



Predictive Wound Healing

AI + Multispectral Imaging =
Faster, More Accurate Treatment
Decisions in Healthcare

Nasdaq: MDAI | March 2024





AI-Driven wound assessment technology

designed to deliver value across the healthcare continuum



Supported by \$250M+

non-dilutive government funding



Large and growing addressable markets



Clear regulatory pathway



Limited competition



Strong competitive barriers to entry



17.5 Million

shares outstanding March 29, 2024



Annual Revenue

2023

\$18.1M

2024E

\$28M

Financial position at 12/31/2023

Cash **\$4.8M**

Long term debt **\$0M**

Intellectual property portfolio

20 issued

34 pending

Headquarters

Dallas, TX



Founded

2009



NASDAQ

MDAI



SINCE JANUARY 2024



Recent Accomplishments



Initiated U.S. pivotal Study to validate the **DeepView System for Burn**



Strengthened **Board and Management Team**



Secured **\$10M committed** equity facility



Received **UKCA classification** for DeepView AI®-Burn



Secured \$12.5M Convertible Instrument



Cumulative **proceeds of \$7.3M** through March 25, 2024 from equity facilities



Formed and funded **Spectral IP**



Deployed DeepView for UK customer evaluations



Revolutionizing Wound Care

- Our DeepView™ system enables healthcare providers to make more informed treatment choices.
- In a matter of seconds during the initial patient visit, DeepView™ **predicts¹ if the wound will heal or not**, with remarkable accuracy.

Delivering on Commitments



11-year track record

2013-2024

of meeting milestones validated by
\$250M non-dilutive government funding

- Proof of concept
- Clinical validation
- Product validation
- Product prototyping
- Pre-sub regulatory alignment



Prioritizing growth opportunities in profitable markets, positioning ourselves for near-term commercial success.



DeepView™ is a single platform supporting multiple indications.



Extensive portfolio of patents, trade secrets and “truthed” images are a significant barrier to competition.

OUR TECHNOLOGY



DeepView Imaging

Patented proprietary **multi-spectral imaging** data acquisition in milliseconds

Capturing injured **tissue spectral signature**

Covering visible near UV through visible spectrum and into near-IR light

Data extraction

Extraction of **AI model features**, such as tissue characteristics that determine health

Combined with **patient health matrix data**

AI model building

AI model trained and tested against a proprietary clinical database of **340+bn³** clinically validated data points

AI algorithm integrates image and clinical data for model training

Healing prediction

Accurate and immediate binary wound healing prediction in seconds

Predicting tomorrow's outcome today



Non-healing output

Decision: surgery or advanced wound care products



Healing output

Decision: Routine care



One Imaging Platform, Multiple Indications



INDICATIONS



Burn Wound

TAM \$3.7B¹⁷ - Anticipate selling



2024



2026



Diabetic Foot Ulcer

TAM \$11B¹⁸ - Anticipate selling



2025



2026



Potential Clinical Indications

Wound Bed Preparedness

Amputation

Digital Guided Therapy

Critical Limb Ischemia

Cosmetics

DeepView SnapShot® M | Handheld

Military anticipate selling



2026

Miniaturized
Mobile
Home Healthcare



UK Go to Market



Proof of Concept

Earlier entry into UK
provides opportunity to
demonstrate proof of concept
for broader U.S. markets.



Empowering healthcare providers with
predictive clinical insights for precise
treatment decisions in wounds.



DFU Indication

 DeepView™

PROBLEM

No diagnostic tool for DFUs, which are **complex** with a **non-linear** healing trajectory.

Inconsistent and subjective wound measurement

CURRENT SOLUTION

For DFUs, requires use of standard-of-care (SOC*) for 4 weeks

Two-thirds (2/3) of DFUs do not heal in 12 weeks.

Current clinical judgement is ~50%.⁵

OUR SOLUTION

Our solution is **86% accurate** in predicting if a diabetic foot ulcer will heal.^{4*}

Standardized, three-dimensional wound measurement.



This wound is not likely to heal by 50% within 4 weeks

The DeepView™ system analyzes multispectral images that combined with clinical data provides a healing prediction on Diabetic Foot Ulcer (DFU).



Width: 1.5 cm
Length: 1.5 cm
Depth: 0.2 cm
Area: 1.75 cm²
Volume: 0.45 cm³

DeepView™ difference

- Objective standardized digital measurements.
- DeepView™ predictive AI provides the right treatment for the right patient at the right time.
- Leading to anticipated reduction of costs and improved patient outcomes.



