Chili, "myEnergy" Mix.*
- *Food is local: Terroir concepts "Ticinella", regional specialities, regional sourcing.*
- *Vegetarian novelties: BBQ specialities.*
- *Mr. Bacon: innovative extension of bacon line, e.g. with Oklahoma steaks.*
- *Superfoods, real fresh, natural: "PURE", "YOU" pasta dishes, veggie specialities, etc.*

Brand strengthening and expansion

- Better differentiation of core brands and increase brand awareness.
- Take advantage of modern communication tools to reach out to consumers more effectively and efficiently (social media, digital communications, etc.).
- Greater focus on in-store concepts that enable direct interaction with consumers at point-of-sale (impulse purchases).
- Selectively build and expand Group marketing capabilities (Champion Model).

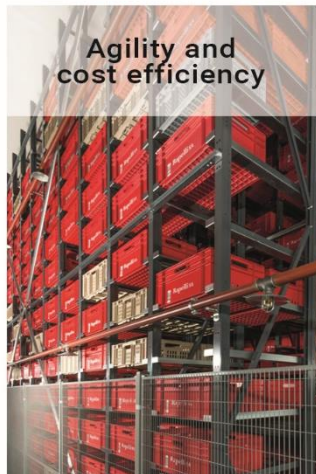


A snapshot of projects and measures under way

- Acquisition of Swiss organic beverage pioneer "Biotta" incl. other brands such as "Vivitz", "Traktor", "Bio-Energy" and "C-ICE". Modernisation plan for "Biotta" brand under way.
- Line extension with the successful "myEnergy" brand.
- New company-wide branding of "Le Patron"; also rolled out in Belgium.
- New brand visuals for "Pastinella"; launch of food service offering.
- New brand visuals for "Ticinella"; notable increase in brand recognition and brand revenues.

Agility and cost efficiency

- Strengthen competence centre model: flat hierarchies shorten decision-making processes and bring the organisation closer to customers and consumers.
- Take advantage of the Group's strengths:
 - Create efficiency advantages through common systems and processes and joint optimisation projects
 - Create know-how advantages with the functional Champion Model
- Continuous optimisation of production and process workflows.
- Continuous optimisation of product portfolios.



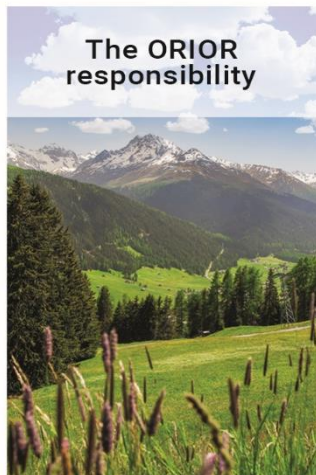
A snapshot of projects and measures under way

- *Champion Model; 12 workgroups.*
- *Successful introduction of IT roadmap at every centre of competence.*
- *Introduction of automated invoice processing system at four centres of competence.*
- *Accounting standards changed from IFRS to Swiss GAAP FER.*
- *"Lean/5S" introduced at four centres of competence.*
- *Project Conmonto: value-driven maintenance.*

The ORIOR responsibility (sustainability)

We embrace responsibility throughout the value chain

- Sustainability is part of our core business and foundation of Excellence in Food.
- Sustainable procurement of raw materials, environmental responsibility and human treatment of farm animals (animal welfare).
- Further reduction of food & non-food waste, energy consumption and wastewater at our production plants. Reduction of packaging for consumers.
- Continuous renewal of product range with products that have natural ingredients and no artificial additives, and recipes with reduced levels of sodium and sugar.

