

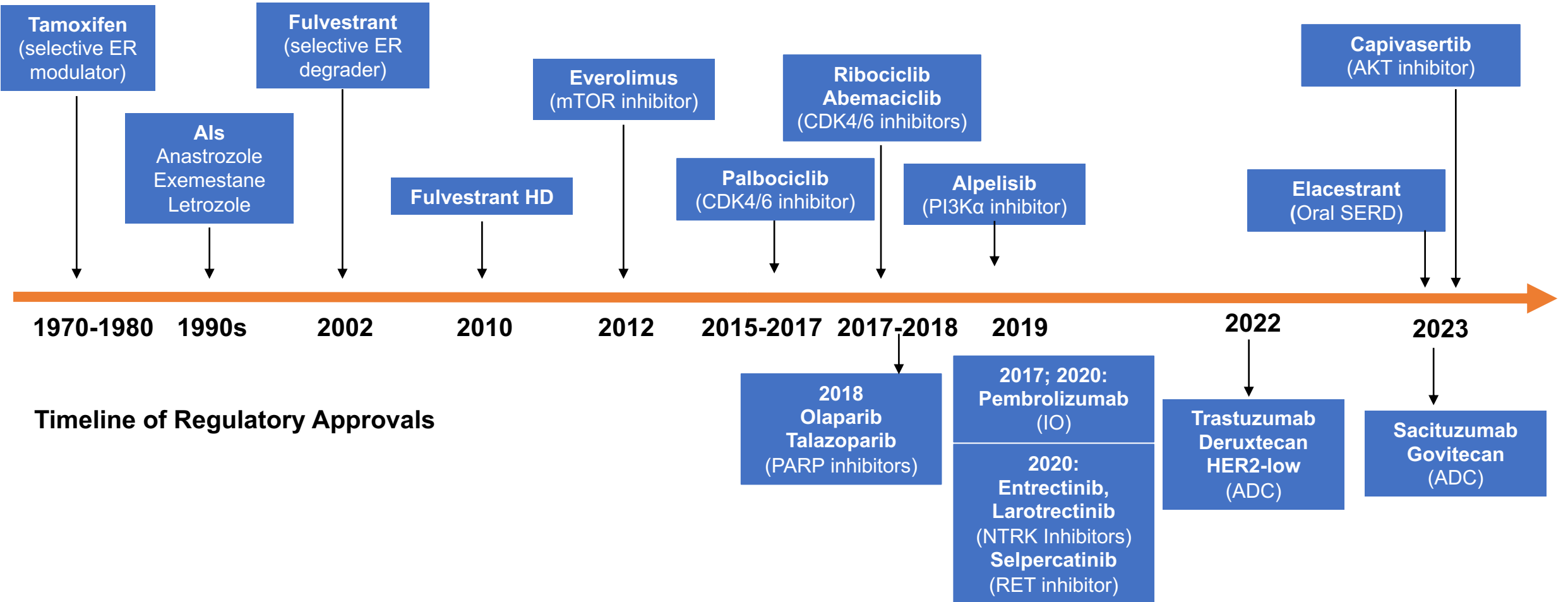
Sequencing Endocrine Therapy and Targeted Agents for the Treatment of Hormone Receptor Positive Metastatic Breast Cancer

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Treatment Landscape of HR+ Advanced MBC



Timeline of Regulatory Approvals

AI, aromatase inhibitor; CDK4/6, cyclin-dependent kinase 4/6; ER, estrogen receptor; ET, endocrine therapy; HD, high dose; HR, hormone receptor; MBC, metastatic breast cancer; mTOR, mammalian target of rapamycin; PI3K α , phosphoinositide 3-kinase α . Anastrozole [PI]. Approved 1995. Revised November 2022; Exemestane [PI]. Approved 1999. Revised May 2018; Letrozole [PI]. Approved 1997. Revised January 2014; Fulvestrant [PI]. Approved 2002. Revised July 2011; Everolimus [PI]. Approved 2012. Revised October 2010; Palbociclib [PI]. Approved 2015. Revised April 2019; Ribociclib [PI]. Approved 2017. Revised March 2017; Abemaciclib [PI]. Approved 2017. Revised October 2021; Alpelisib [PI]. Approved 2019. Revised May 2019; Brufsky AM. Cancer Treat Rev. 2017;59:22-32; Lim E, et al. Oncology (Williston Park). 2012;26:688-694; Croxtall JD, et al. Drugs. 2011;71:363-380; Carlson RW, et al. J Clin Oncol. 2010;28:3917-3921; NCCN. Breast cancer (v4.2023). 2023. Accessed May 1, 2023. http://www.nccn.org/professionals/physician_gls/pdf/breast.pdf

PFS in 1st and 2nd Line Treatment With CDK4/6 Inhibitors + ET

| | 1 st LINE TREATMENT | | | | ≥ 2 nd LINE TREATMENT | | 1 st AND 2 nd LINE TREATMENT |
|---|--------------------------------|---------------------|------------------------|---|----------------------------------|----------------------|--|
| | PALOMA-2 | MONALEESA-2 | MONARCH-3 | MONALEESA-7 | PALOMA-3 | MONARCH-2 | MONALEESA-3 |
| Endocrine partner | Letrozole | Letrozole | Letrozole | Letrozole (or Tamoxifen) + LHRH agonist | Fulvestrant | Fulvestrant | Fulvestrant |
| CDK4/6 Inhibitor | Palbociclib | Ribociclib | Abemaciclib | Ribociclib | Palbociclib | Abemaciclib | Ribociclib |
| Patients on study, n | 666 | 668 | 493 | 672 | 521 | 669 | 726 |
| Primary Endpoint = PFS (CDK4/6 inhibitor + ET vs. ET) | | | | | | | |
| HR | 0.58 | 0.56 | 0.54 | 0.55 | 0.46 | 0.55 | 0.59 |
| Median PFS, months | 27.6 vs 14.5 (13.1 mo) | 25.3 vs 16 (9.3 mo) | 28.2 vs 14.8 (13.4 mo) | 23.8 vs 13 (10.8 mo) | 9.5 vs 4.6 (4.9 mo) | 16.4 vs 9.3 (7.1 mo) | 20.5 vs 12.8 (7.7 mo) |
| Secondary Endpoint = OS (CDK4/6 inhibitor + ET vs. ET) | | | | | | | |
| HR | 0.956 | 0.76 | 0.804 | 0.76 | 0.81 | 0.78 | 0.75 |
| Median OS, months | 53.9 vs 51.2 | 63.9 vs 51.4 | 66.8 vs 53.7 | 58.7 vs 40.9 | 34.9 vs 28.0 | 45.8 vs 37.25 | 52.2 vs 41.5 |

What are the Differences Among the CDK4/6 Inhibitors, and are They Significant and Relevant?¹⁻⁴

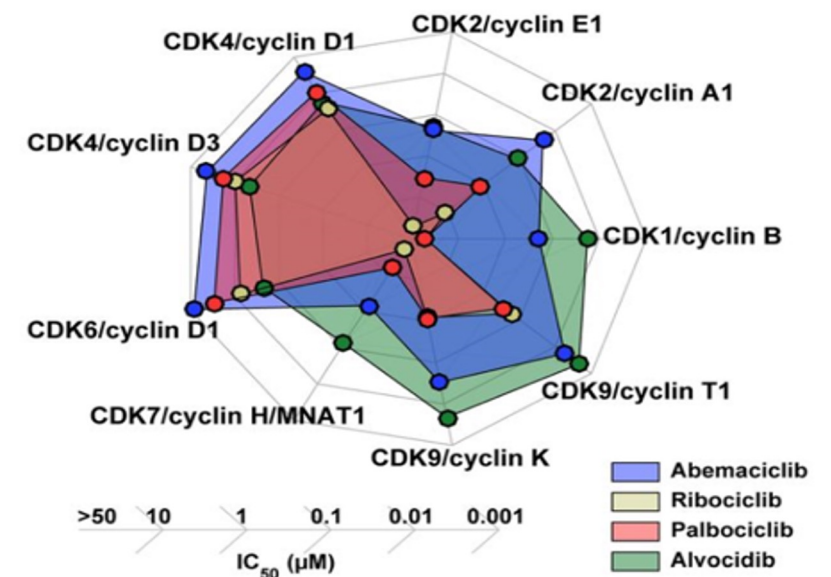
All Inhibit CDK4/6 complexes

- While palbociclib and ribociclib both have high selectivity for CDK4 and CDK6, ribociclib has a higher CDK4:CDK6 inhibition ratio (~4) given its weaker potency for inhibition of CDK6
- Abemaciclib has a different chemical structure and exhibits the highest inhibitory effect on CDK4/6 with a CDK4:CDK6 inhibition ratio of 5, and additional activity on multiple kinases, making it more potent and inducing a potent and sustained apoptotic effect; has cyclin B–CDK1, cyclin A/E–CDK2, and cyclin T–CDK9 inhibition
- Different acquired resistance mechanisms, demonstrated in a high-resolution analysis of pre-clinical models

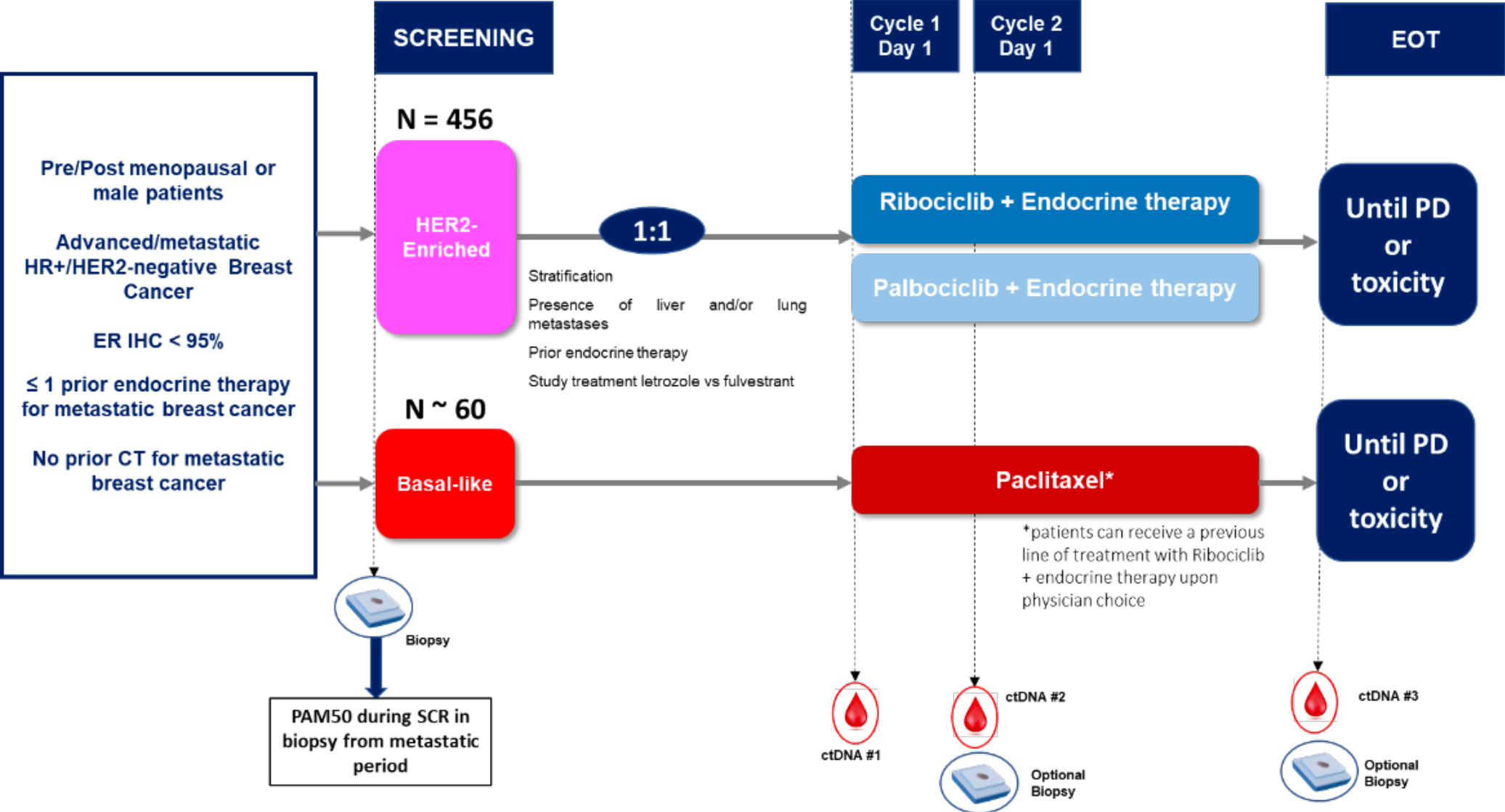
IC₅₀ Inhibition Values (nmol/L) Against Cyclin-CDK Complexes

| | Cyclin D1-CDK4 | Cyclin D1/2/3-CDK4 | CDK4:CDK6 Inhibition Ratio | Cyclin B-CDK1 | Cyclin A/E-CDK2 | Cyclin T-CDK9 |
|-------------|----------------|--------------------|----------------------------|---------------|-----------------|---------------|
| Palbociclib | 11 | 16 | 1:1.5 | >10,000 | >10,000 | NR |
| Ribociclib | 10 | 39 | 1:4 | 113,000 | 76,000 | NR |
| Abemaciclib | 2 | 10 | 1:5 | 1,627 | 504 | 57 |

Extent of Inhibition of CDK/Cyclin Complexes By Abemaciclib, Palbociclib, or Ribociclib



HARMONIA: Ribociclib vs Palbociclib in HER2E BC



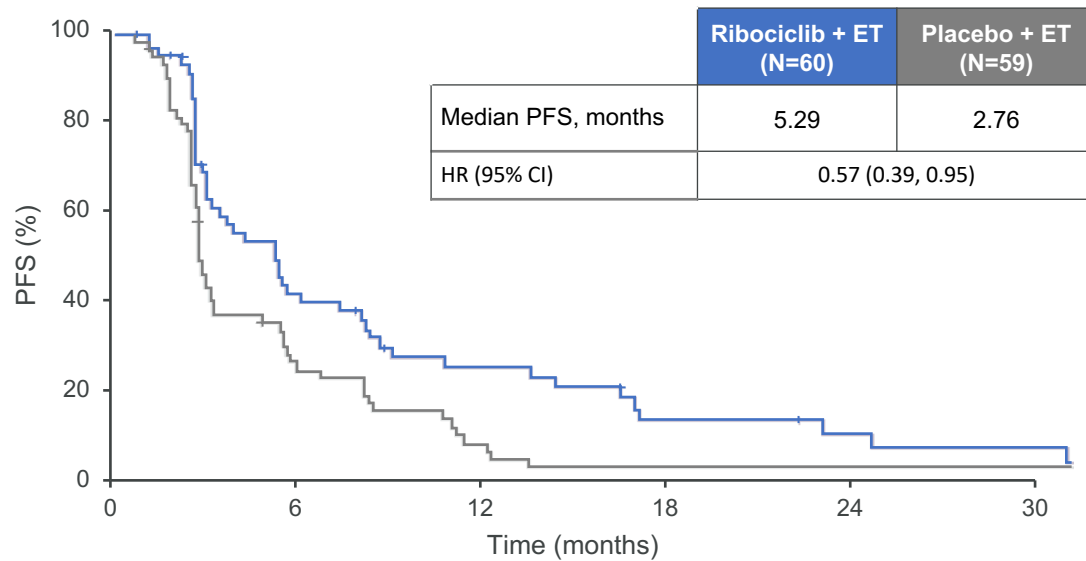
Approach to HR+/HER2- MBC Post-CDK4/6 Inhibitor: Move to Personalization

| 1L | 2L | 3L | 4L/5L | 6L |
|-------------------------|---|----|---|-----------------------|
| AI +/- CDK4/6i | ET + CDK 4/6i | | taxane or capecitabine | eribulin |
| fulvestrant +/- CDK4/6i | ET ± everolimus | | | |
| | <i>PIK3CA</i> m: fulvestrant + alpelisib | | pembrolizumab for high TMB or MSI-H | |
| | <i>BRCAm</i> : olaparib or talazoparib | | | |
| | <i>ESR1</i> m: elacestrant | | | |
| | <i>PIK3CA/AKT/PTEN alt</i> : fulvestrant + capivasertib | | | |
| | | | HER2 low: T-DXd | sacituzumab govitecan |
| | | | Dato-DXd? | |
| | <i>HER2</i> m: neratinib + fulvestrant + trastuzumab | | | |
| | | | NTRK fusion: larotrectinib or entrectinib | |
| | | | RET fusion: selpercatinib | |