Burn Indication



PROBLEM

No existing diagnostic tool for burn leading to uninformed decisions. Burn evaluation relies on visual examination and subjective judgement, often leading to inaccuracies.

CURRENT SOLUTION

Standard of care is to wait up to 21 days to determine need for surgery.⁶



OUR SOLUTION

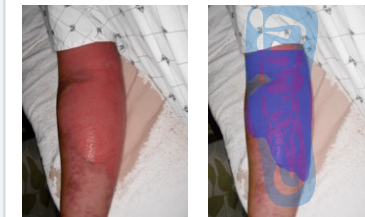
Burn professional healing accuracy prediction is 50% (generalist) to 75% (specialist).

92% accurate in seconds for DeepView.^{7 8}



This burn will not heal

The DeepView™ system analyzes multispectral images that combined with clinical data provides a healing prediction on burn wounds.













DeepView™ difference

- Reduces time to surgery⁸
- Avoids unnecessary surgeries⁹
- Unnecessary burn center transfers.¹⁰
- Uniformed standardized TBSA measurements



Targeting Multiple Care Centers

	 Burn Centers 125	 Emergency Department 4,500	 Wound Care Centers 1,100	 Podiatry 4,000+
Burn				
DFU				

	 Burn Centres 40	 Trauma Centres 25	 A&E 230	 Foot Protection Service 150	 ICS Foot & Ankle 40	 Community Nursing 500
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Commercial strategy includes parallel paths

Key Steps to Successful Market Access

PUBLICATIONS



AI methodology & machine learning



Patient outcomes; provider behavior change

HEALTH ECONOMICS

Measuring ROI across time, money, and patient outcomes

REIMBURSEMENT



CPTIII code



CPTI code

REGULATORY



De Novo/510k



CA Mark



Prospective clinical evidence with health economics and outcomes will quantify the system benefits



Burn

Standardized
Wound
Measurement
for TBSA

Decrease
Unnecessary
Transfers

Decrease
Time to
Surgery

Decrease
Unnecessary
Surgery

Anticipated Benefits

- **Standardized total body surface area (TBSA) measurement**
- **41% reduction** in unnecessary transfer¹³
- **Unnecessary surgery admission costs reduction** per patient of \$58,315^{14 15}
- **3+ day reduction time to surgery** for burns^{14 16} (>30% reduction in LOS)



DFU

Standardized
Wound
Measurement

Decrease
Patient
Journey

Optimize
Provider
Resources
and Time

Decrease
Total Cost of
Care of DFU
Patient

Healing at 4 weeks?^{11 12}

60% YES ✓

• Standardized digital documentation

40% NO ✗

- Savings of office visits & treatment materials
- Savings of HCP time
- Reduction in patient journey

BARDA SUPPORT OVER THE YEARS

Management’s track record through years of BARDA engagement validates and increases probability of success for DeepView™ across clinical indications (Burn and DFU) and geography (U.S., UK, EMEA).

2013 Burn I	2019 Burn II	2023 Procurement Contract Base	2025+ Procurement Contract Options
\$26M	\$75M	\$55M	\$95M
Proof of Concept	Research Testing	Regulatory Manufacturing Commercial Readiness	Commercialization Procurement