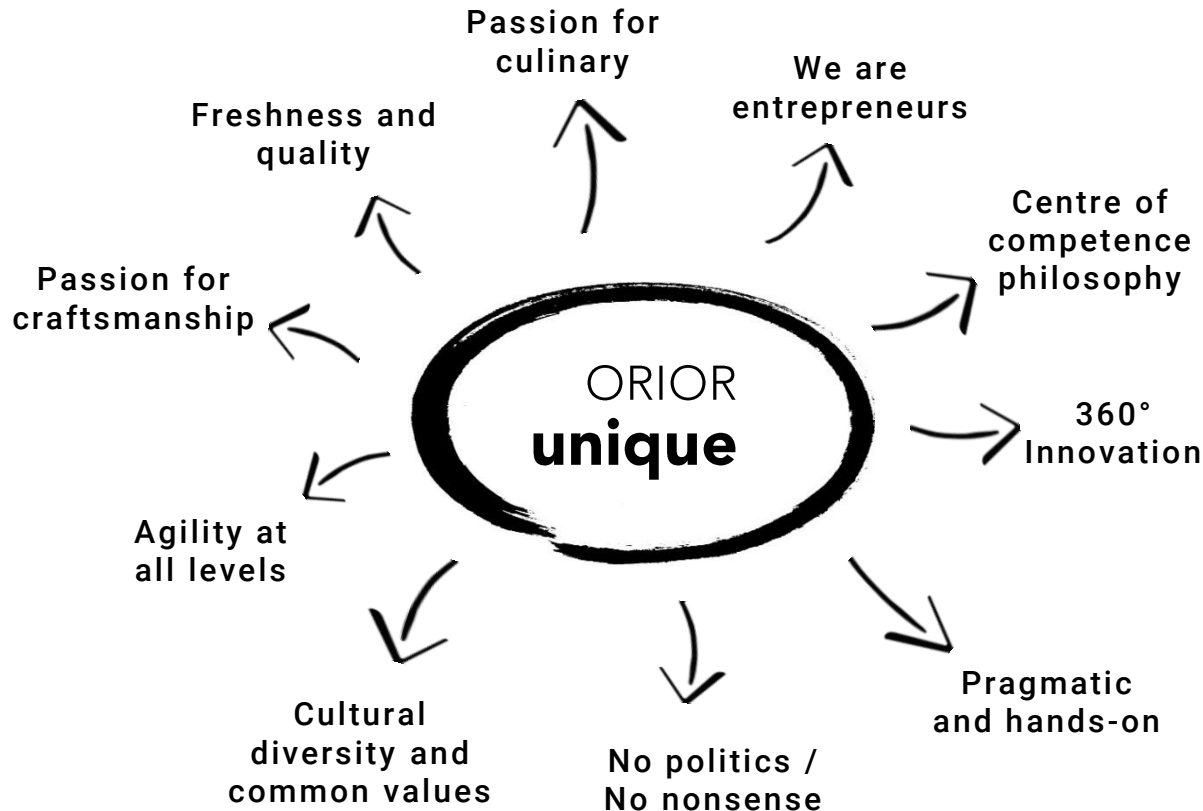


A snapshot of projects and measures under way

- *Internal guidelines for sustainable sourcing are being formulated.*
- *GRI sustainability report in progress.*
- *Strengthening of organic profile/competence thanks to acquisition of the Biotta Group.*
- *Recipe management: less sodium, fewer food additives, “clean labels”, etc.*
- *Resources: energy recovery projects, CO2 tax exemption.*
- *Internal sustainability reporting with monthly measures, incl. reduction in food and packaging waste.*
- *Elaboration of health management policies in progress.*

We are ORIOR

Successful thanks to a unique and entrepreneurial spirit



Employee App «ORIORinside»



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Outlook for 2019

Environment

Stable markets with ongoing structural consolidation.

Ongoing challenging environment:

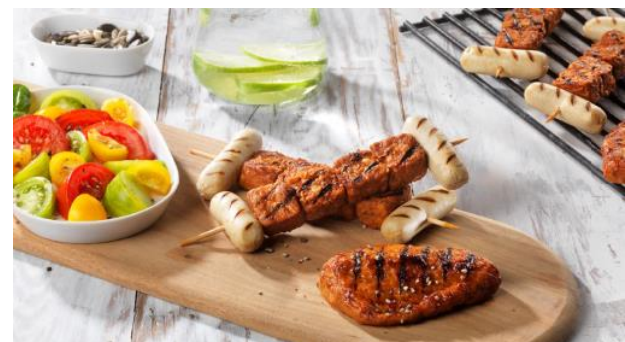
- Raw material prices will remain volatile: especially for meat and poultry.
- Unrelenting stiff competitive and pricing pressure.

ORIOR Focus

- Steadfast implementation of initiatives and action plans under ORIOR 2020 strategy:
 - Focus on innovation, new concepts and services and on steady brand marketing/development.
- Advance the Group-wide, multi-disciplinary ORIOR Champion Model.
- Further development of Biotta Group, successive integration into ORIOR Champion Model.
- Acquisition of majority stake in Casualfood scheduled for fall 2019.
- Publish the company's first GRI sustainability report.

Outlook

- Good year, creating value for all stakeholders.
- Further improvement of our operating performance and efficiency.
- Portfolio management to ensure margin stability.



Accounting standard switched to Swiss GAAP FER

- Switch accounting standard to Swiss GAAP FER as of the 31 December 2018 reporting date.
- The major changes will be the reporting of pension-fund liabilities and the treatment of intangible assets and goodwill.
- Balance sheet: Drop in equity due to retroactive write-off of intangibles and offsetting of goodwill against equity.
- A detailed transition report will be given with the 2018 accounts.
- Reason for the transition: increasing complexity of IFRS and the ensuing substantial administrative costs.



