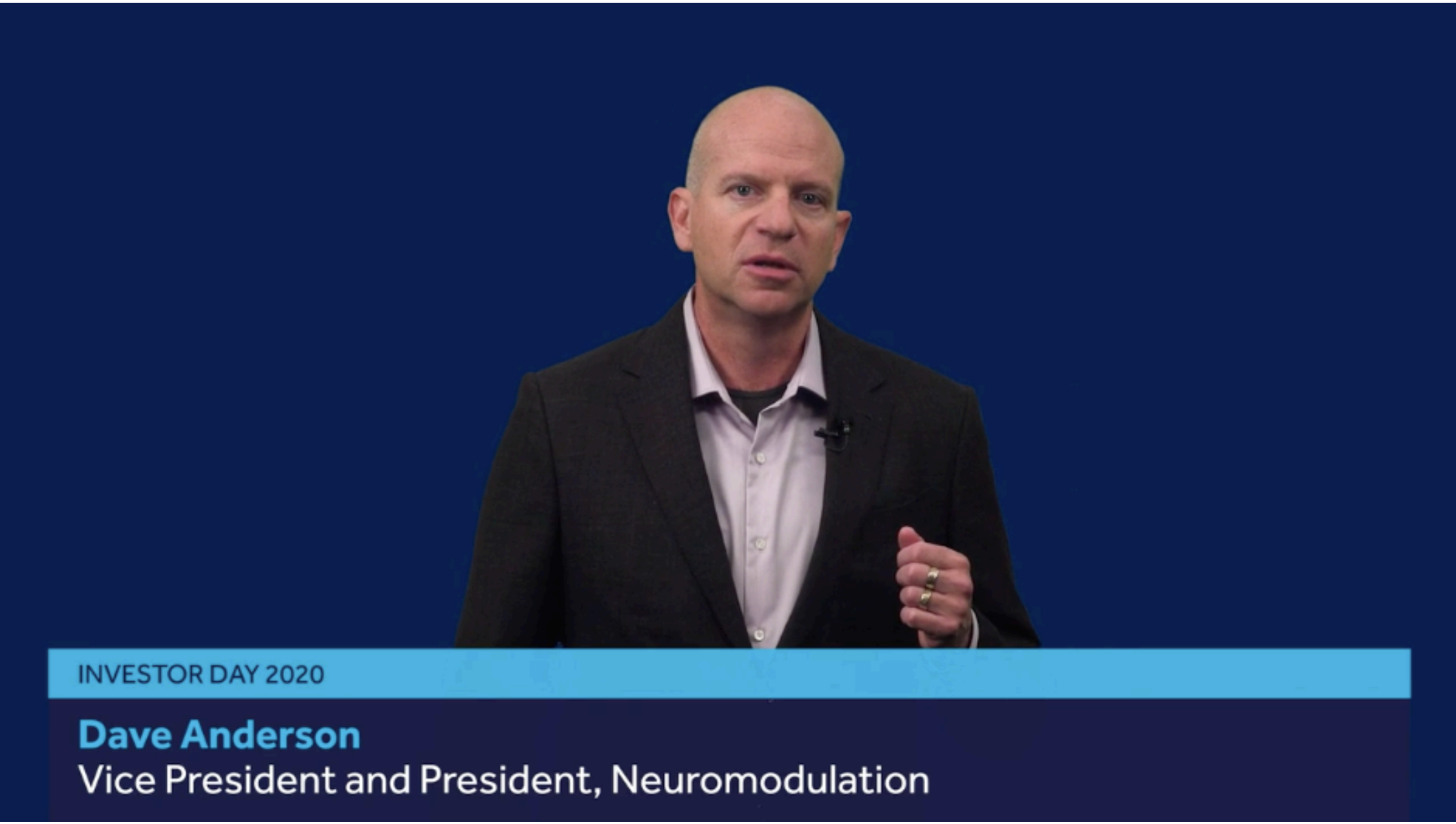
Neuromodulation
Selected Graphics

Medtronic

2020 Institutional Investor & Analyst Day

October 14, 2020


INVESTOR DAY 2020
Dave Anderson
Vice President and President, Neuromodulation


Heavy technology investment
Poised to accelerate growth and take share


Transformational
innovations launching
in DBS and Pain Stim.