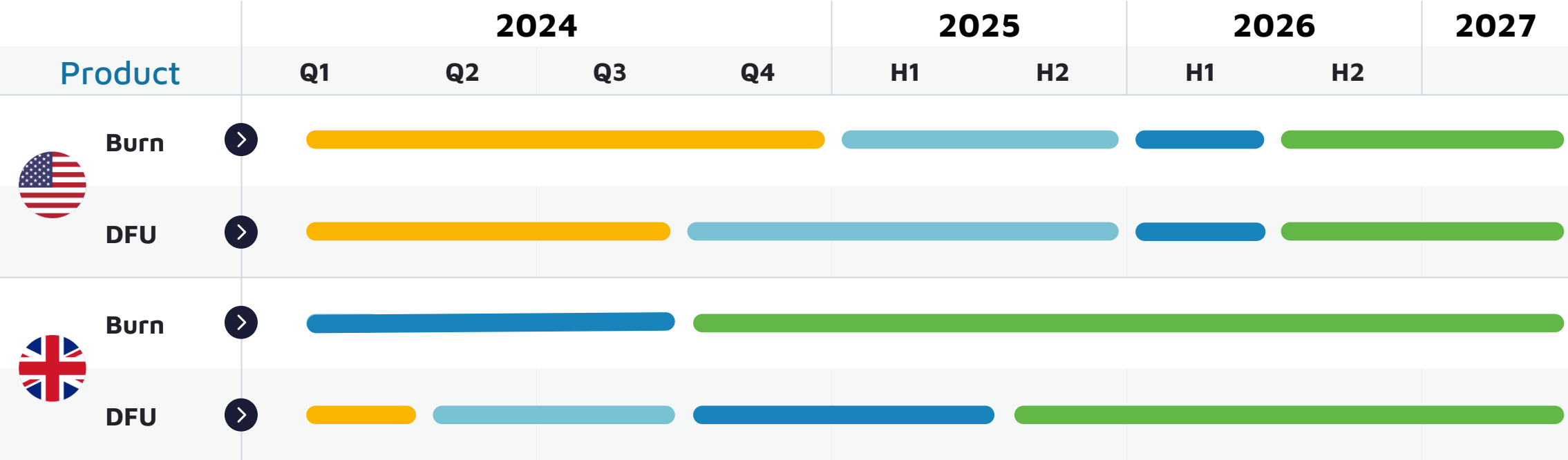


\$250M

TOTAL



Planned near-term product deployments



Includes annual license fee and one-time device sale

U.S. Device Sales

- One-time transaction per site/user
- Unit pricing still being determined
- Expect DFU 1H 2026; Burn in 2H 2026
- Potential exists for sale or lease in certain segments

UK Device Sales

- One-time transaction per site/user
- Unit pricing still being determined
- Expect DFU 2H2025; Burn in 2H2024
- Potential exists for sale or lease in certain segments

U.S. R&D

- BARDA PBS Contract includes \$55M R&D revenue spread across 4Q23 - 1Q26
- Modest additional R&D revenue from MTEC in 2024

U.S. AI License

- Annual license fee for use of AI data
- Separate license for each indication
- Pricing still being determined

UK License

- Annual license fee for use of AI data
- Separate license for each indication
- Pricing still being determined



Intellectual Property

20

Allowed U.S.
and international
patents



34

Pending U.S. and
international
patent applications



Useful life on key patent protection on core concepts exceeds 14 years



Improving health and cost outcomes for all



Clinician

- Informed treatment decisions
- Increased efficiency



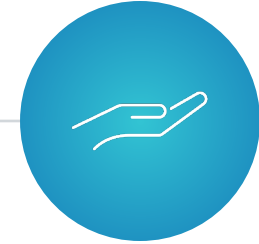
Care Facility

- Uniformed clinical decisions
- Equality of care
- Improved efficiency
- Government digital initiatives



Patient

- Reduced treatment time for patients and caregiver burden
- Reduced infection and treatment complications
- Reduced pain and suffering



Payers

- Eliminated unnecessary payments
- Objective and validated treatment support



**IMPROVED PATIENT
OUTCOMES**



**DECREASED COSTS
PER INPATIENT**



**IMPROVED
EXPERIENCE**



**INNOVATION
JUSTIFICATION**

REDUCING LENGTH OF STAY



Investment Summary



AI-Driven Clinical
Diagnostics

FDA Breakthrough
Designation

Strong
Competitive
Barriers



Systemwide
Benefits

Identified
Regulatory Pathway

Universal Platform for
Additional
Clinical Indications



Large & Growing
Markets

Near-Term Commercial
Opportunities

Experienced
Management
Team



Appendix



Financials



Patents



Summary balance sheets



\$ thousands	2021	2022	2023
Cash	\$ 16,121	\$ 14,174	\$ 4,790
Accounts receivable, net	1,435	2,294	2,346
Other Current Assets	911	1,219	2,766
Total Current Assets	18,467	17,687	9,902
Non-current Assets	72	1,029	790
Total Assets	\$ 18,539	\$18,716	\$ 10,692
Accounts Payable	\$ 1,414	\$ 2,759	\$ 2,683
Accrued Expenses	2,603	2,631	4,300
Other Current Liabilities	769	984	5,418
Total Current Liabilities	4,786	6,374	12,401
Non-current Liabilities	-	346	-
Total Liabilities	4,786	6,720	12,401
Stockholders' Equity	13,753	11,996	(1,709)
Total Liabilities and Stockholders' Equity	\$ 18,539	\$ 18,716	\$ 10,692