Impact on ORIOR's financial statements

Consolidated income statement

Revenues: no impact

EBITDA: transaction costs, recognition of pension liabilities

EBIT: transaction costs, recognition of pension liabilities, amortisation of intangible assets

Consolidated balance sheet

Equity ratio: offsetting of all goodwill against equity, effects from income statement (see above)

Consolidated cash flow statement

No impact

Fiscal year 2017: Revenues by segment

New revenue recognition standard: IFRS 15

in CHF million	Fiscal year 2017		
	Revenues Reported	IFRS 15 effect	Revenues Restated ¹⁾
ORIOR Group	585.5	−46.1	539.4
ORIOR Convenience	187.7	−7.4	180.3
ORIOR Refinement	290.2	−38.7	251.5
ORIOR International	124.7	0.0	124.7

¹ Restated revenues by segment based on unaudited figures.

Our ambition:

Excellence in Food

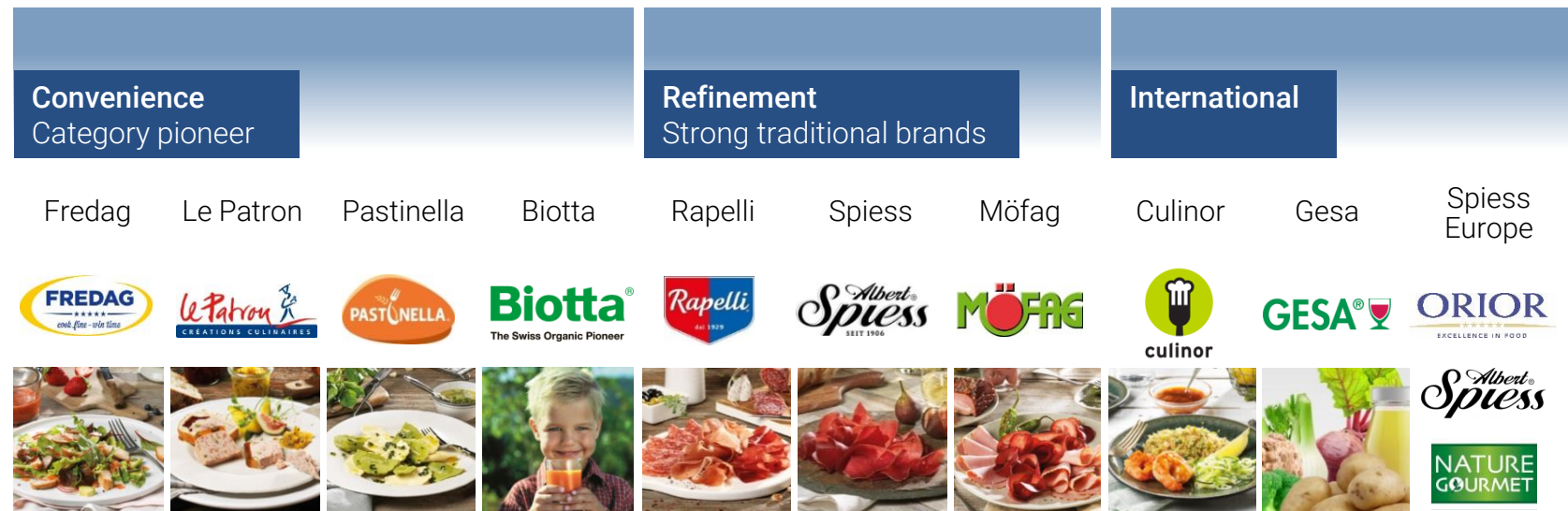
We are **striving** for **uniqueness**
and offering **best quality**
in order to **surprise**
our **consumers** time and again
with **enjoyable**
food moments.

ORIOR business model

ORIOR is an **internationally operating** Swiss food and beverage group that combines **craftsmanship** with a **pioneering spirit** and is thriving on **entrepreneurship** and **strong values**. The **delightful world** of ORIOR consists of **well-established companies** and **brands** with **leadership positions** in **growing niche markets** in **Switzerland** and **abroad**.

ORIOR's **decentralised** and **agile structure** combined with the unique and intradisciplinary **Champion Model** allows to drive the market at the forefront with **innovative products, concepts and services**. ORIOR has a **strong presence** in all **retail** and **food service** channels underpinned by **long-standing partnerships** with customers.

ORIOR's goal is to **steadily create value** for all stakeholders.



ORIOR locations

ORIOR International



Culinor, Destelbergen (BE)
Chilled premium ready meals and meal components.



Vaco's Kitchen, Olen (BE)
Production of sous-vide products, chef meals and meal components.



Gesa, Neuenstadt-Stein (DE)
Organic vegetable juices for food and beverage industry.