	MEDTRONIC Percept™	ABBOTT Infinity™	BOSTON SCIENTIFIC Vercise™
BrainSense™ Technology	●	○	○
3T MRI	●	○	○
Smart Battery	●	○	○
Digital Diary	●	○	○
Directional DBS System	**FY22**	●	●

Transforming DBS

ADAPT CLINICAL TRIAL

DBS Clinician Programmer

FY19

FY20

DBS Patient Programmer

Percept™ PC
with BrainSense™

FY21

Activa™ RC
with wireless recharger

SenSight™
directional lead with visual programming

FY22

Percept™ RC
with BrainSense™

Beyond

Percept™ PC, RC
with ADAPTIVE DBS

Remote Access & Control Capabilities

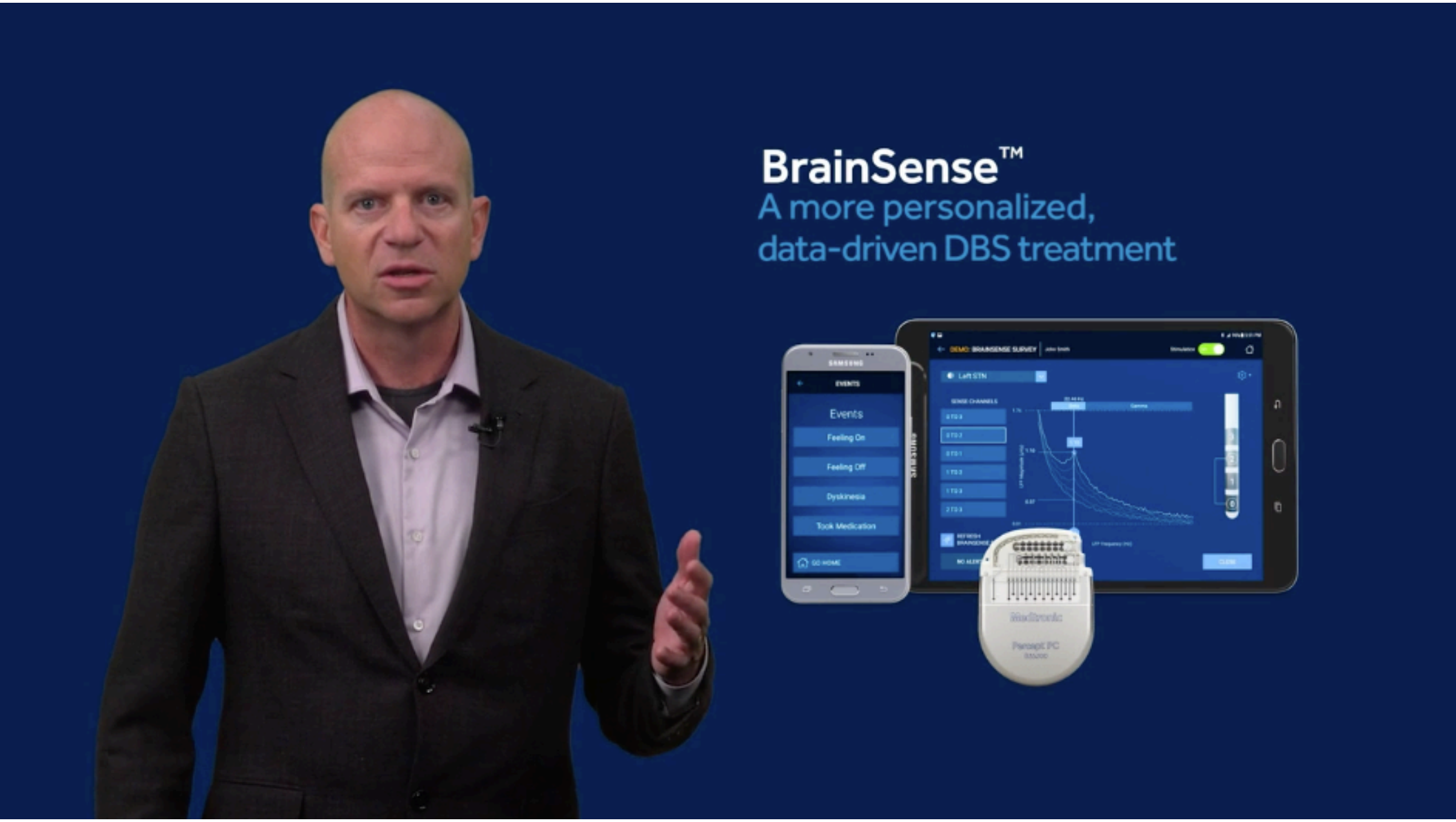
PATIENT HOME


"Percept™ PC with BrainSense™ technology is a game changer."
— Prof. Dr. med. Andrea Kühn
Charité University Hospital


"We can now more precisely tailor therapy to the individual needs of each patient based on data from neuronal activity."
— Bryan Klassen, M.D.
Mayo Clinic

"We're excited by new treatments and clinical advancements that let people with Parkinson's live fuller, complete, lives."