CDK4/6i rechallenge: PACE results conflict with those seen in MAINTAIN

MAINTAIN¹

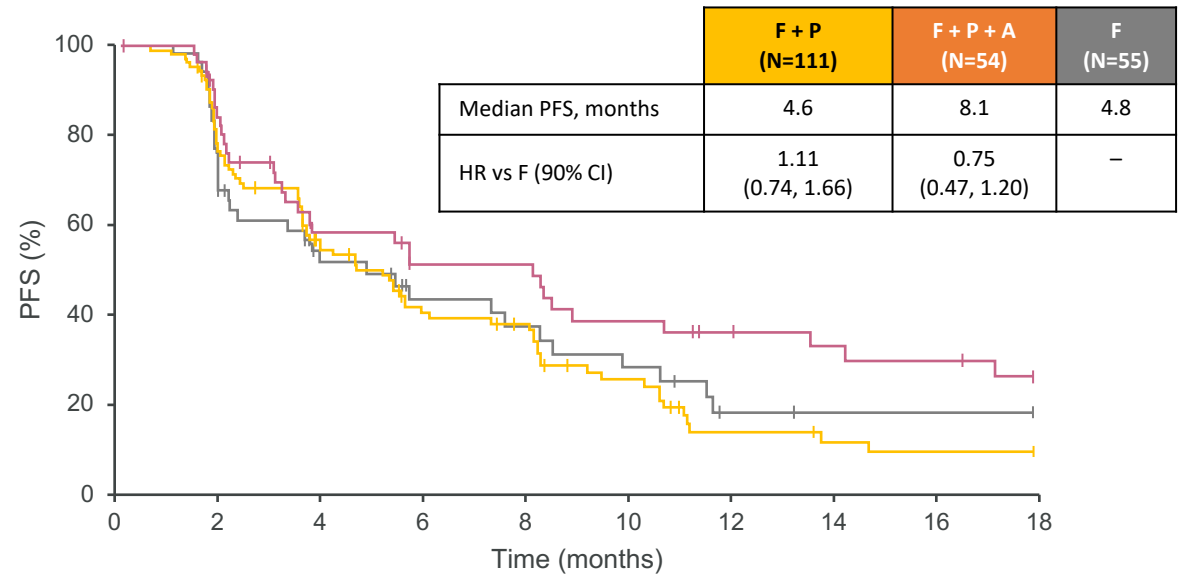
PFS



Palbociclib was the prior CDK4/6i in ~87% of patients

PACE²

PFS



Palbociclib was the prior CDK4/6i in ~91% of patients

PALMIRA Study Design (NCT03809988)

Key Eligibility Criteria

1. Patients with HR[+]/HER2[-] ABC*
2. PD on a 1L of palbociclib plus ET (AI or fulvestrant) after clinical benefit, or
 - PD on palbociclib-based adjuvant regimen after at least 12 months of treatment but no more than 12 months following completion
3. No other prior treatment for ABC

Stratification Factors

- Prior ET (fulvestrant vs. AIs)
- Site of disease (visceral vs. non-visceral)

R
2:1
N = 198

N = 136

N = 62

Fulvestrant[‡]

500 mg IM, on day 1,
15, 29 and monthly
thereafter

OR

Letrozole[‡]

2.5 mg PO, once daily,
continuously

+

Palbociclib[†]

75/100/125 mg PO, once daily, 3 weeks on, 1 week off

Fulvestrant[‡]

500 mg IM, on day 1,
15, 29 and monthly
thereafter

OR

Letrozole[‡]

2.5 mg PO, once daily,
continuously

Treatment until
progressive disease,
unacceptable
toxicity,
or
study
withdrawal

1L: First-line; ABC: Advanced breast cancer; AI: Aromatase inhibitors; ET: Endocrine therapy; HER2[-]: Human Epidermal Growth Factor Receptor 2-negative; HR[+]: Hormone receptor-positive; IM: Intramuscular injection; PO: oral administration; PD: Progressive disease; R: Randomization.

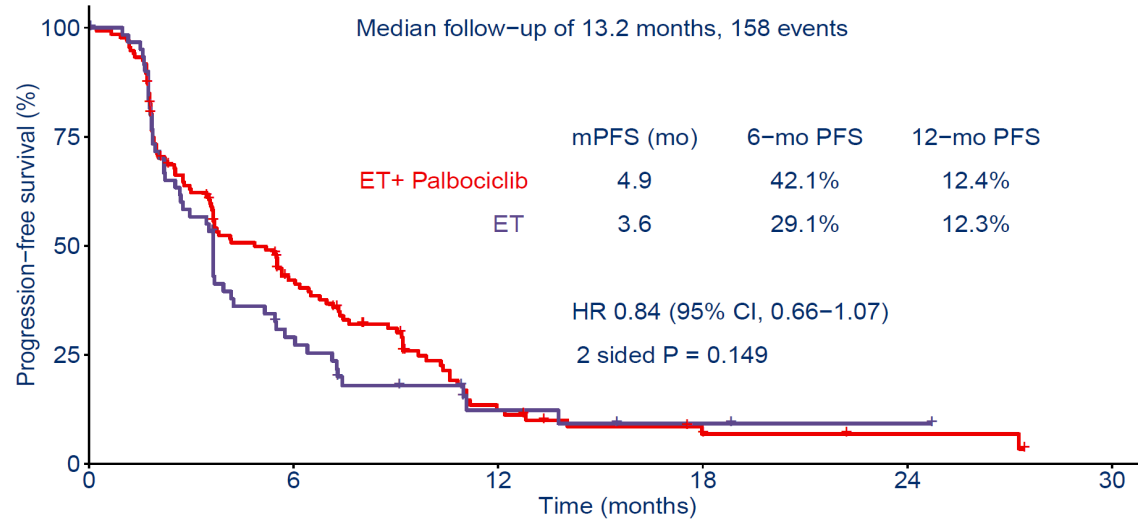
*If pre-menopausal, ovarian function suppression method required.

†Palbociclib dose could be reduced until 75 mg. If a dose reduction below 75 mg is required, treatment must be discontinued.

‡Administration of endocrine therapy was chosen depending on the prior administered agent.

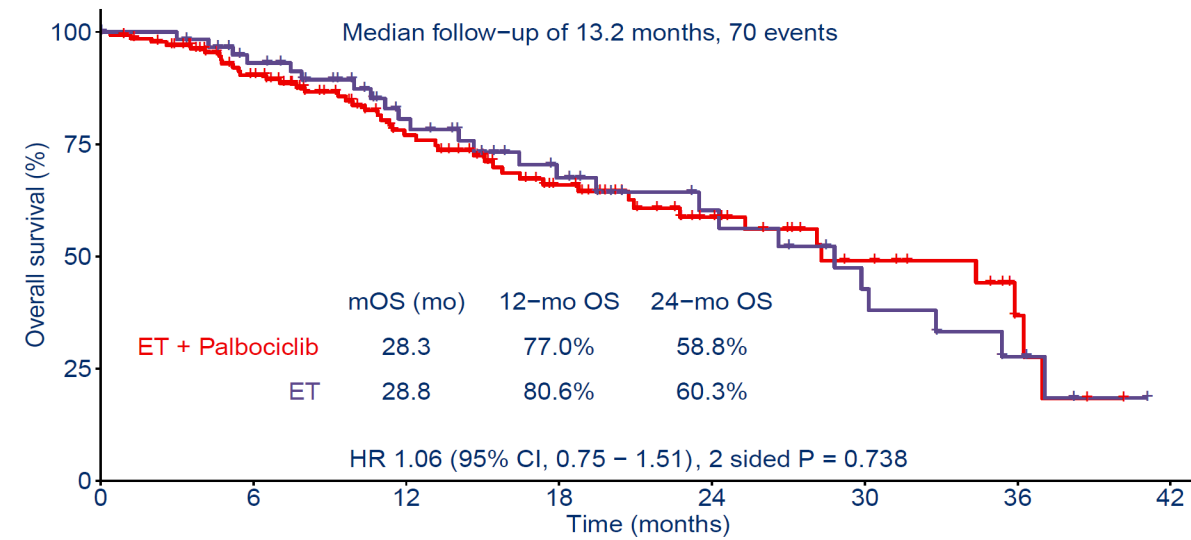
PALMIRA: Investigator-assessed PFS and OS (ITT)

PFS



| | Patients at risk, n (%) | | | | | |
|----------------|-------------------------|---------|--------|-------|-------|-------|
| | 0 | 6 | 12 | 18 | 24 | 30 |
| ET+Palbociclib | 136 (100) | 47 (35) | 11 (8) | 4 (3) | 2 (1) | 0 (0) |
| ET | 62 (100) | 16 (26) | 4 (6) | 2 (3) | 1 (2) | 0 (0) |

OS



| | Patients at risk, n (%) | | | | | | | |
|----------------|-------------------------|----------|---------|---------|---------|---------|-------|-------|
| | 0 | 6 | 12 | 18 | 24 | 30 | 36 | 42 |
| ET+Palbociclib | 136 (100) | 106 (78) | 68 (50) | 46 (34) | 25 (18) | 13 (10) | 4 (3) | 0 (0) |
| ET | 62 (100) | 52 (84) | 35 (56) | 23 (37) | 15 (24) | 9 (15) | 4 (6) | 0 (0) |

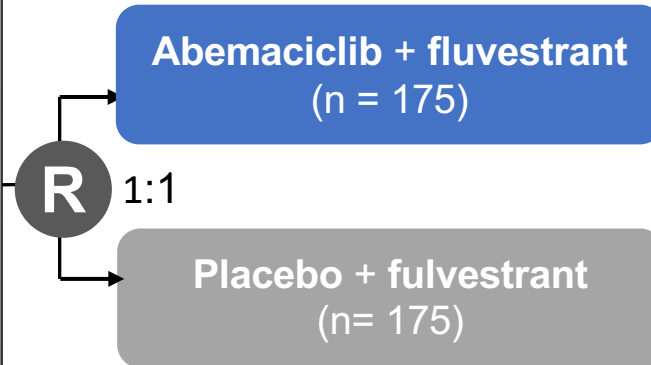
CI: Confidence interval; HR: Hazard ratio; ITT: Intention to treat; mo: Months; mPFS: Median progression-free survival; PFS: Progression-free survival.

Other Key Phase 3 Trials Assessing Continuation of CDK4/6 Inhibition Beyond Progression

postMONARCH (NCT05169567)¹

Does abemaciclib + fulvestrant improve outcomes after adjuvant or first-line CDK4/6i + ET?

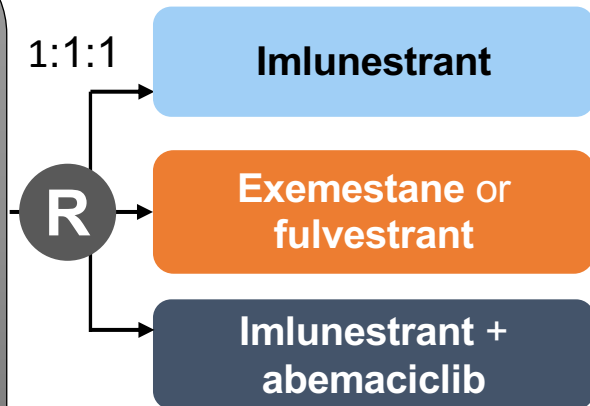
- HR+/HER2- MBC pre- and postmenopausal adults (women and men)
- Prior therapy:
 - Advanced setting: Disease progression on CDK4/6i plus an AI as initial therapy, or
 - Adjuvant setting: Disease recurrence on or after CDK4/6i + ET (N = 350)



EMBER-3 (NCT04975308)²

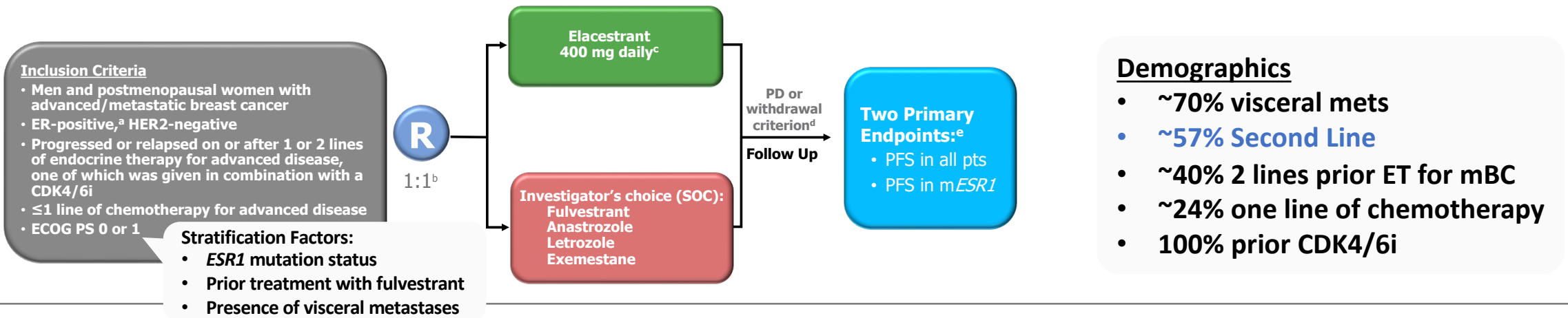
How well does imlunestrant ± abemaciclib work compared with standard hormone therapy?