ORIOR / Spiess Europe (FR)
Distribution centre in Haguenau.

ORIOR Switzerland



Fredag, Root
Poultry specialties, convenience meat dishes and vegetarian/vegan.



Le Patron, Böckten
Pâtés and terrines, ready meals, meal components.



Pastinella, Oberentfelden
Fresh, filled and unfilled Italian-style pasta.



Biotta, Tägerwilen
Organic juices made from naturally grown fruits and vegetables.



Rapelli SA, Stabio
Ticino charcuterie specialties like salami, prosciutto and coppa.



Albert Spiess, Schiers
Grisons specialties like Bündnerfleisch, Salsiz and cured ham.



Möfag, Zuzwil
Fürstenländer specialties such as Mostbröckli and hams.

Convenience (CH) – category pioneers

Fredag



- Pioneer and leader for vegan and vegetarian products
- Inventor and leader of tofu specialities
- Strong competence in meat and poultry convenience for retail and food service

Le Patron



- Inventor and innovation driver of ultra-fresh ready to eat meals
- High premium ultra-fresh pasta sold in shop-in-shop concepts
- Pioneer and leader of pâtés and terrines

Pastinella



- Strong competence in filled and unfilled pasta production
- Leader in premium chilled pasta creations
- Inventor of gluten/lactose free chilled pasta and pasta ranges for dieters and people with food intolerances

Biotta



- THE Swiss organic pioneer
- All-natural organic vegetable and fruit juices and beverage specialities
- Strong concepts with well-known and highly trusted brands: Biotta, Vivitz, Traktor and C-ICE
- Very high culinary and quality standards



Refinement (CH) – strong heritage brands

Rapelli



- Modern character with a hint of history
- Mastri Salumieri
- Ticino Specialities
- Top-level brand awareness in Switzerland
- Since 1929

Albert Spiess



- The finest raw ingredients
- Bündnerfleisch = GGA brand article
- Pure mountain air and time-honoured tradition
- Highest-lying meat-curing facility in Europe
- Since 1906

Möfag

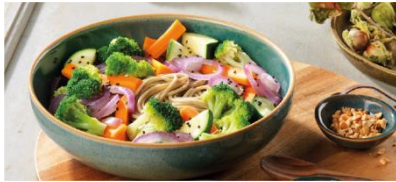


- Traditional Swiss recipes
- Cleanroom technology
- Innovative / flexible / customer oriented
- Handles small volumes very efficiently
- Time to market
- Since 1978



ORIOR International

Culinor Food Group



- ORIOR Europe platform targets the entire European region
- Premium fresh ready-made meals and meal components for retailers and food service companies in the Benelux
- Ultra modern facilities and a wide range of technologies

Gesa



- Premium vegetable juices and concentrates, pressed from freshly harvested vegetables
- Natural processing methods only
- Broad distribution network across Europe

Spiess Europe



- Sales office ORIOR/Spiess Europe in Haguenau (F) serves as the export platform for distribution outside Switzerland
- Bündnerfleisch “Albert Spiess of Switzerland” is our most popular export product



Share information

Listing	SIX Swiss Exchange
Security number	11167736
ISIN code	CH011 1677 362
Ticker	ORON
LEI	50670020I84ZA17K9522
UID	CHE-113.034.902

Share price on 01.03.2019 CHF 84.40

Dividend	2018	2017	2016	2015	2014	2013	2012	2011
Dividend per share in CHF	2.24 ¹	2.17	2.09	2.03	2.00	1.97	1.95	1.93
Dividend increase vs. previous year in %	3.2	3.8	3.0	1.5	1.5	1.0	1.0	1.6

→ ORIOR's attractive dividend policy was confirmed in the ORIOR 2020 strategy and a steady increase in the absolute dividend in coming years is targeted.

Stock information / data		31.12.18	31.12.17
Share price on 30.06.	in CHF	79.70	77.15
High	in CHF	92.70	82.00
Low	in CHF	72.50	71.15
Market cap	CHF million	519.4	457.1
Earnings per share	in CHF	4.98	4.29
Operating cash flow per share	in CHF	8.25	9.44
Shareholders' equity per share	in CHF	14.04	14.46

Major shareholders (20.02.2019)¹

UBS Fund Management AG (CH)	10.51%
Swisscanto Fondsleitung (CH)	5.43%
Credit Suisse Funds AG (CH)	5.31%
Schroders Plc (GB)	4.88%
Rolf U. Sutter / Group (CH)	3.07%

Company calendar

11.04.19	Annual General Meeting 2019
19.08.19	Publication of full year results 2019

¹ Proposal to the AGM of 11 April 2019.

² Information on major shareholders is given on page 12 ff. in the 2018 annual report.

Disclaimer

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