— John L. Lehr,
President & CEO,
Parkinson's Foundation


BrainSense™
A more personalized,
data-driven DBS treatment
Events
Feeling On
Feeling Off
Dyskinesia
Took Medication

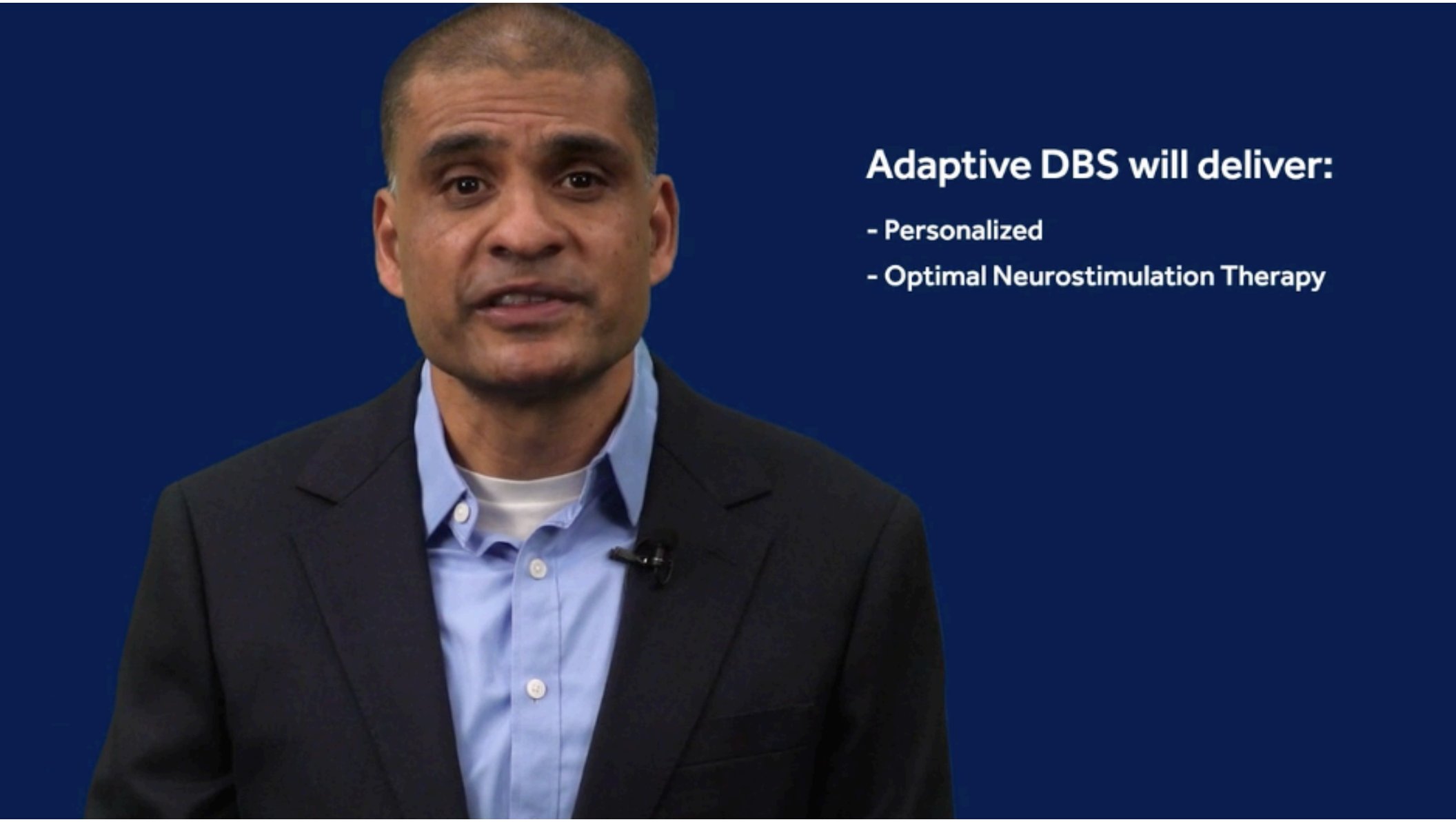

MARK RICHARDSON, MD, PhD
Director of Functional Neurosurgery
Massachusetts General Hospital
Paid Medtronic Consultant