- HR+, HER2- locally ABC or MBC
- If female, postmenopausal
- ECOG PS 0 or 1
- Measurable disease (per RECIST v1.1)
- Adequate organ function

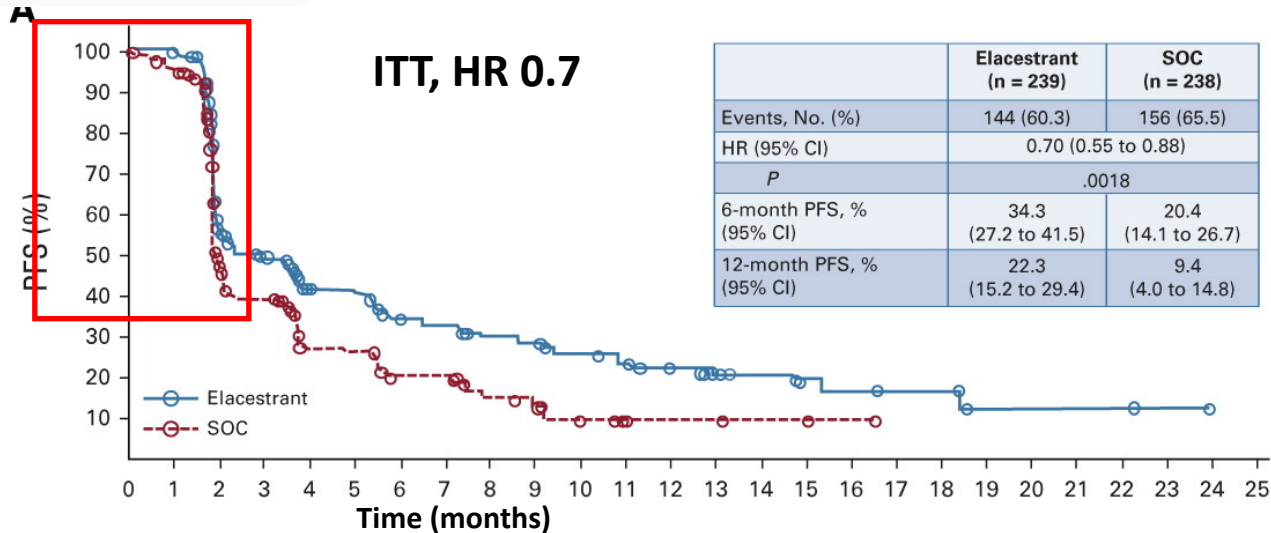


Elacestrant Monotherapy Post-CDK4/6 inhibitor

EMERALD: First Phase III, multicenter, international oral SERD Study



A



No. at risk:

| | | | | | | | | | | | | | | | | | | | | | | | | | |
|-------------|-----|-----|-----|----|----|----|----|----|----|----|----|----|----|----|----|---|---|---|---|---|---|---|---|---|---|
| Elacestrant | 239 | 223 | 106 | 89 | 60 | 57 | 42 | 40 | 34 | 33 | 27 | 24 | 19 | 13 | 11 | 8 | 7 | 6 | 6 | 2 | 2 | 2 | 2 | 1 | 0 |
| SOC | 238 | 206 | 84 | 68 | 39 | 38 | 25 | 25 | 16 | 15 | 7 | 4 | 3 | 3 | 2 | 2 | 1 | 0 | | | | | | | |

Elacestrant Alone Shows Respectable Disease Control in *ESR1*m with Long CDK4/6 Exposure

Trial Enrollment: Elacestrant (n=239) or SOC (n=238)

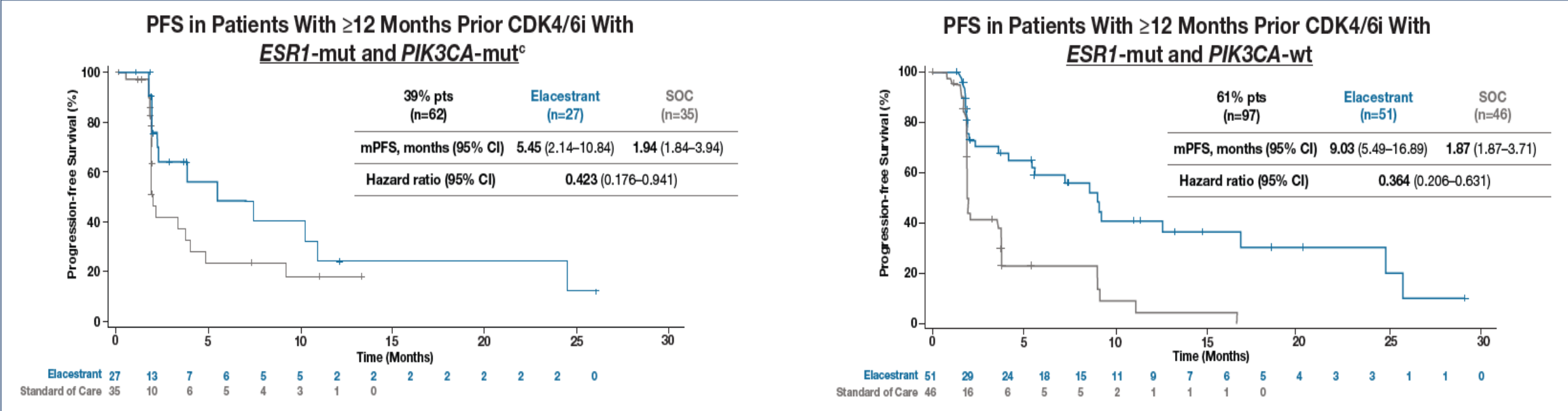
>12m on CDK4/6 in ITT

> 12m on CDK4/6 in *ESR1* mutant pts

| | At least 12 mo | | At least 18 mo | |
|---------|--------------------------|--------------------------|--------------------------|--------------------------|
| | Elacestrant (n=150) | SOC (n=160) | Elacestrant (n=98) | SOC (n=119) |
| mPFS | 3.78 (2.33 - 6.51) | 1.91 (1.87 - 3.58) | 5.45 (2.33 - 8.61) | 3.29 (1.87 - 3.71) |
| 6m PFS | 41.56 (32.30 - 50.81) | 21.72 (13.65 - 29.79) | 44.72 (33.24 - 56.20) | 25.12 (15.13 - 35.10) |
| 12m PFS | 25.64 (16.49 - 34.80) | 7.38 (0.82 - 13.94) | 26.70 (15.61 - 37.80) | 8.23 (0.00 - 17.07) |
| 18m PFS | 19.34 (9.98 - 28.70) | 3.69 (0.00 - 9.77) | 21.03 (9.82 - 32.23) | 4.11 (0.00 - 11.33) |
| HR | 0.613 (0.453 - 0.828) | | 0.703 (0.482 - 1.019) | |

| | At least 12 mo | | At least 18 mo | |
|---------|--------------------------|--------------------------|--------------------------|--------------------------|
| | Elacestrant (n=78) | SOC (n=81) | Elacestrant (n=55) | SOC (n=56) |
| mPFS | 8.61 (4.14 - 10.84) | 1.91 (1.87 - 3.68) | 8.61 (5.45 - 16.89) | 2.10 (1.87 - 3.75) |
| 6m PFS | 55.81 (42.69 - 68.94) | 22.66 (11.63 - 33.69) | 58.57 (43.02 - 74.12) | 27.06 (13.05 - 41.07) |
| 12m PFS | 35.81 (21.84 - 49.78) | 8.39 (0.00 - 17.66) | 35.79 (19.54 - 52.05) | 7.73 (0.00 - 20.20) |
| 18m PFS | 28.49 (14.08 - 42.89) | 0.00 (. - .) | 30.68 (13.94 - 47.42) | 0.00 (. - .) |
| HR | 0.410 (0.262 - 0.634) | | 0.466 (0.270 - 0.791) | |

Elacestrant in *ESR1* and *PIK3CA* Mutant Population and >12 Months on CDK4/6i



EMERALD: Safety and Summary

Safety Summary

- Most AEs, including nausea, were grade 1-2
- No grade 4 TRAEs were reported
- Discontinuations of therapy due to TRAEs:
 - Elacestrant arm: 3.4%
 - SOC arm: 0.9%
- No hematologic safety signal was observed
- None of the patients in either treatment arm experienced sinus bradycardia

| Nausea Summary | Elacestrant (n=237) | SOC (n=230) |
|---|------------------------|--------------------------------|
| Grade 3 nausea, n (%) | 6 (2.5) | 2 (0.9) |
| Dose reduction rate due to nausea, n (%) | 3 (1.3) | N/A |
| Discontinuation rate due to nausea, n (%) | 3 (1.3) | 0 |
| Antiemetic use, % | 8 | 10.3 (AI) 1.3 (fulvestrant) |

Randomized Trials of Novel SERDs/SERM Monotherapy

| | EMERALD (NCT03778931) | acelERA (NCT04576455) | SERENA-2 (NCT04214288) | ELAINE 1 (NCT03781063) |
|-------------------------|--|--|--|--|
| N | Phase III, 477 | Phase II, 303 | Phase II, 288 | Phase II, 103 |
| Prior CDK 4/6i | 100% | Allowed | 50% | 100% |
| Treatment Arms | Elacestrant vs ET (AI or Fulvestrant) | Giredestrant vs ET (AI or Fulvestrant) | Camizestrant (various doses) vs Fulvestrant | Lasofoxifene vs Fulvestrant |
| Primary Endpoint | PFS in ITT and <i>ESR1</i> mutant | PFS | PFS | PFS |
| % <i>ESR1</i>m | 48% | 39% | 34% | 100% |
| Results | 2.8m vs 1.9m HR 0.7, + study | HR 0.8 - study | 7.2m (75mg) vs 3.7m HR 0.58, + study | <i>ESR1</i> m: 6m vs 4m, HR 0.7, - study |
| <i>ESR1</i>mut | <i>ESR1</i> m: 3.78m vs 1.87m <u>HR 0.55</u> | <i>ESR1</i> m: <u>HR 0.6</u> | <i>ESR1</i> m: 6.3m (75mg) vs. 2.2m, <u>HR 0.3</u> | |

Recent Updates In the Novel Endocrine Agents Landscape

| | Monotherapy | | PI3K Pathway Combinations | | CDK4/6i Combinations | | |
|---------------------|-------------------------------------|---------------------------|---------------------------|---------------------------|--------------------------------------|---------------------------------|----------------------------|
| | Imlunestrant | OP-1250 (CERAN) | Imlunestrant + alpelisib | Imlunestrant + everolimus | Vepdegestrant (PROTAC) + palbociclib | OP-1250 (CERAN) + palbociclib | Imlunestrant + abemaciclib |
| N | 114 | 86 | 21 | 42 | 31 | 19 | 42 |
| ESR1 mutant | 49% | 48% | 47% | 48% | 43% | 52% | 7% |
| Median Prior Tx | 2 | 2 | 1 | 1 | 4 | 1 | 0 |
| % Prior CDK4/6i | 93% | 97% | 100% | 100% | 87% | 72% | 0% |
| % Prior Fulv | 52% | 66% | 43% | 31% | 80% | 11% | 5% |
| % Prior chemo | 25% | 31% (met) | 14% | 19% | 76% (46% met) | 22% | 10% |
| ORR | 8% | 3% | 58% | 21% | 42% | 10.5% (21% incl. uPR) | 32% |
| CBR | 42% | 40% | 62% | 62% | 63% | 46% | 71% |
| PFS | 4.3 (6.5 2L post CDK4/6i) | 4.6 (7.2 2L/3L) | 9.2 | 15.9 | 11.1 | N/R | 19.2 |
| N/R = not reported. | | | | | | | |

Selected Ongoing Clinical Trials of SERDs + Targeted Agents in HR+/HER2- ABC

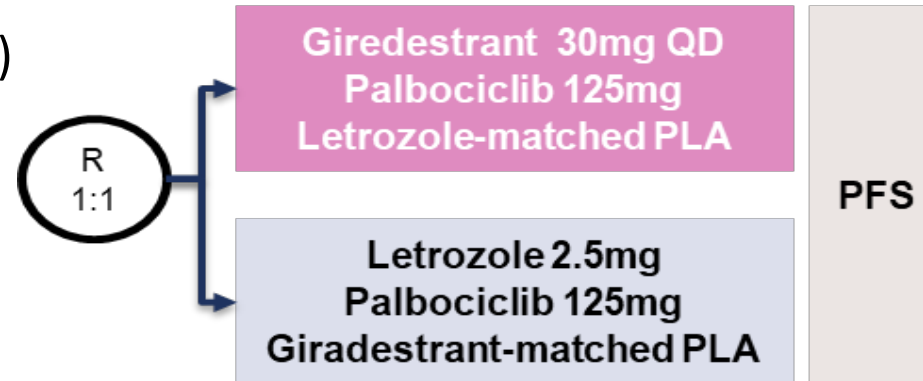
| Trial (NCT Identifier) | Intervention | Study Population | Primary Endpoint(s) | Secondary Endpoint(s) | Enrollment (Estimated) | Recruiting (Yes/No)* |
|--|---|--|---|---|------------------------|----------------------|
| ELEVATE (NCT05563220) | Elacestrant + <ul style="list-style-type: none"> Abemaciclib Ribociclib Palbociclib Alpelisib Everolimus | ≤ 2 ET, one of which is in combination with CDK4/6i | RP2D of elacestrant in combination with each of the other study drugs | Safety, PK, Efficacy (ORR, CBR, PFS, OS) | 322 | Yes |
| pionERA Breast Cancer (NCT06065748) | Giredestrant + CDK4/6i vs. Fulvestrant + CDK4/6i | Resistance to prior adjuvant ET; prior use of neo/adjuvant CDK4/6i allowed | PFS in <i>ESR1m</i> subgroup and full analysis set | PFS in the <i>ESR1nmd</i> subgroup, OS, cORR, DoR, CBR, time to chemotherapy, TTCD in PROs, AEs, vital sign and clinical laboratory test abnormalities | 1050 | Not yet recruiting |
| evERA Breast Cancer (NCT05306340) | Giredestrant + Everolimus vs. Physician's choice of ET + Everolimus | Prior ET in combination with CDK4/6i (metastatic or adjuvant setting) | PFS in <i>ESR1m</i> subgroup and ITT population | OS, ORR, DoR, CBR, TTCD pain severity, presence, and interference, TTCD in PROs, AEs, vital sign and clinical laboratory test abnormalities, plasma concentration of giredestrant | 320 | Yes |

Ongoing Trials of Oral SERDs in Combination With CDK4/6i in the 1st-L Metastatic Setting

persevERA (NCT04546009)

N=978

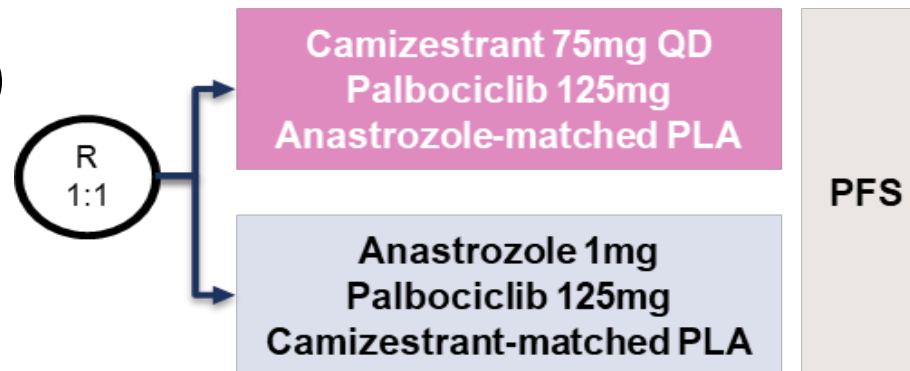
- ER+/HER2- LA/ABC
- No prior systemic tx for ABC