Summary income statements



\$ thousands except per share data	2021	2022	2023
Research and Development Revenue	\$ 15,239	\$ 25,368	\$ 18,056
Cost of Revenue	(8,187)	(14,531)	(10,176)
Gross Profit	7,052	10,837	7,880
Operating Expenses	11,231	13,484	20,864
Operating Income (Loss)	(4,179)	(2,647)	(12,984)
Transaction Costs	-	-	(8,342)
Other Income (Expense)	93	(159)	483
Loss Before Income Taxes	(4,086)	(2,806)	(20,843)
Income Tax (Provision) Benefit	98	(106)	(11)
Net Loss	(3,988)	(2,912)	(20,854)
Dividend on Series A Preferred Stock	(1,259)	-	-
Net Loss attributable to common stockholders	\$ (5,247)	\$ (2,912)	\$ (20,854)
Net Loss per Share	\$ (0.54)	\$ (0.22)	\$ (1.48)




Summary cash flow statements



\$ thousands	2021	2022	2023
Net Loss	\$ (3,988)	\$ (2,912)	\$ (20,854)
Stock-based Compensation	1,365	1,155	1,243
Depreciation	1	11	9
Amortization of Right-of-Use Assets	-	557	713
Issuance of Shares for Transaction Costs	-	-	4,350
Change in Fair Value of Warrant Liabilities	(298)	(57)	(335)
Changes in Assets	919	(751)	(445)
Changes in Liabilities	(917)	835	2,079
Net Cash Used in Operating Activities	(2,918)	(1,162)	(13,240)
Net Cash Used in Investing Activities	(7)	-	-
Proceeds from Issuance of Common Stock	14,618	-	3,351
Cash Received in Business Combination	-	-	660
Payments for Notes Payable	(701)	(785)	(483)
Stock Option Exercises	4	-	316
Net Cash Provided By (Used In) Financing Activities	13,921	(785)	3,844
Effect of Exchange Rate Changes on Cash	-	-	12
Net Increase (Decrease) in Cash	10,996	(1,947)	(9,384)
Beginning Cash Balance	5,125	16,121	14,174
Ending Cash Balance	\$ 16,121	\$ 14,174	\$ 4,790



Non-GAAP reconciliation



\$ thousands	2021	2022	2023
Net Loss	\$ (3,988)	\$ (2,912)	\$ (20,854)
Income Tax Provision (Benefit)	(98)	106	11
Net Interest (Income) Expense	17	(21)	(172)
EBIT	(4,069)	(2,827)	(21,015)
Depreciation Expense	1	11	9
EBITDA	(4,068)	(2,816)	(21,006)
Stock-based Compensation	1,365	1,155	1,243
Change in Fair Value of Warrant Liability	(298)	(57)	(335)
Foreign Exchange Transaction (Gain) Loss	188	237	24
Transaction Costs	-	-	8,342
Adjusted EBITDA	\$ (2,813)	\$ (1,481)	\$ (11,732)

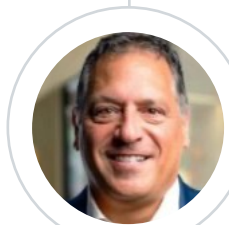


EXCEPTIONAL TEAM WITH PROVEN TRACK RECORD



Peter M. Carlson
Chief Executive Officer

30+ yrs of Finance and Operations experience in Fortune 50 and healthcare corporations, such as MiMedx, Metlife, and Wachovia.



Vincent Capone
Chief Financial Officer & General Counsel

25 yrs+ of tech company Experience KPMG, Morgan Lewis and Reed Smith LLP



Jeremiah Sparks
Chief Commercialization Officer

20 yrs+ of medical device marketing experience evidenced by positions held with Avita Medical and Allergan.



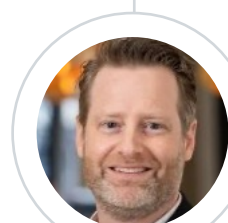
Kevin Plant
VP of Software & Data Science

10 yrs+ of software and data science leadership experience at St. Jude and Abbot.