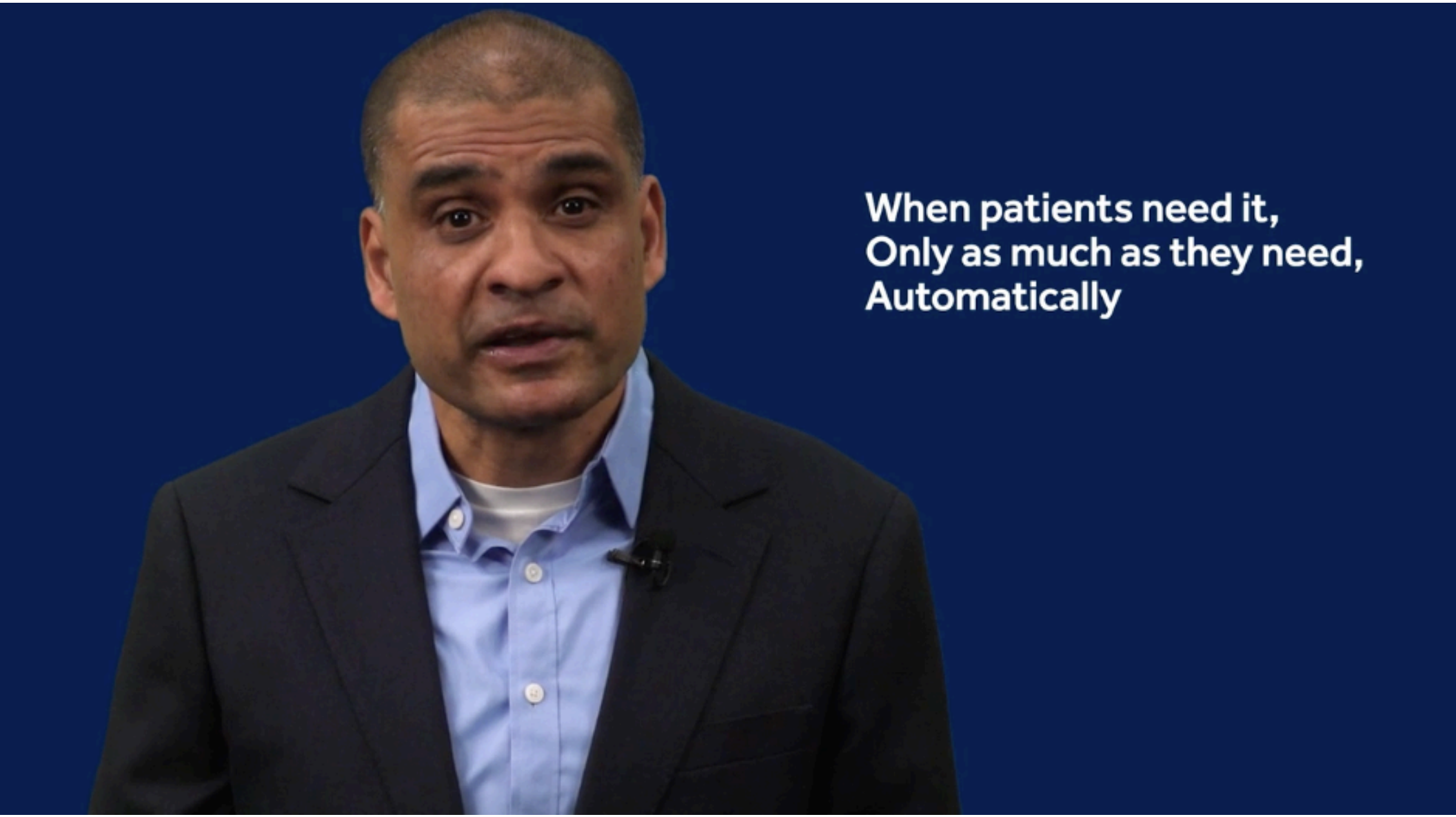

DEMO: LEFT STN BRAINSENSE SETUP
John Smith
74% 5:31 PM
Stimulation On
BrainSense Setup
Thresholds
Signal Test
Sep 9, 2019
REFRESH SIGNAL TEST
Sensing Setup - Electrode Configuration
Tap Save Sensing or Thresholds to update electrodes for both therapy and sensing.
Left STN
Active Therapy
Beta Signal Selected
22.46 Hz
Beta Signal Selected
13.67 Hz
Beta Signal Selected
15.63 Hz
REVIEW
REVIEW
REVIEW
ADVANCED SETTINGS
NO ALERTS
SAVE SENSING
THRESHOLDS
SAMSUNG