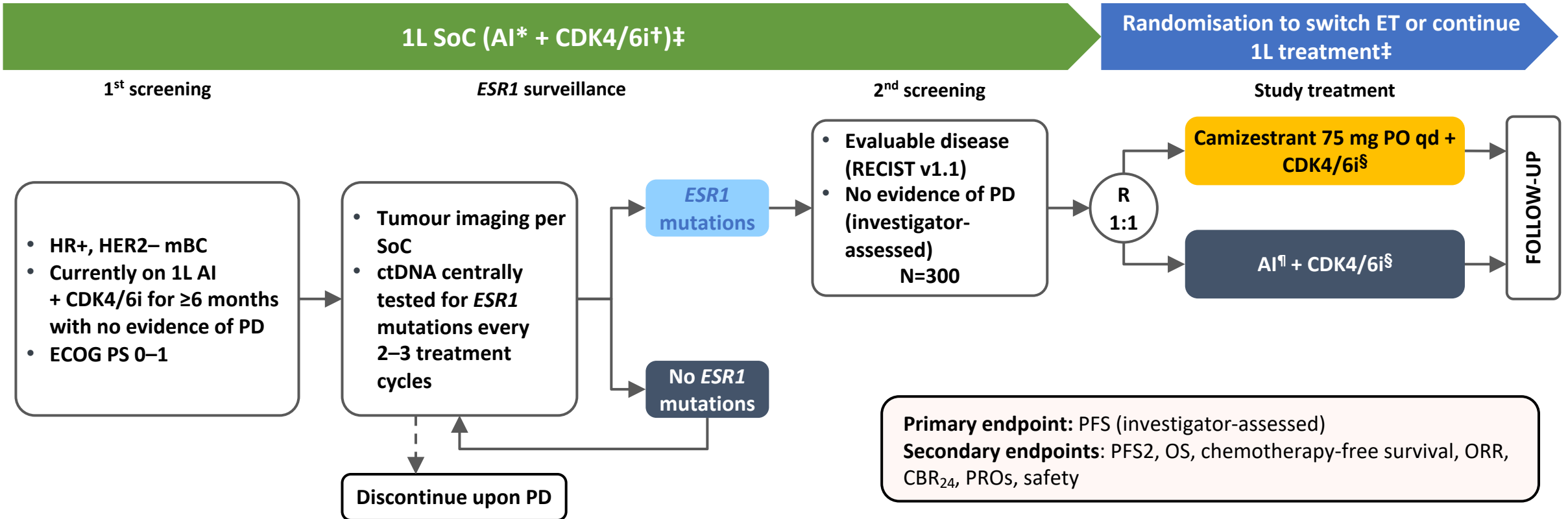
SERENA-4 (NCT04711252)

N=1342

- ER+/HER2- LA/ABC
- No prior systemic tx for ABC



SERENA-6: ctDNA *ESR1* Mutation-Guided Therapy^{1,2}

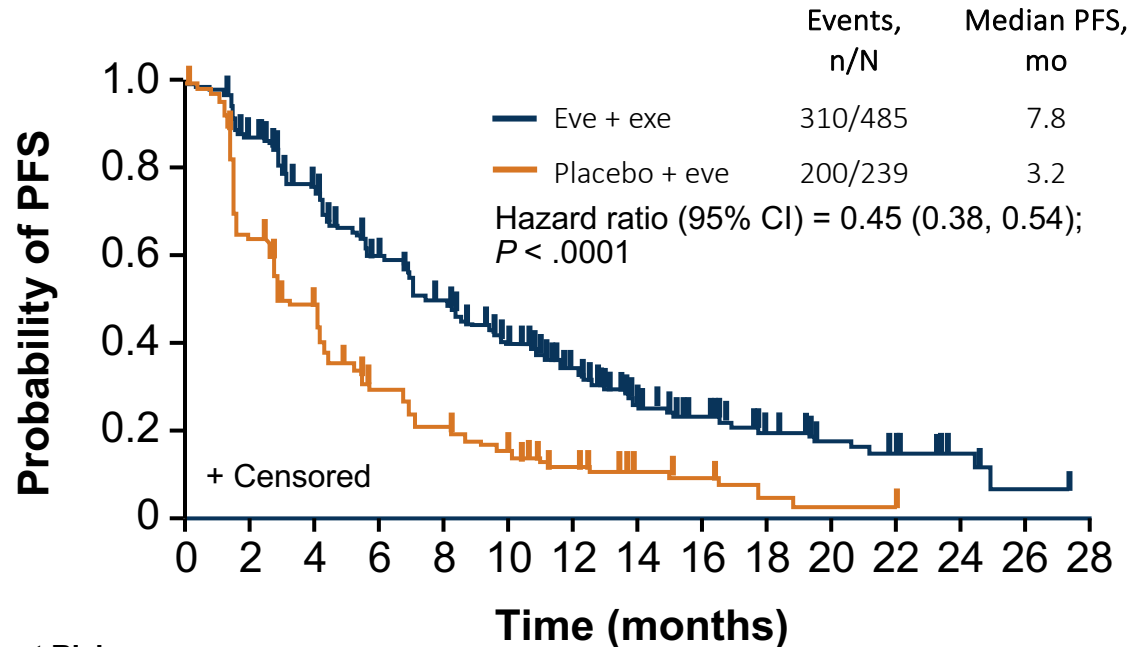


The SERENA-6 trial is currently recruiting

Letrozole or anastrozole. † Palbociclib or abemaciclib. ‡ Pre-/peri-menopausal women and men receive LHRH agonist as applicable. § Maintain same CDK4/6i as 1L treatment; ¶ Maintain same AI as 1L treatment. 1L, first line; AI, aromatase inhibitor; CBR₂₄, clinical benefit rate at 24 weeks; CDK4/6i, cyclin-dependent kinase 4/6 inhibitor; ctDNA, circulating tumour DNA; ET, endocrine therapy; HR, hormone receptor; LHRH, luteinising hormone-releasing hormone; mBC, metastatic breast cancer; ORR, objective response rate; OS, overall survival; PD, disease progression; PFS, progression-free survival; PFS2, time to second progression or death; PO, orally; PRO, patient-reported outcome; qd, once daily; RECIST, Response Evaluation Criteria in Solid Tumors.

Improved PFS With mTOR Inhibition *BOLERO-2 and PrE0102 Trials*

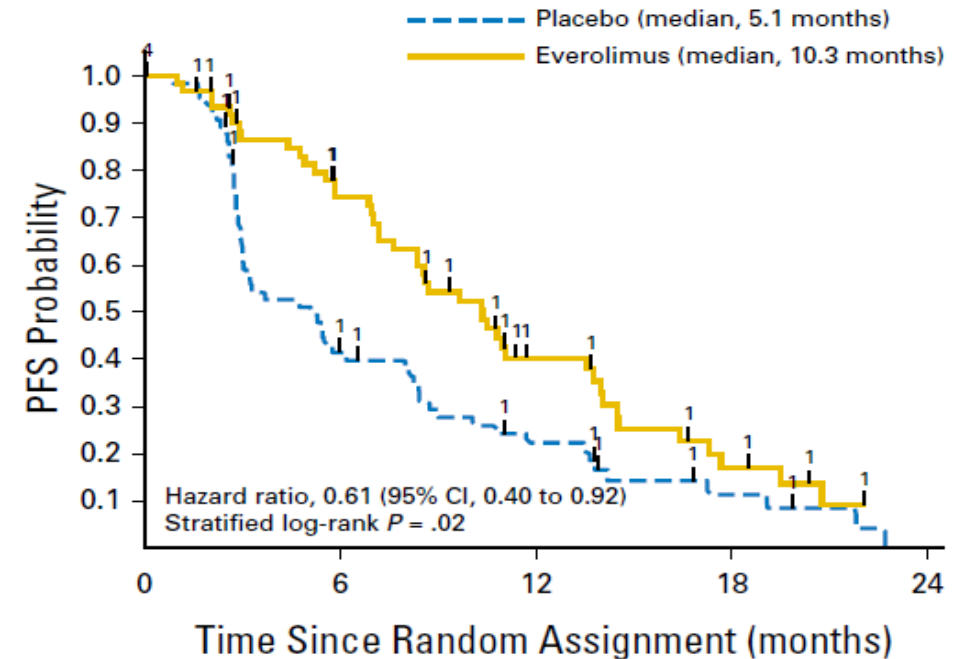
Local Assessment^[a,b]



No. at Risk

| | | | | | | | | | | | | | | | |
|---------------|-----|-----|-----|-----|-----|-----|----|----|----|----|----|----|---|---|---|
| Eve + exe | 485 | 394 | 318 | 236 | 194 | 147 | 99 | 57 | 42 | 23 | 13 | 10 | 4 | 1 | 0 |
| Placebo + eve | 239 | 146 | 103 | 61 | 42 | 27 | 17 | 9 | 6 | 2 | 1 | 1 | 0 | 0 | 0 |

Investigator-Assessed PFS^[c]



No. at risk:

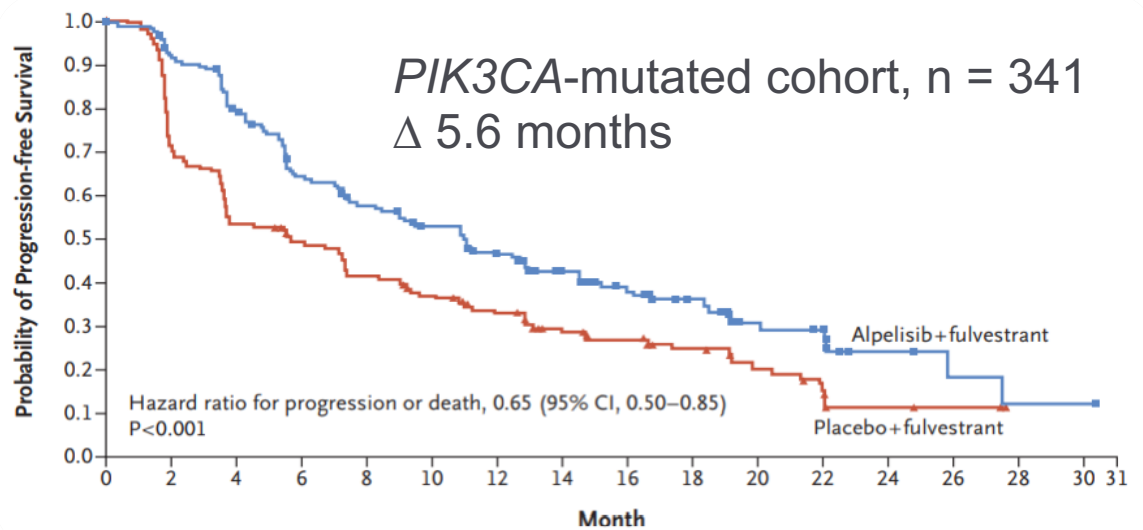
| | | | | | |
|------------|----|----|----|---|---|
| Placebo | 65 | 25 | 12 | 4 | 0 |
| Everolimus | 66 | 41 | 17 | 6 | 1 |

Improved PFS with mTOR inhibition regardless of *PIK3CA* mutation^[a-c]; similar results with tamoxifen + everolimus^[d]; no OS benefit

Option for Patients Whose Tumors Harbor *PIK3CA* Mutations

Fulvestrant + Alpelisib

SOLAR-1 (Phase 3): Fulvestrant ± Alpelisib (Progression on or after AI)



- Numerical improvement in median OS of 7.9 months in the mutated cohort^[b]
- Discontinuation rate was 25% in FUL + ALP arm vs 4.2% in the FUL arm^[a]
- Most common side effects (grade 3): hyperglycemia (36%), rash (10%), and diarrhea (7%)^[a]
- **6% had prior CDK4/6 inhibitor**

Median PFS^[a]

- 11.0 months (ALP + FUL) vs 5.7 months (FUL)
- HR = 0.65 (95% CI: 0.50, 0.85); P < .001

ALP, alpelisib; FUL, fulvestrant.

Activity With PI3K Inhibitors and Various Endocrine Partners

- PFS benefit in 2L metastatic setting after progression on CDK4/6i is ~ 5 to 7 months

| | BYLieve: PI3Ki + ET in HR+/HER2- BC With <i>PIK3CA</i> Mutation and PD on CDK4/6 Inhibition | | |
|-----------------------|--|--|--------------------------------------|
| | Cohort A ^[a] (n = 121) | Cohort B ^[b] (n = 115) | Cohort C ^[c] (n = 115) |
| Cohort population | CDK4/6i + AI as immediate prior tx | CDK4/6i + fulvestrant as immediate prior tx | Chemo or ET as immediate prior tx |
| Endocrine partner | Fulvestrant | Letrozole | Fulvestrant |
| PI3Ki | Alpelisib | Alpelisib | Alpelisib |
| Median PFS, mo | 7.3 | 5.7 | 5.6 |
| HR (PI3Ki vs control) | NA | NA | NA |

PD, progressive disease; tx, treatment.

a. Rugo HS, et al. Lancet Oncol. 2021;22:489-498; b. Rugo HS, et al. Presented at: San Antonio Breast Cancer Symposium (SABCS) 2020; December 8-11, 2020; Virtual. Presentation PD2-07; c. Rugo HS, et al. Presented at: San Antonio Breast Cancer Symposium (SABCS) 2021; December 7-10, 2021; San Antonio, TX. Presentation PD13-05.

Potential strategies to improve efficacy of isoform-specific PI3Ki

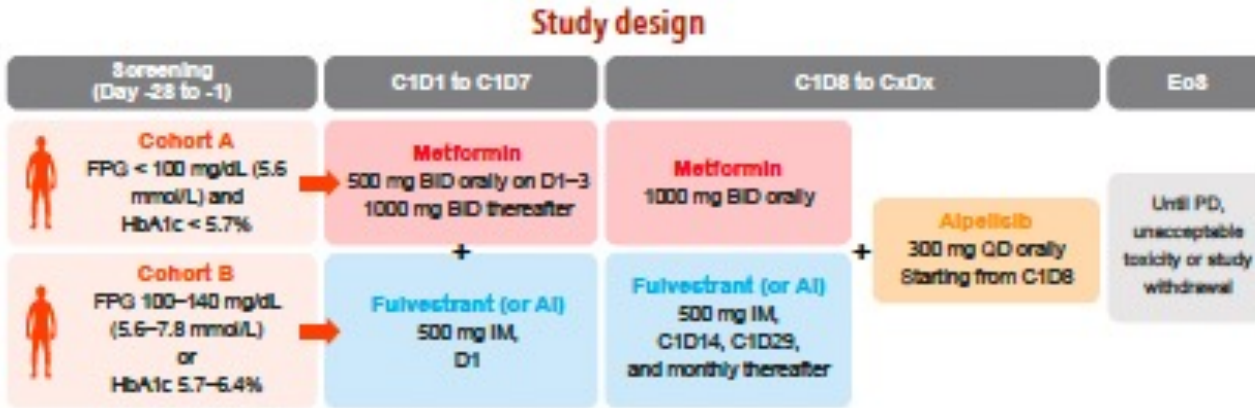
- **Improve toxicity profile**

- METALLICA trial: prophylactic metformin
- Role of mutant selective PI3K inhibitors

- **Triplet combination strategies: PI3Ki + CDK4/6i + ET**

- INAVO120
- VIKTORIA1

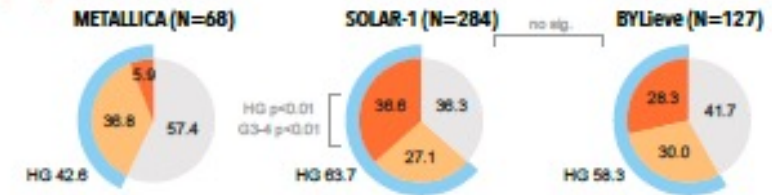
METALLICA Study: Metformin prophylaxis to prevent hyperglycemia with alpelisib



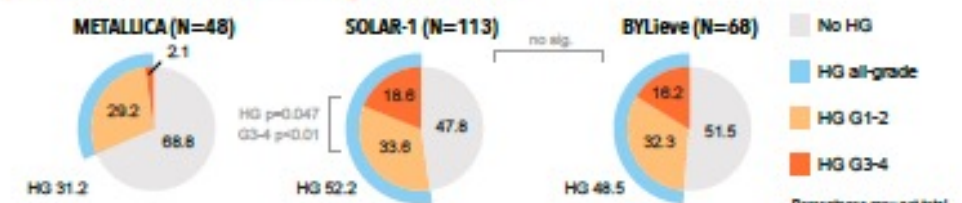
- Use of prophylactic metformin substantially reduced incidence of severe hyperglycemia with alpelisib exposure
- G3 hyperglycemia 5.9% (METALLICA) versus 36.6% (SOLAR-1)

Figure 1. Rate of HG reported in METALLICA, SOLAR-1, and BYLieve (Cohort A) (%)

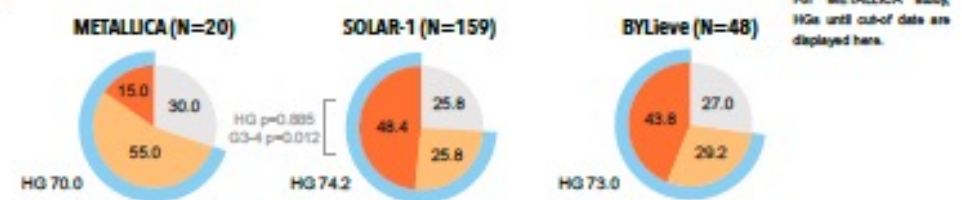
A) All patients



B) Cohort A: Patient with normal blood glucose at baseline



C) Cohort B: Prediabetics at baseline



The Next Frontier

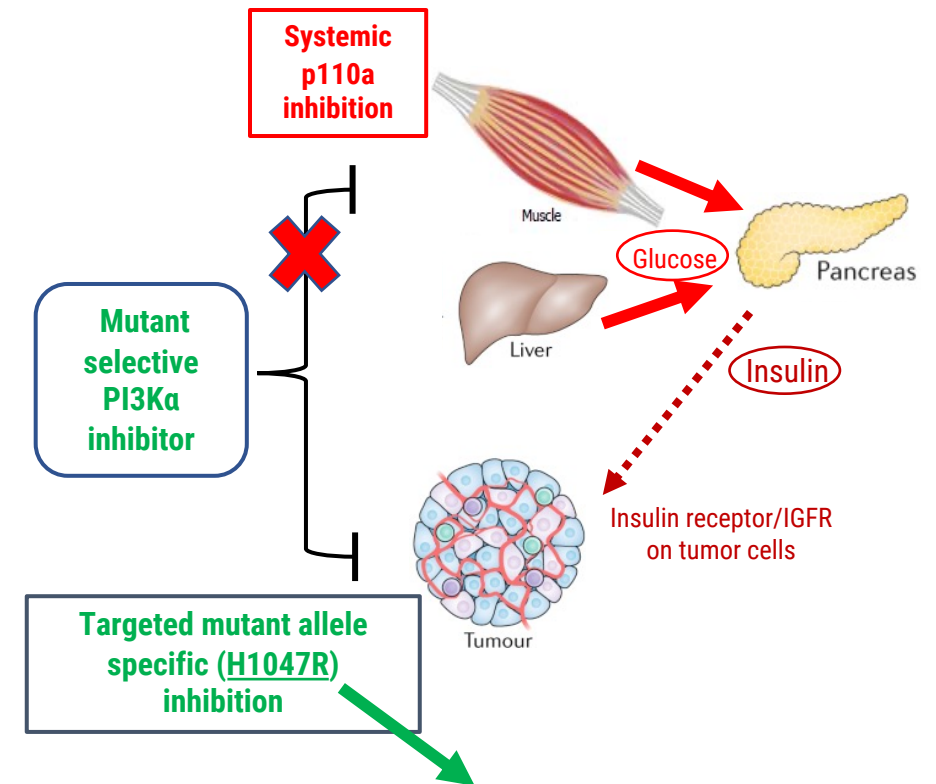
Tumor/Mutant Selective PI3K α Inhibitors

Selective targeting of oncogenic PI3K activation without inhibiting normal PI3K function in host tissues

Selective tumor targeting of PI3K α H1047R should:

- Permit higher and uninterrupted dosing
- Permit continuous and more complete target engagement
- Enable long-term dosing with novel combination regimens (CDK4/6 inhibitors, etc)

Increased efficacy and improved safety

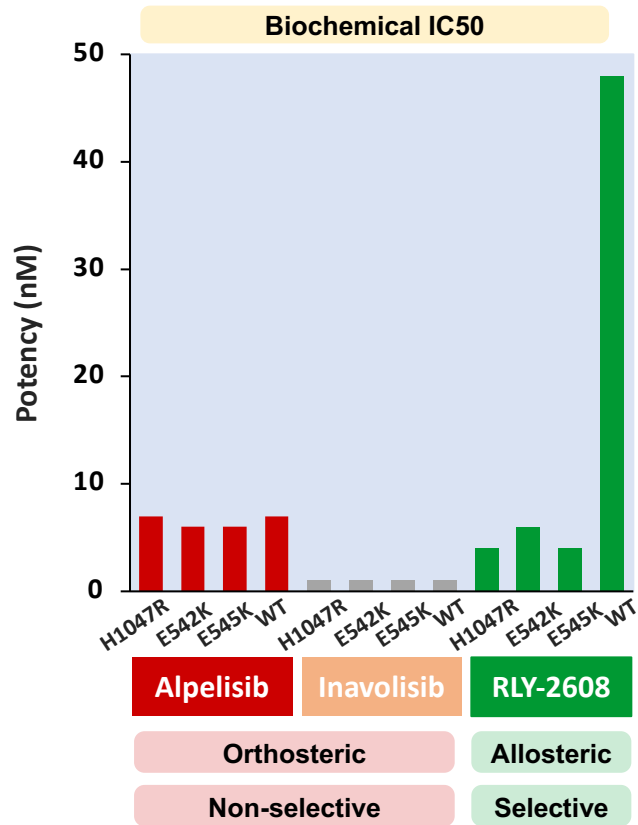


FIH Phase 1 trial LOXO-783 for *PIK3CA*_{H1047R} mutant cancer:
PIKASSO-01 NCT05307705

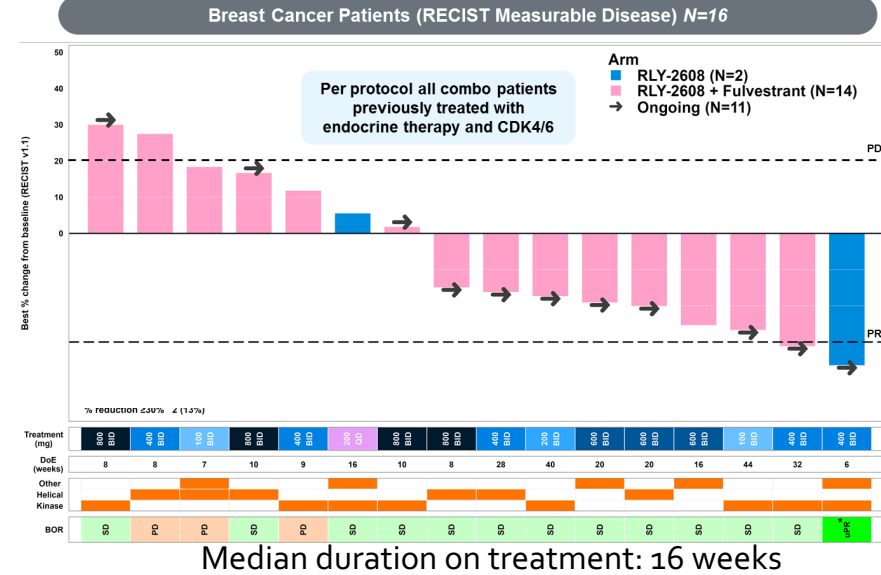
p110a kinase (exon 20 p.H1047R) domain mutation occurring **~15% of breast cancer**

ReDiscover: First-in-Human Study of RLY-2608

RLY-2608 selectively inhibits mutant PI3K α



Efficacy

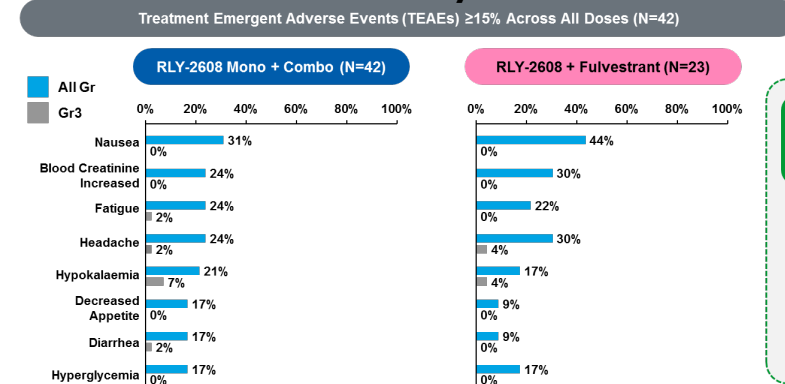


56% of patients (9/16) exhibit radiographic tumor reductions

81% of patients (13/16) with SD/uPR* across genotypes

11/16 patients ongoing

Safety



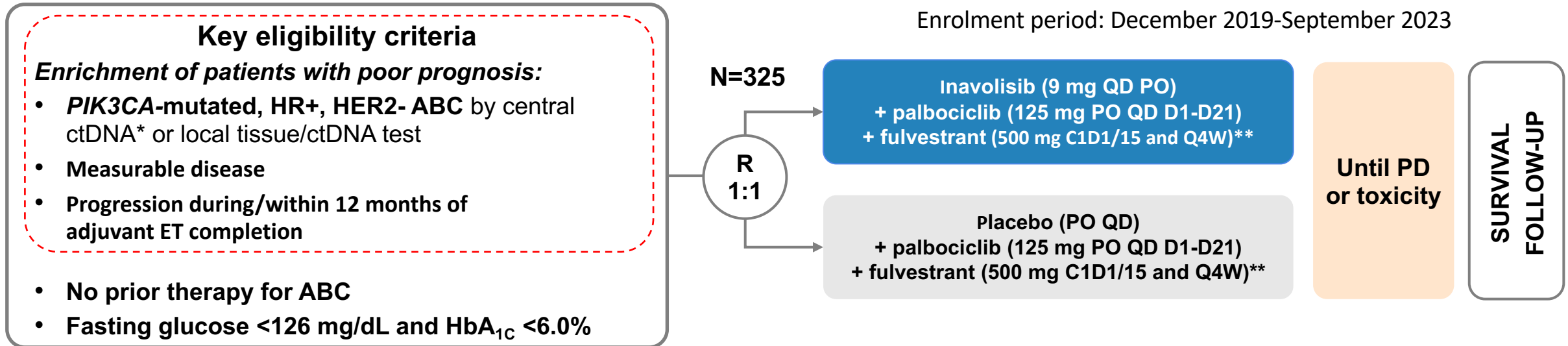
AEs leading to alpelisib discontinuation observed with RLY-2608 (for 400mg BID mono, \geq 600mg BID combo; N=17)

| AE | All Gr (Gr3+) |
|---------------|---------------|
| Hyperglycemia | 18% (0%) |
| Diarrhea | 0% |
| Rash | 12% (0%) |

Most AEs low grade, manageable, reversible
 Grade 3 TEAEs 10/42 (24%); No Grade 4-5 AEs
 Dose modifications due to AE: Interruptions 31%; Reductions 2%; Discontinuations 0%
 Median Relative Dose Intensity: 98%

NCT05768139 - First-in-Human Study of STX-478 as Monotherapy and in Combination With Other Antineoplastic Agents in Participants With Advanced Solid Tumors

INAVO120: Triplet combination of Inavolisib + Palbociclib + Fulvestrant *study design*



Stratification factors:

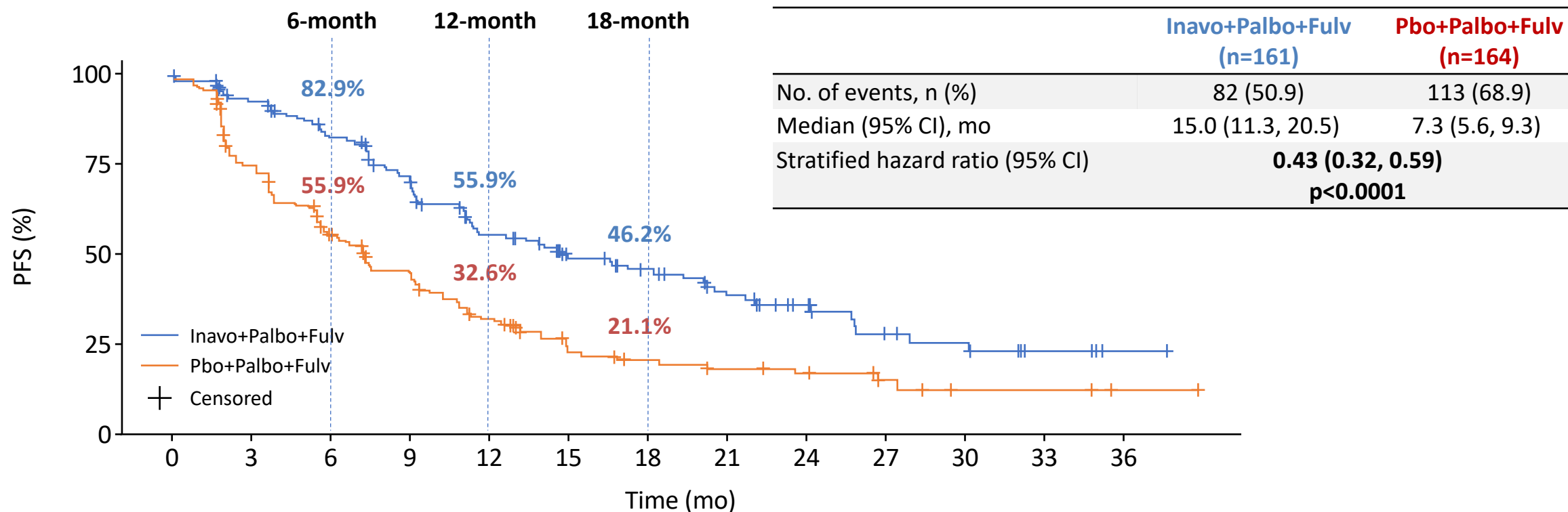
- Visceral Disease (Yes vs. No)
- Endocrine Resistance (Primary vs. Secondary)[†]
- Region (North America/Western Europe; Asia; Other)

Endpoints

- Primary: PFS by Investigator
- Secondary: OS[‡], ORR, BOR, CBR, DOR, PROs

* Central testing for *PIK3CA* mutations was done on ctDNA using FoundationOne®Liquid (Foundation Medicine). In China, the central ctDNA test was the PredicineCARE NGS assay (Huidu). [†] Defined per 4th European School of Oncology (ESO)–European Society for Medical Oncology (ESMO) International Consensus Guidelines for Advanced Breast Cancer.¹ Primary: relapse while on the first 2 years of adjuvant ET; Secondary: relapse while on adjuvant ET after at least 2 years or relapse within 12 months of completing adjuvant ET. [‡] OS testing only if PFS is positive; interim OS analysis at primary PFS analysis; **Pre-menopausal women received ovarian suppression. ctDNA, circulating tumor DNA; R, randomized. 1. Cardoso F, *et al. Ann Oncol* 2018;**29**:1634–1657.