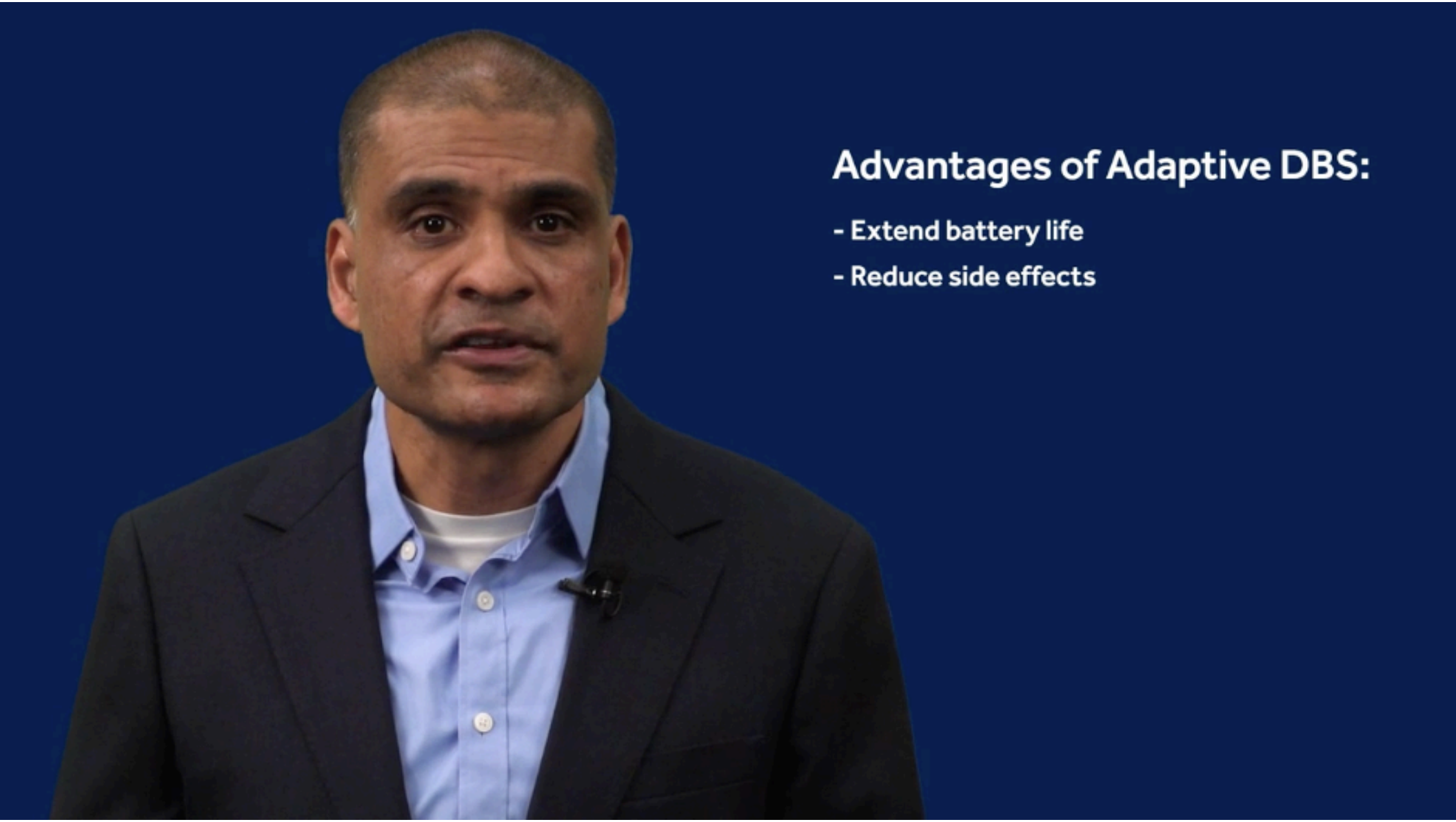

GETTING
BACK
TO YOU

UC202104995 EN


INVESTOR DAY 2020
Abhi Kulkarni
Vice President R&D Implantables


Adaptive DBS will deliver:
- Personalized
- Optimal Neurostimulation Therapy


When patients need it,
Only as much as they need,
Automatically

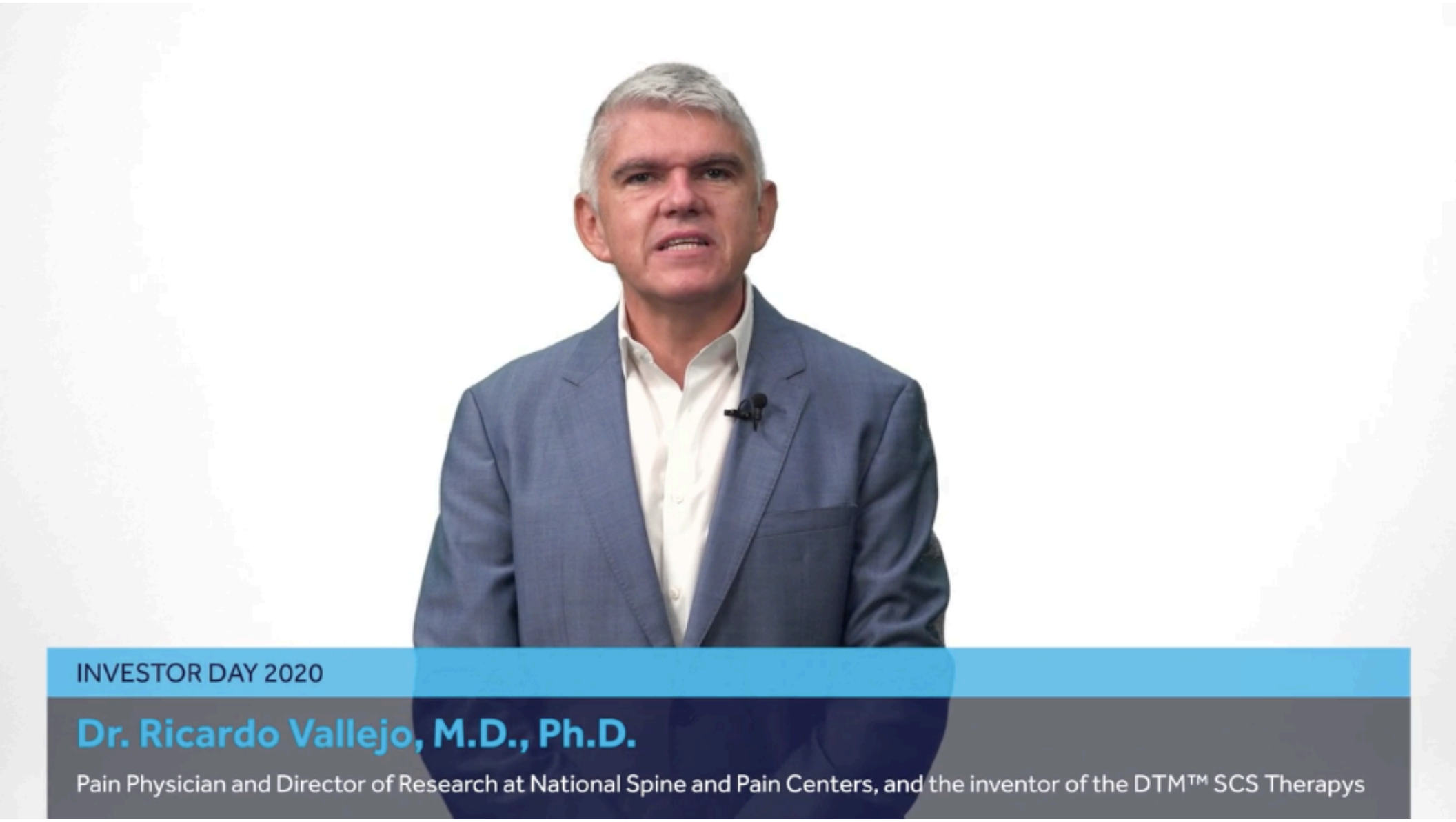

Advantages of Adaptive DBS:
- Extend battery life