INAVO 120: Primary endpoint: PFS (investigator assessed)



| Patients at risk: | 0 | 3 | 6 | 9 | 12 | 15 | 18 | 21 | 24 | 27 | 30 | 33 | 36 |
|-------------------|-----|-----|-----|----|----|----|----|----|----|----|----|----|----|
| Inavo+Palbo+Fulv | 161 | 134 | 111 | 92 | 66 | 48 | 41 | 31 | 22 | 13 | 11 | 5 | 1 |
| Pbo+Palbo+Fulv | 164 | 113 | 77 | 59 | 40 | 23 | 19 | 16 | 12 | 6 | 3 | 3 | 1 |

Median follow-up:
21.3 months

CCOD: 29th September 2023

CI, confidence interval; Fulv, fulvestrant; Inavo, inavolisib; mo, months; Palbo, palbociclib; Pbo, placebo; PFS, progression-free survival.

INAVO120: Adverse Events with Any Grade AEs ≥20% Incidence in Either Treatment Group

| Adverse Events | Inavo+Palbo+Fulv (N=162) | | Pbo+Palbo+Fulv (N=162) | |
|--|-----------------------------|--------------------|---------------------------|--------------------|
| | All Grades | Grade 3-4 | All Grades | Grade 3-4 |
| Neutropenia | 144 (88.9%) | 130 (80.2%) | 147 (90.7%) | 127 (78.4%) |
| Thrombocytopenia | 78 (48.1%) | 23 (14.2%) | 73 (45.1%) | 7 (4.3%) |
| Stomatitis/Mucosal inflammation | 83 (51.2%) | 9 (5.6%) | 43 (26.5%) | 0 |
| Anemia | 60 (37.0%) | 10 (6.2%) | 59 (36.4%) | 3 (1.9%) |
| Hyperglycemia | 95 (58.6%) | 9 (5.6%) | 14 (8.6%) | 0 |
| Diarrhea | 78 (48.1%) | 6 (3.7%) | 26 (16.0%) | 0 |
| Nausea | 45 (27.8%) | 1 (0.6%) | 27 (16.7%) | 0 |
| Rash | 41 (25.3%) | 0 | 28 (17.3%) | 0 |
| Decreased Appetite | 38 (23.5%) | <2% | 14 (8.6%) | <2% |
| Fatigue | 38 (23.5%) | <2% | 21 (13.0%) | <2% |
| COVID-19 | 37 (22.8%) | <2% | 17 (10.5%) | <2% |
| Headache | 34 (21.0%) | <2% | 22 (13.6%) | <2% |
| Leukopenia | 28 (17.3%) | 11 (6.8%) | 40 (24.7%) | 17 (10.5%) |
| Ocular Toxicities | 36 (22.2%) | 0 | 21 (13.0%) | 0 |

Key AEs are shown in **bold**. AEs were assessed per CTCAE V5. Neutropenia, thrombocytopenia, stomatitis/mucosal inflammation, anemia, hyperglycemia, diarrhea, nausea and rash were assessed as medical concepts using grouped terms

AE. adverse event; ALT. alanine aminotransferase; AST. aspartate aminotransferase; Fulv. fulvestrant; Inavo. inavolisib; Palbo. palbociclib; Pbo. placebo.

INAVO 120: Overview of adverse events

| Patients with ≥1 AE, n (%) | Inavo+Palbo+Fulv (n=162) | Pbo+Palbo+Fulv (n=162) |
|--|-----------------------------|---------------------------|
| All, n (%) | 160 (98.8%) | 162 (100%) |
| Grade 3–4 AE | 143 (88.3%) | 133 (82.1%) |
| Grade 5 AE* | 6 (3.7%) | 2 (1.2%) |
| Serious AE | 39 (24.1%) | 17 (10.5%) |
| AEs leading to discontinuation of treatment | 11 (6.8%) | 1 (0.6%) |
| Inavolisib/Placebo | 10 (6.2%) | 1 (0.6%) |
| Palbociclib | 8 (4.9%) | 0 |
| Fulvestrant | 5 (3.1%) | 0 |
| AEs leading to dose modification/interruption of treatment | 134 (82.7%) | 121 (74.7%) |
| Inavolisib/Placebo | 113 (69.8%) | 57 (35.2%) |
| Palbociclib | 125 (77.2%) | 116 (71.6%) |
| Fulvestrant | 52 (32.1%) | 34 (21.0%) |

AEs were assessed per CTCAE V5

* None of the grade 5 AEs were reported as related to study treatment by investigators. The grade 5 AEs reported were cerebral haemorrhage; cerebrovascular accident, gastrointestinal haemorrhage, acute coronary syndrome, death and COVID-19 in the inavo+palbo+fulv arm and COVID-19 pneumonia and cardiac arrest in the pbo+palbo+fulv arm.

AE, adverse event; Fulv, fulvestrant; Inavo, inavolisib; Palbo, palbociclib; Pbo, placebo.

Gedatolisib Phase 1b Data and Current Ph 3

VIKTORIA-1: Phase 3: Study Schema

HER+/HER2- ABC
N=701

PIK3CA WT
N=351

PIK3CA mut
N=350

ARM A
Ged+palb+fulv

ARM D
Ged+palb+fulv

ARM B
Alpel+fulv

ARM E
Alpel+fulv

ARM C
Ged+fulv

ARM F
Ged+fulv

R
1:1:1

R
3:3:1

Key Inclusion Criteria Include:

- 2 ≤ lines of ET in the met setting
- No prior chemo in the adv setting
- Prior tx with AI+CDK4/6

Phase 1b Data

| Arm | Total Expansion Arms (N=103, full analysis set) | | | |
|---|---|------------------|-------------------------|-------------------------|
| | Expansion | | | |
| | A | B | C | D |
| Prior Therapy | 1L: CDKi- naive | 2L+: CDKi- naive | 2L/3L: CDKi- pretreated | 2L/3L: CDKi- pretreated |
| n (Full, response evaluable) | 31, 27 | 13, 13 | 32, 28 | 27, 27 |
| Study Treatment | P + L + G | P + F + G | P + F + G | P + F + G |
| Gedatolisib schedule | weekly | weekly | weekly | 3 weeks on/1 week off |
| Median DOR, months (95% CI) ³ | NR (22.2, NR) | 12.2 (3.7, 40.6) | 16.6 (3.7, 30.3) | 12.6 (7.3, 21.2) |
| ORR ¹ (evaluable) | 85% | 77% | 36% | 63% |
| mPFS ² , mos (range) | NR (16.9, NR) | 12.9 (7.6, 38.3) | 5.1 (3.3, 7.5) | 12.9 (7.4, 16.7) |
| Median Follow Up ² , mos (range) | 33.1 (0.0+, 40.3+) | NE (2.1+, 42.5) | NE (0.0+, 32.1) | 29.0 (1.7, 31.6+) |
| PFS % at 12 mos ² | 72.1% | 22.1% | 23.6% | 53.2% |

¹Response evaluable analysis set per RECIST v1.1 including uPR; ²full analysis set; ³Kaplan Meier method and confidence intervals by the Brookmeyer and Crowley Method; Abbreviations: 1L= first line, 2L= second line; mos= months; NR = not reached; NE = could not be estimated per reverse KM method; DOR, duration of response; ORR, objective response rate; PFS, progression free survival; +=censored

Table 3: Treatment Related and Emergent Adverse Events (≥20% of subjects, by SOC and preferred term)

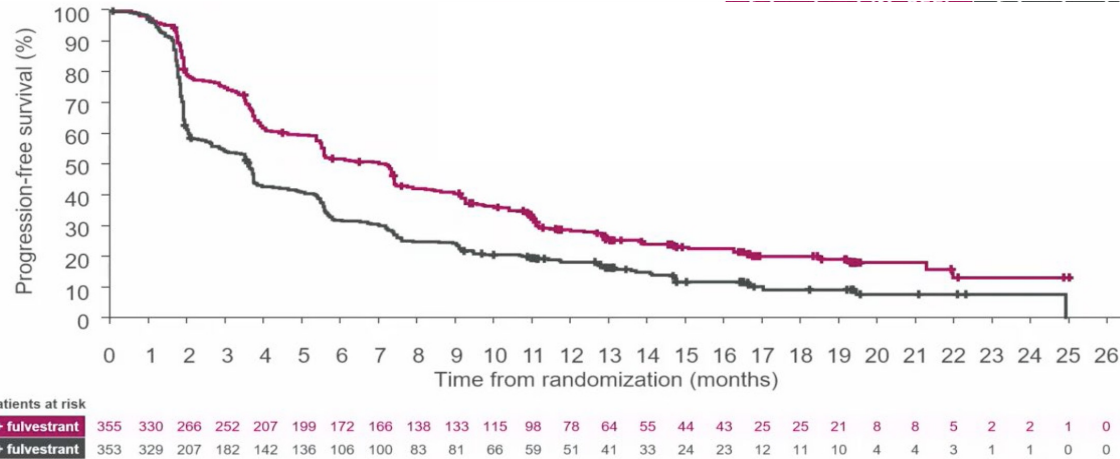
| Adverse Event | All Expansion Arms (n=103) | | | |
|---|----------------------------|-----------|-----------|-----------|
| | Grade 1 % | Grade 2 % | Grade 3 % | Grade 4 % |
| Gastrointestinal disorders | | | | |
| Stomatitis ¹ | 19.4 | 41.7 | 27.2 | 0 |
| Nausea | 42.7 | 34.0 | 0 | 0 |
| Vomiting | 32.0 | 12.6 | 1.0 | 0 |
| Diarrhea | 23.3 | 8.7 | 2.9 | 0 |
| Dry mouth | 25.2 | 1.9 | 0 | 0 |
| Constipation | 20.4 | 4.9 | 1.0 | 0 |
| General disorders and administration site conditions | | | | |
| Fatigue | 21.4 | 35.9 | 10.7 | 0 |
| Skin and subcutaneous tissue disorders | | | | |
| Rash ^{2,3} | 21.4 | 10.7 | 20.4 | 0 |
| Pruritus | 13.6 | 7.8 | 4.9 | 0 |
| Metabolism and nutrition disorders | | | | |
| Decreased appetite | 23.3 | 8.7 | 0 | 0 |
| Hyperglycemia | 12.6 | 5.8 | 3.9 | 1.9 |
| Injury, poisoning and procedural complications | | | | |
| Infusion related reaction | 16.5 | 5.8 | 0 | 0 |

There were no Grade 5 treatment related TEAEs

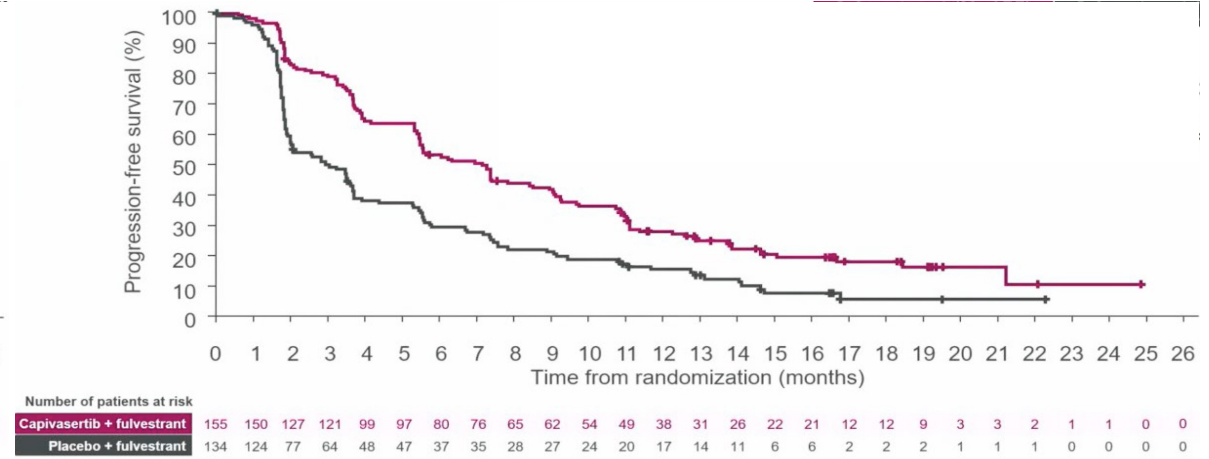
¹Prophylactic treatment for stomatitis was not implemented; ²Number of patients with at least one of the terms. If a patient experienced multiple terms, it will be counted once for the highest grade; ³Rash, Rash maculo-papular, Rash pruritic, Rash pustular, Rash papular, Rash erythematous, or Rash vesicular; ⁴Neutropenia and neutrophil count decrease were reported interchangeably for many patients. In this table, neutropenia (SOC-blood and lymphatic system disorders) and neutrophil count decreased (SOC-investigations) were combined

CAPItello-291 Phase 3 Trial of Capivasertib + Fulvestrant in AI-Resistant HR+/HER2- MBC: PFS

PFS by Investigator in Overall Population



PFS by Investigator in the AKT Pathway-Altered Population



| Overall Population | C+F (n=355) | P+F (n=353) |
|-------------------------|------------------|---------------|
| PFS events | 258 | 293 |
| Median PFS, mo (95% CI) | 7.2 (5.5-7.4) | 3.6 (2.8-3.7) |
| Adjusted HR (95% CI) | 0.60 (0.51-0.71) | |
| Two-sided P value | <0.001 | |

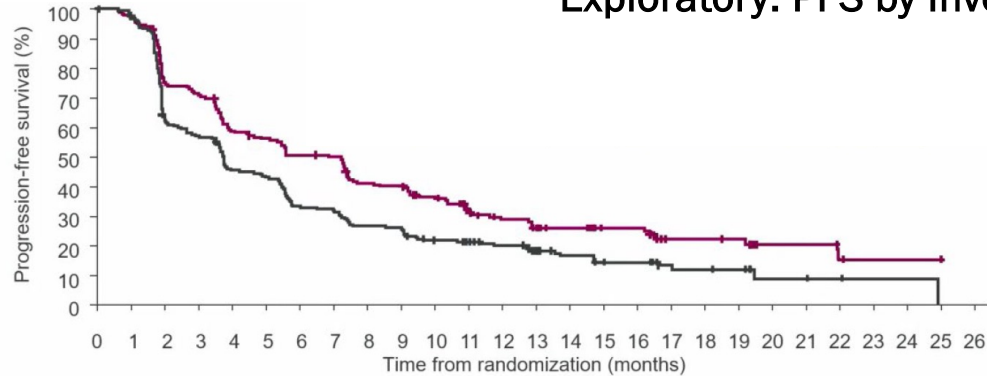
| AKT Pathway-Altered Population | C+F (n=155) | P+F (n=134) |
|--------------------------------|------------------|---------------|
| PFS events | 121 | 115 |
| Median PFS, mo (95% CI) | 7.3 (5.5-9.0) | 3.1 (2.0-3.7) |
| Adjusted HR (95% CI) | 0.50 (0.38-0.65) | |
| Two-sided P value | <0.001 | |

- PFS benefit was observed in all key subgroups, including regardless of prior use of CDK4/6i and liver metastases

HR was estimated using the Cox proportional hazard model stratified by the presence of liver metastases, prior use of CDK4/6i, and geographic region.