- Reduce side effects


Changing DBS therapy forever


100M
Americans suffer
from chronic pain


HALF A TRILLION
Annual Cost


Chronic pain costs more than
Diabetes
Heart disease
and Cancer

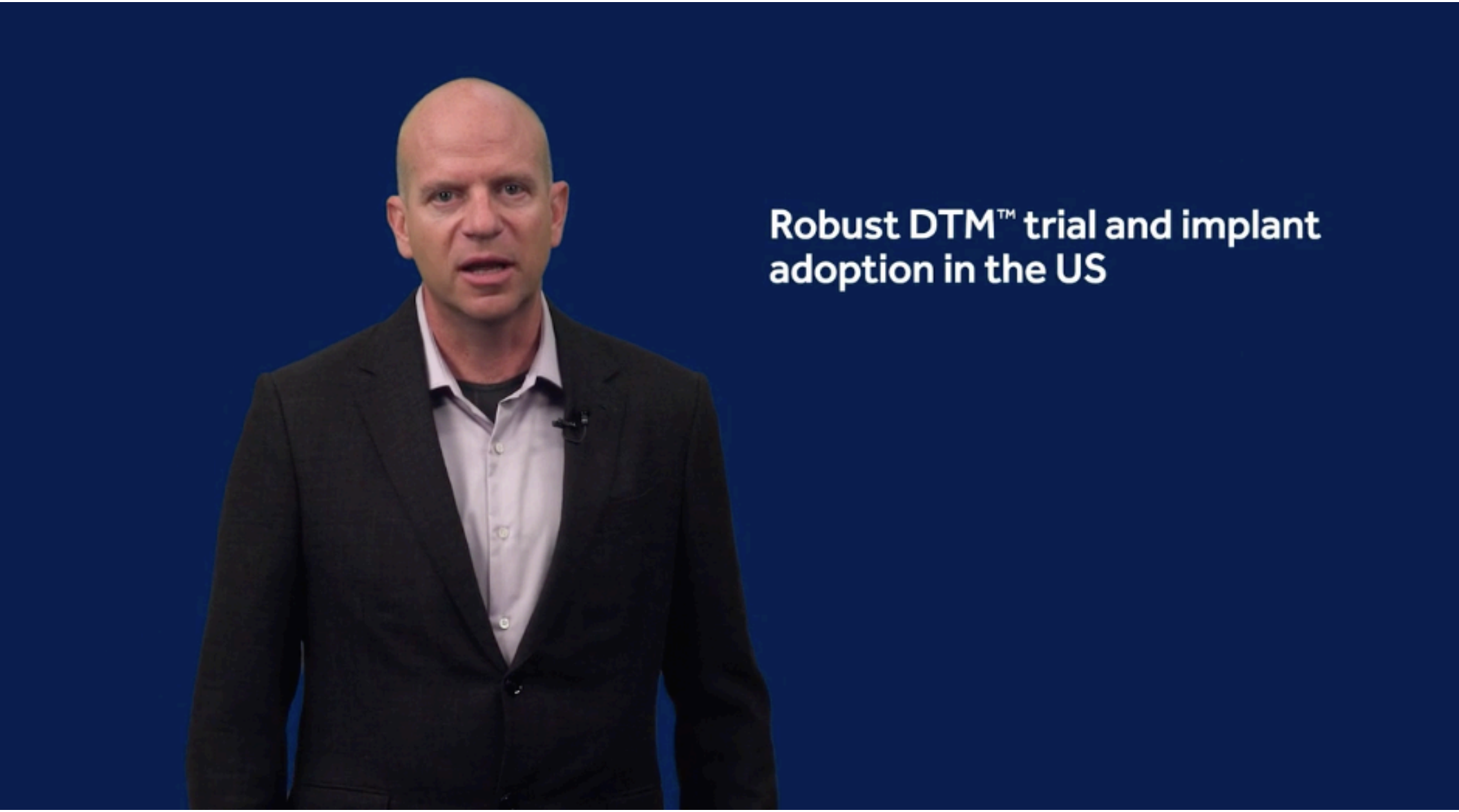

INVESTOR DAY 2020
Dr. Ricardo Vallejo, M.D., Ph.D.
Pain Physician and Director of Research at National Spine and Pain Centers, and the inventor of the DTM™ SCS Therapys


Superior back pain relief with DTM SCS
with DTM™ SCS (≥50% improvement)
Back pain responder rates at 3 months
100
90
80
70
60
50
40
30
20
10
0
80%
51%
P=0.0009
DTM SCS
Conventional SCS


63% of patients reported profound pain relief of 80% or more with DTM™ SCS, compared with 28% with conventional SCS
Back Pain Relief by Subject at 3 Months
63%
28%
-20
0
20
40
60
80
100
DTM
Conventional