CAPitello-291 Phase 3 Trial of Capivasertib + Fulvestrant in AI-Resistant HR+/HER2- MBC: PFS (cont'd) and ORR

Exploratory: PFS by Investigator in the Nonaltered Population¹

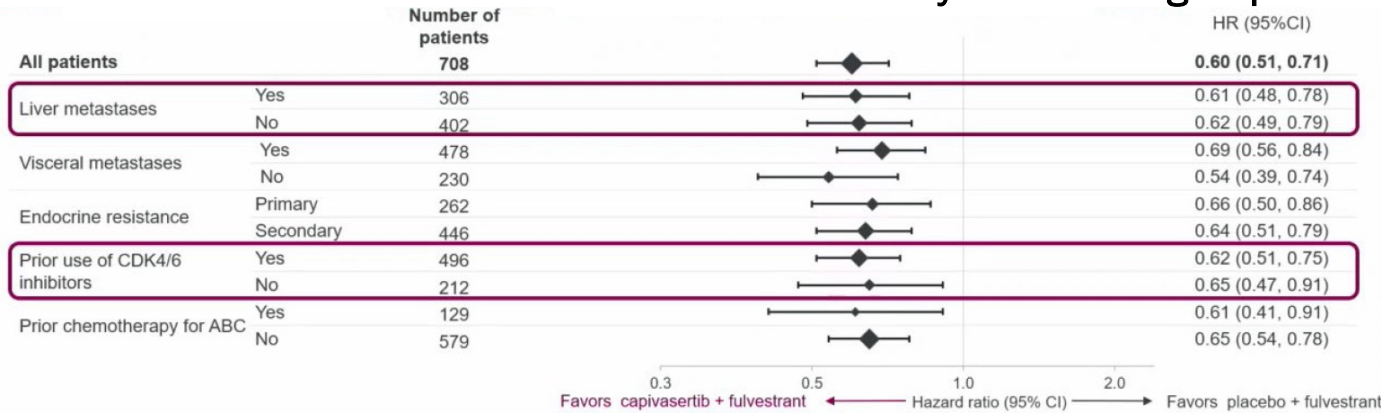


| Number of patients at risk | 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 |
|----------------------------|-----|-----|-----|-----|-----|-----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|
| Capivasertib + fulvestrant | 200 | 180 | 139 | 131 | 108 | 102 | 92 | 90 | 73 | 71 | 61 | 49 | 40 | 33 | 29 | 22 | 22 | 13 | 13 | 12 | 5 | 5 | 3 | 1 | 1 | 1 | 0 |
| Placebo + fulvestrant | 219 | 205 | 130 | 118 | 94 | 89 | 69 | 65 | 55 | 54 | 42 | 39 | 34 | 27 | 22 | 18 | 17 | 10 | 9 | 8 | 3 | 3 | 2 | 1 | 1 | 0 | 0 |

| Nonaltered Population | C+F (n=200) | P+F (n=219) |
|-------------------------|------------------|---------------|
| PFS events | 137 | 178 |
| Median PFS, mo (95% CI) | 7.2 (4.5-7.4) | 3.7 (3.0-5.0) |
| Adjusted HR (95% CI) | 0.70 (0.56-0.88) | |

- The nonaltered population included:
 - AKT pathway alteration **not detected**: C+F arm: 142/355 (40.0%), P+F arm: 171/353 (48.4%)
 - Unknown**: C+F arm: 58/355 (16.3%), P+F arm: 48/353 (13.6%)

INV-Assessed PFS by Select Subgroups in the Overall Population^{1,2}

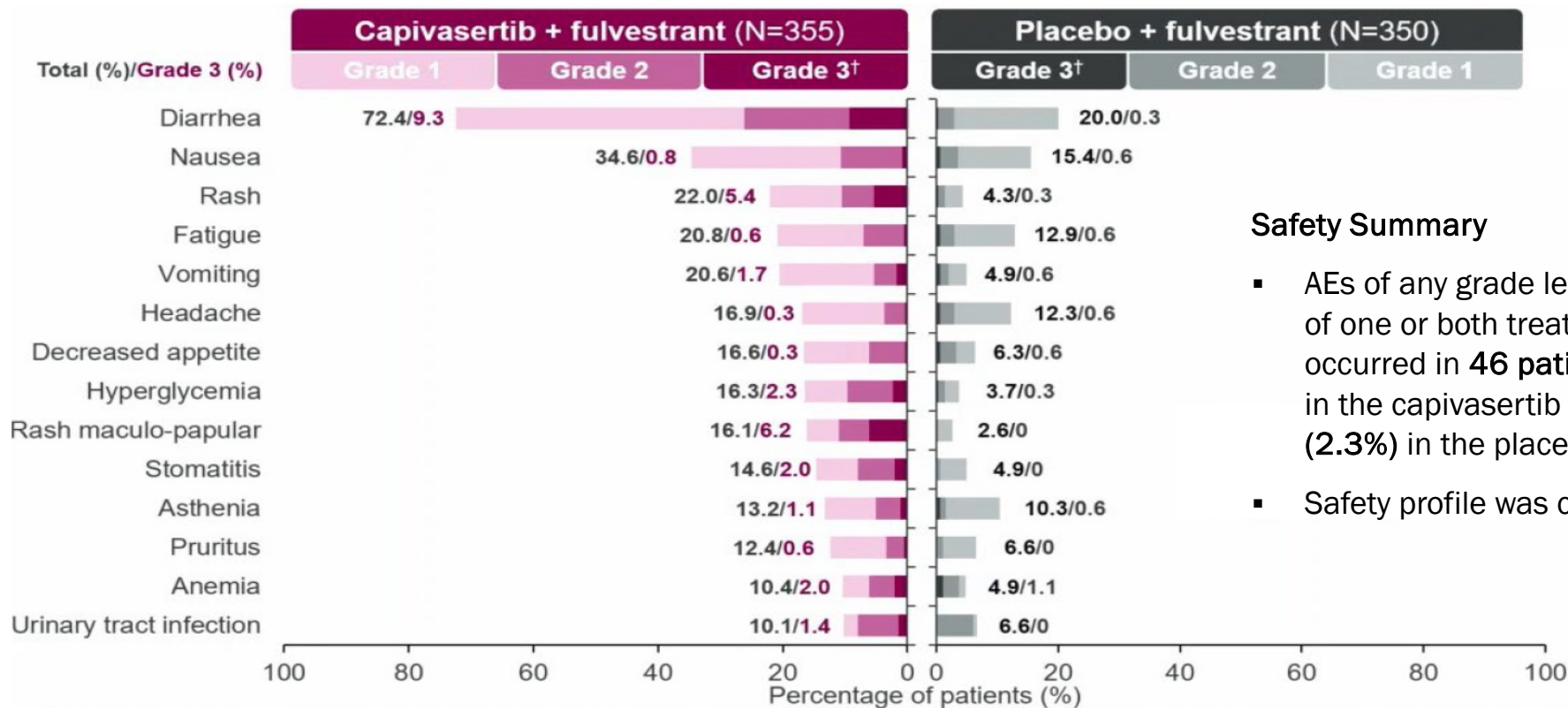


| mPFS (95% CI), mo | C+F | P+F |
|-------------------|-----------------|---------------|
| Prior CDK4/6i | | |
| Yes (n=496) | 5.5 (3.9-6.8) | 2.6 (2.0-3.5) |
| No (n=212) | 10.9 (7.4-13.0) | 7.2 (4.8-7.9) |
| Prior CT for MBC | | |
| Yes (n=129) | 3.8 (3.0-7.3) | 2.1 (1.9-3.6) |
| No (n=579) | 7.3 (5.6-8.2) | 3.7 (3.4-5.1) |
| Liver metastases | | |
| Yes (n=306) | 3.8 (3.5-5.5) | 1.9 (1.8-1.9) |
| No (n=402) | 9.2 (7.4-11.1) | 5.5 (3.9-5.8) |

HR was estimated using the Cox proportional hazard model stratified by the presence of liver metastases and prior use of CDK4/6i.

CAPitello-291 Phase 3 Trial of Capivasertib + Fulvestrant in AI-Resistant HR+/HER2- MBC: Safety

AEs (>10% of Patients) in Overall Population



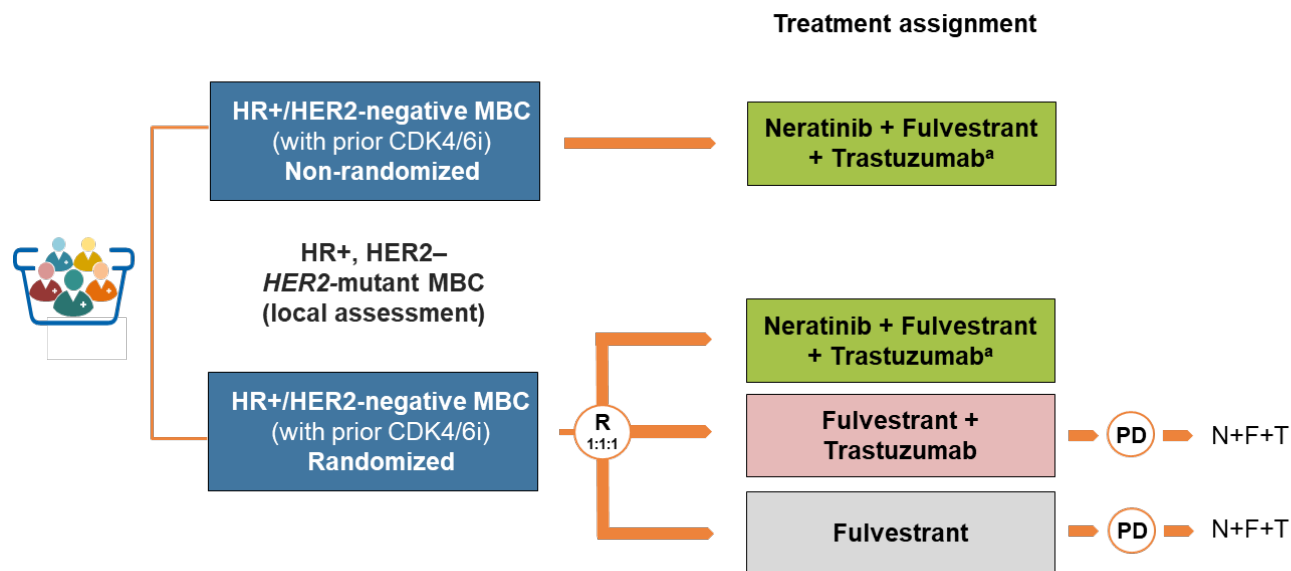
Safety Summary

- AEs of any grade leading to discontinuation of one or both treatments in the safety population occurred in **46 patients (13.0%)** in the capivasertib + fulvestrant arm and **8 patients (2.3%)** in the placebo + fulvestrant arm
- Safety profile was consistent with that previously reported

HER2 Mutation: Combinations needed for improved efficacy and durability

SUMMIT (NCT01953926): ER+ HER2- *ERBB2* mut Cohort

HER2 mutation: 8% ER+ MBC
15%: met ILC



^aLoperamide prophylaxis: oral 12 mg days 1–14, 8 mg days 15–18; as needed thereafter

HER2-mutant MBC

Primary endpoint

- Confirmed objective response rate (ORR; RECIST v1.1, centrally assessed)

Secondary endpoints

- Confirmed ORR (investigator-assessed)
- Duration of response (DOR)
- Clinical benefit rate (CBR)
- Progression-free survival (PFS)
- Safety and PROs

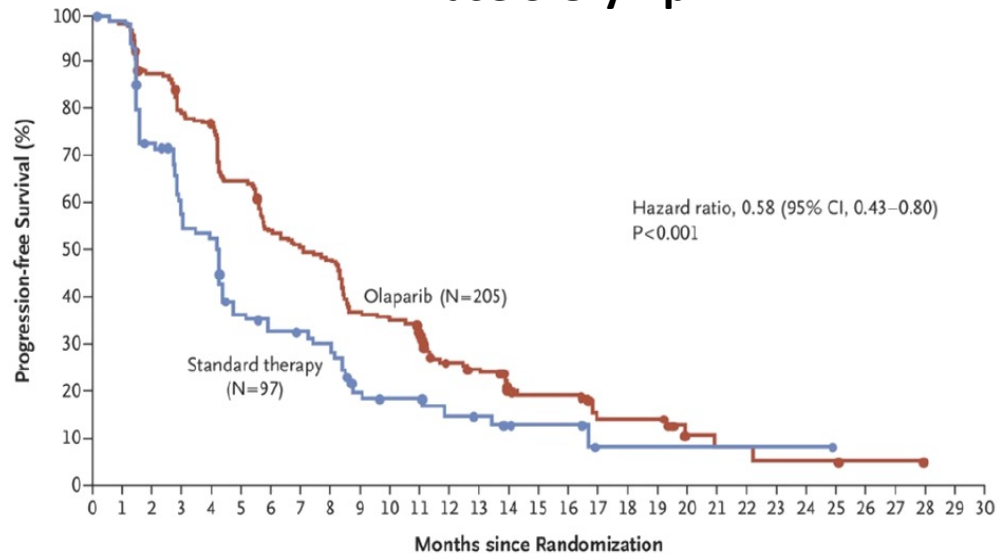
| Treatment Regimen | ORR | PFS (months) | DOR (months) |
|---|--------------|--------------|--------------|
| Neratinib (n=23) | 17% | 3.6 | 6.5 |
| Neratinib + Fulvestrant (n=47) | 30% | 5.4 | 9.2 |
| Neratinib + Fulvestrant + Trastuzumab (n=51) | 35.3% | 8.2 | 14.3 |

- Tucatinib + Trastuzumab Basket Study (NCT04579380)
- BDTX0819 Potent and Selective Inhibitor of the Allosteric Oncogenic ErbB Family (NCT04209465)
- Trastuzumab Deruxtecan: DESTINY-pantumor01 (NCT04639219)

Addition of T to N prolongs suppression of HER3 phosphorylation in HR+, HER2-negative, *HER2*-mutant breast cancer cell line model