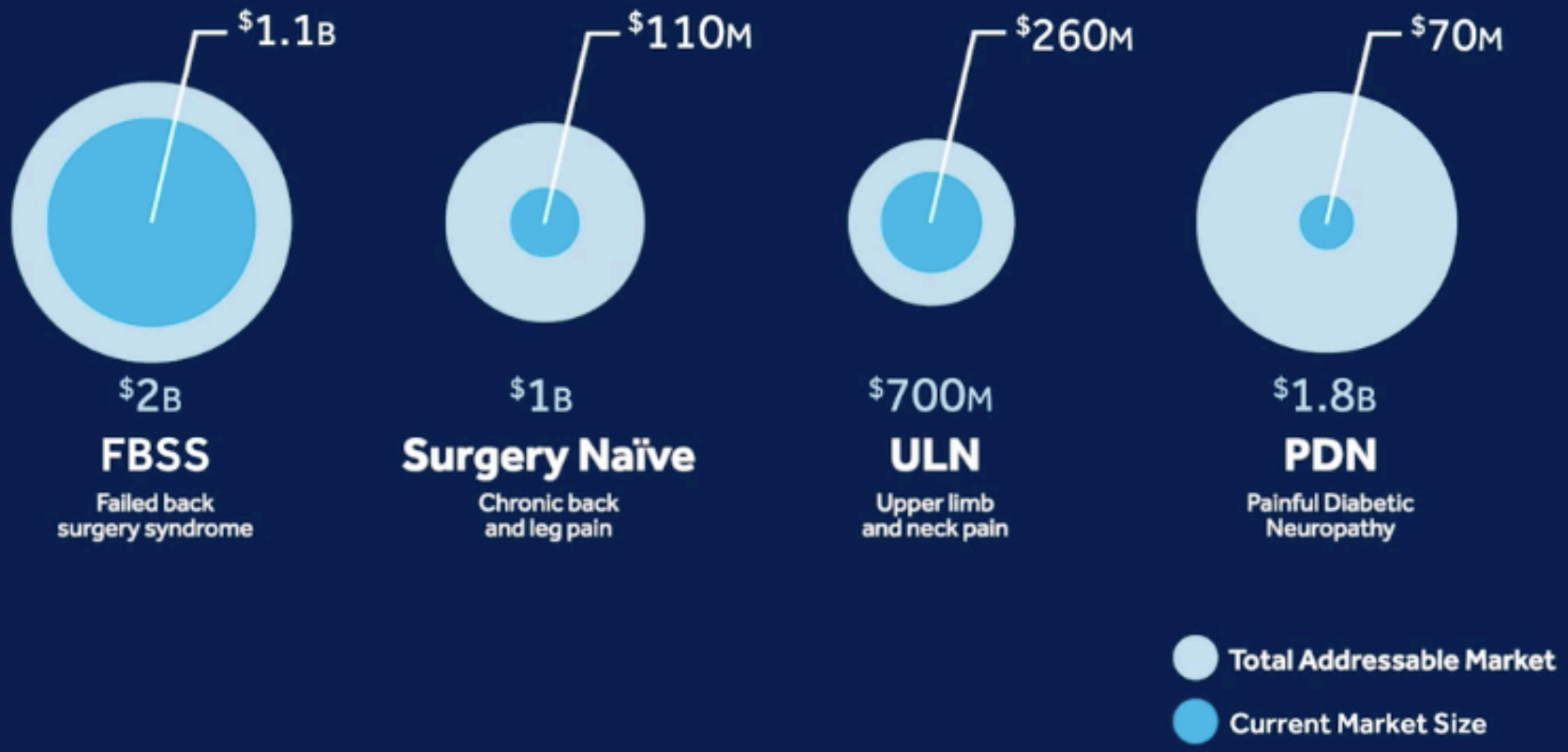

Medtronic Global Collaboration of Societies
World Premiere:
DTM(TM) SCS RCT 12-Month Data Reveal
October 19, 2020 7:00 pm CST
October 20, 2020 12:00 pm CST


Gained new implant share


Robust DTM™ trial and implant adoption in the US


Across all customer segments

Potential for Expanded Indications to Double the SCS Market



	MEDTRONIC Intellis™	NEVRO Senza® Omnia™	ABBOTT Proclaim™ XR	BOSTON SCIENTIFIC WaveWriter Alpha™
DTM™ SCS Differential Target Multiplexed	●	○	○	○
Smallest size INS	●	○	○	○
Broadest Full Body MRI Access	●	○	○	○
Industry leading battery technology with 9 year warranty	●	○	○	○


SHAUN M.
Patient receiving DTM™ SCS Therapy
on the Intellis™ Neurostimulator