PARP Inhibitors US FDA Approved for gBRCA mutant MBC

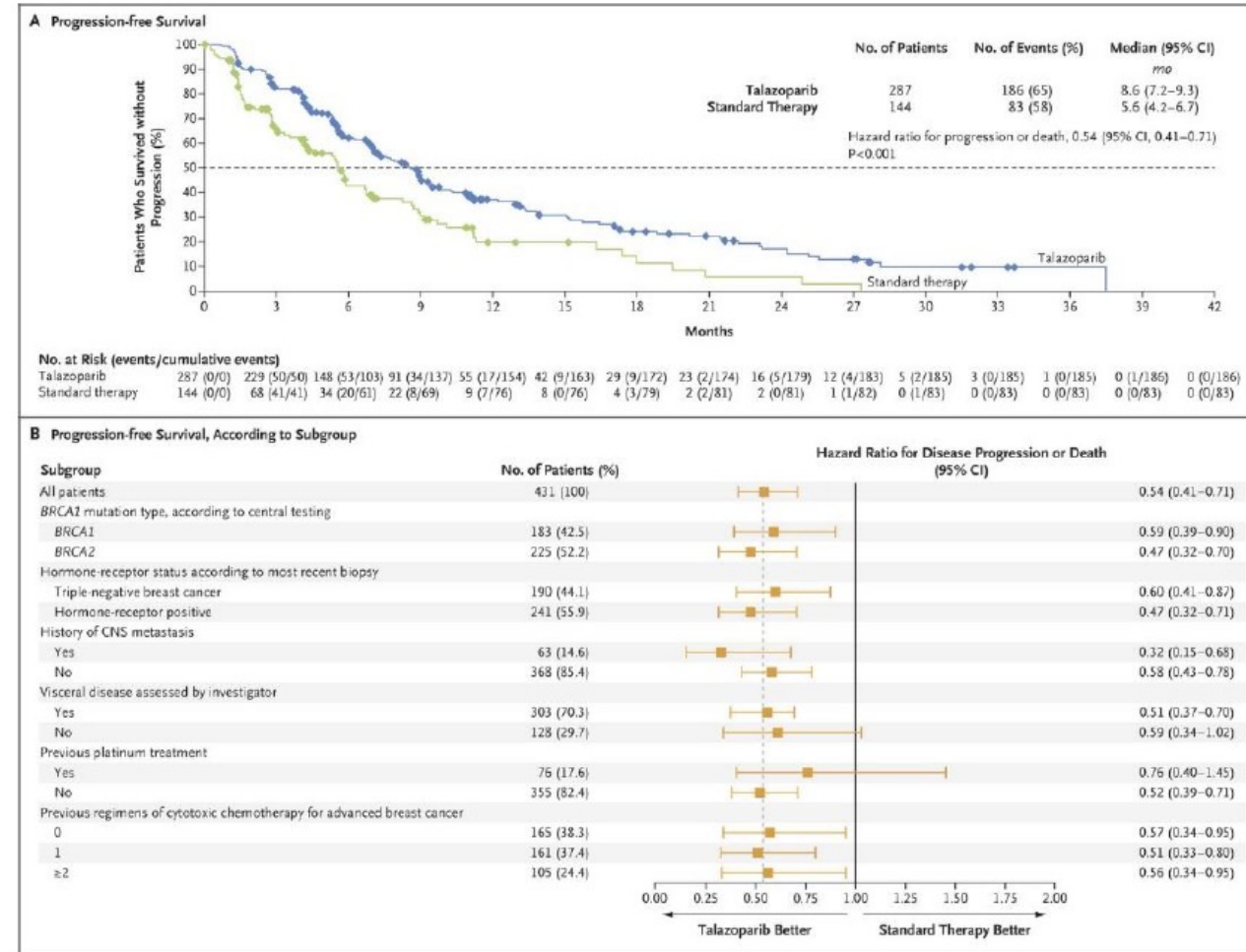
Olaparib Phase 3 OlympiAD



No. at Risk

| | 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 |
|------------------|-----|-----|-----|-----|-----|-----|-----|-----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|
| Olaparib | 205 | 201 | 177 | 159 | 154 | 129 | 107 | 100 | 94 | 73 | 69 | 61 | 40 | 36 | 23 | 21 | 21 | 11 | 11 | 11 | 4 | 3 | 3 | 2 | 2 | 1 | 1 | 1 | 0 | | |
| Standard therapy | 97 | 88 | 63 | 46 | 44 | 29 | 25 | 24 | 21 | 13 | 11 | 11 | 8 | 7 | 4 | 4 | 4 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 0 | 0 | 0 | 0 | | | |

Talazoparib Phase 3 EMBRACA



Improvement in PFS with PARPi compared with chemotherapy

Benefit regardless of subgroup

TBCRC 048: A Phase 2 Study of Olaparib in MBC With Germline or Somatic Mutations in Homologous Recombination Pathway Genes

Germline (Cohort 1)

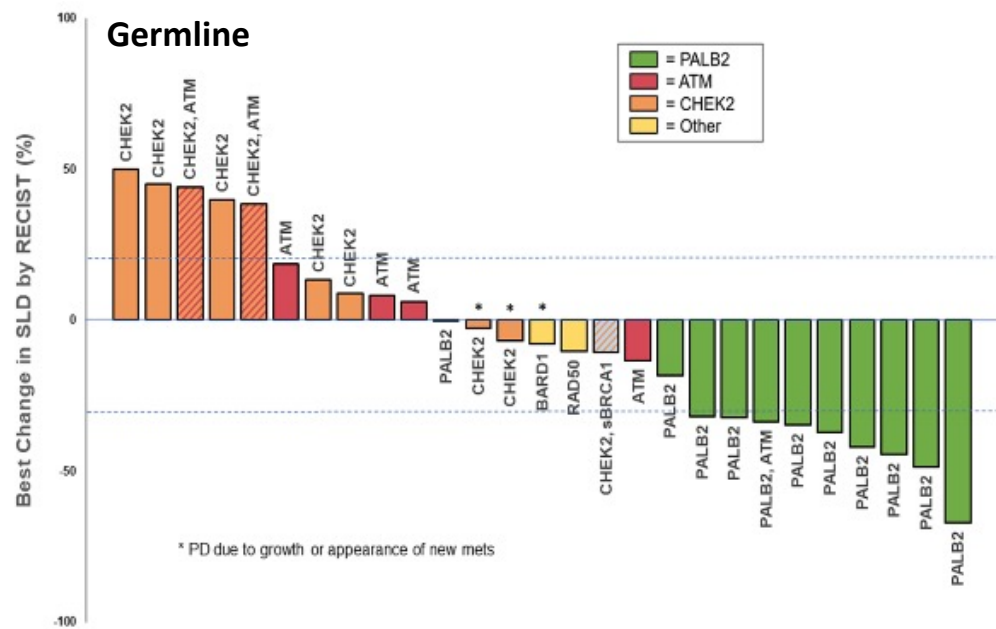
Somatic (Cohort 2)⁴

- *CHEK2*^{1,2} n=8
- *ATM* n=4
- *ATM & CHEK2*¹ n=2
- *PALB2*³ n=11
- *BARD1* n=1
- *RAD50* n=1

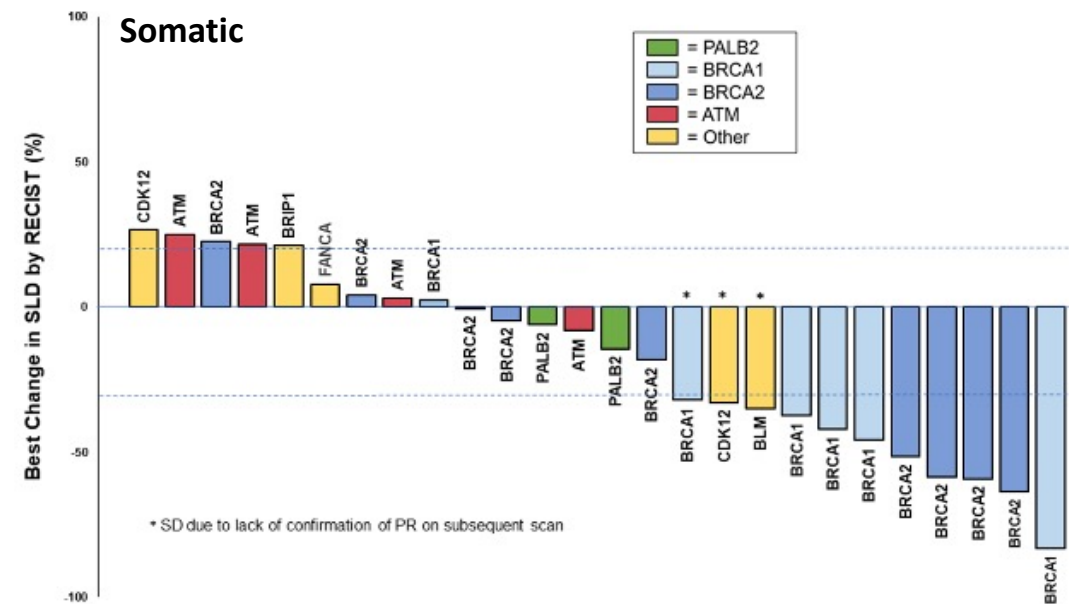
14 *ATM*
CHEK2

- *sBRCA1*⁵ n=6
- *sBRCA2* n=9
- *ATM*⁶ n=4
- *PAL2* n=2
- *CDK12* n=2
- *BRIP1* n=1
- *BLM* n=1
- *FANCA* n=1

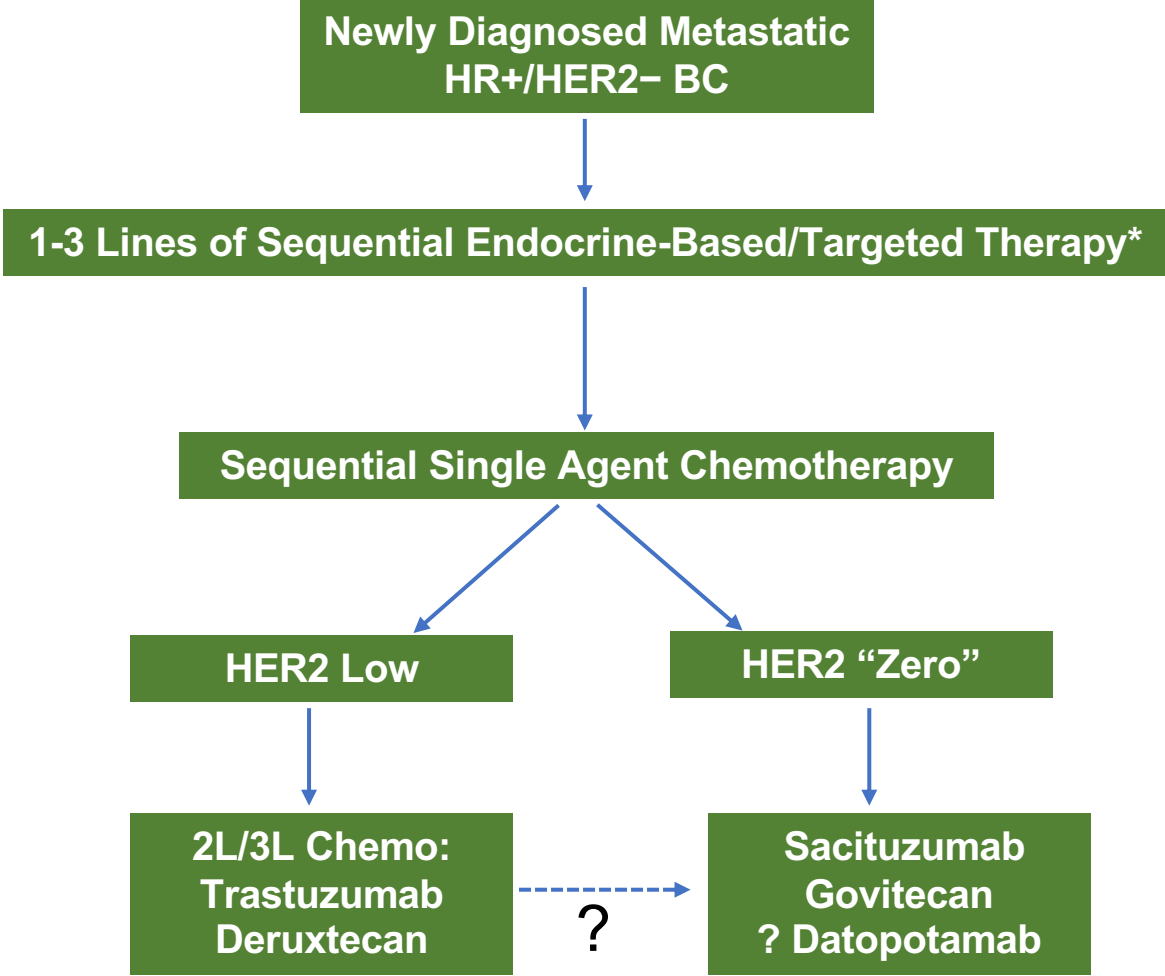
15 *sBRCA1/2*



| <i>PALB2</i> N=13 | <i>sBRCA1/2</i> N=17 [^] | <i>ATM & CHEK2</i> ^{**} N=17 |
|---|--------------------------------------|--|
| Germline: 9/11 PR (82%) 10/11 had tumor regression; 1 SD > 1 yr | 8/16 PR (50%) | 0/13 germline 0/4 somatic |
| Somatic: 0/2 – both SD* (limited assessments) | | |



Treatment Roadmap for HR+/HER2- MBC Today in Clinic



- 1L: - AI/SERD + CDK4/6i
- 2L or 3L:
 - SERD + PI3Ki (*PIK3CA* mutant)
 - Oral SERD (*ESR1* mutation)
 - ET + mTORi
 - ET + AKTi (*PIK3CA/AKT/PTEN* alteration)
 - SERD + CDK4/6i
 - ET
- 1L-3L: - *gBRCA1/2+*: PARPi
- ≥ 2L:
 - Larotrectinib/Entrectinib (*NTRK* fusion)
 - Pembrolizumab (MSI-H/dMMR, high TMB)
 - Selpercatinib (RET alterations)

*Chemotherapy for visceral crisis.

Key Messages

▪ Approach to treatment post CDK4/6i progression needs further refinement

- Elacestrant approved for *ESR1m*
- PARPi approved for *gBRCAm*
- Neratinib + trastuzumab + Fulvestrant for HR+ *HER2m* MBC (NCCN category 2b)
- Alpelisib with ET approved for *PIK3CAm*
- Capivasertib with Fulvestrant approved for *PIK3CA/AKT/mTOR* alterations
- Everolimus + ET Approved regardless of pathway mutation status
- Triplet of Inavolisib + Fulvestrant + Palbociclib might be approved for high risk *PIK3CAm* in 1L?
- CDK4/6i beyond progression- phase 3 data awaited
- Optimal sequencing of these agents?
- Mechanisms of resistance for mTOR and AKTi?

▪ Novel endocrine agents better than prior approved ET

- Have a role as monotherapy in ET sensitive *ESR1* mutant
- Attractive partner of choice with other targeted agents

Acknowledgements

Patients and their families who inspire us everyday

Questions?