Mary Regan, PhD
VP of Clinical Affairs

30 yrs+ years of clinical experience, with board positions held on the American Association of Wound Care Specialists and NWHS.



Jeffrey Thatcher, PhD
Chief Scientist

12 yrs+ of clinical R&D of tissue optics. Served as the PI on multiple NSF, NIH, DoD grants and BARDA contracts.



Louis Percoco
General Manager – Manufacturing

30 yrs+ of experience in R&D and Production teams in Cardiology, Orthopedic, and Spine disciplines.



Christine Marks
VP of Marketing & Commercialization

20 yrs+ of marketing experience for wound care medical device companies, such as BSN Medical and Lohmann & Raucher.



Prof. Paul Chadwick
EVP of UK and EMEA

Podiatrist with 15 yrs+ of experience in wound care and foot health. Most recently former CEO of Royal College of Podiatry in UK.



Board of Directors



**Richard
Cotton**

Financial Advisor to Novumgen Ltd., and held CFO positions at several medical companies.



**Erich
Spangenberg**

Managing partner at Sauvegarder Investment Management with extensive background in investment banking.



**Martin
Mellish**

Founding director of Aspen Advisory Services Ltd.



**Cynthia
Cai**

Founder and president of Tharton Consulting, and venture partner of Viva BioInnovator.



**Deepak
Sadagopan**

Serves as COO of Population Health at Providence, and CEO of Health Connect Partners, LLC.



**Peter M.
Carlson**

Prior to becoming CEO of Spectral AI, served as CFO since January 2024. Prior to Spectral AI, was CFO of MiMedx Group, Inc.



**J. Michael
DiMaio, MD**

24+ years of experience in cardiothoracic surgery, and Chief of Staff at Baylor Scott & White supervising more than 650 physicians.



Strategic Advisory Board



Toby Cosgrove, MD

- Former president and Chief Executive Officer of Cleveland Clinic and currently serves as an Executive Advisor for Cleveland Clinic
- Former president of the American Association of Thoracic Surgery



John Botts

- Senior Advisor, Allen and Company, previously 22-year Citi international career, including running its London investment banking division/starting CVC
- Director of Cleveland Clinic London Foundation



Expert clinical guidance



This technology has promise to be the leap forward we have needed to bring about systematic change in burn care from the frontline all the way to the experts.



DeepView will significantly transform how we treat DFUs through continuous monitoring and measurement ensuring an accelerated healing trajectory and **prevent DFU reoccurrence.**



JEFF CARTER, MD

Chief Medical Consultant

Dr. Carter has been practicing burn/trauma medicine for over 12 years and currently serves as the Medical Director for the University Medical Center Burn Center in New Orleans, LA, and on faculty at Louisiana State University Health Sciences Center.



PROF. PAUL CHADWICK

EVP of UK and EMEA

Former CEO of the Royal College of Podiatry UK

Prof. Chadwick is a world-renowned clinical research scientist, wound care key opinion leader (KOL), and has an extensive publication record on diabetic wound management.

Intellectual property

formidable barrier to entry

Active patent application families protecting our current and anticipated future business

- Burn/Wound classification on MSI and PPG
- Tissue classification on MSI and PPG
- Amputation site analysis on MSI, machine learning and healthcare matrix
- DFU healing potential prediction and wound assessment on MSI, machine learning and healthcare matrix
- High-precision, multi-aperture, MSI snapshot imaging
- Wound assessment on MSI, optical, biomarkers, and machine learning
- Burn/Histology assessment on MSI and machine learning
- High-precision single aperture snapshot imaging with multiplexed illumination
- Topological characterization and assessment of tissue including wounds, using MSI and machine learning



20

**U.S. & International
Patents issued and
allowed**



34

**Pending U.S. &
International patent
applications**

ACTIVE MANAGEMENT OF IP PORTFOLIO

- Useful life on key patent protection on core concepts exceeds 14 years
- Proprietary physician review image library for Burn and DFU
- Engage leading experts to constantly evaluate IP strategy and execution



REFERENCE LIST

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16. Huson HB, Phelan HA, G'Sell DJ, Smith S, Carter JE. If Seeing Was Believing A Retrospective Analysis of Potential Reduced Treatment Delays with a Novel Burn Wound Assessment Device. JBCR 2021;(42)S117-18.
17. TAM and CAGR – Global Burn Care Market Size & Share Report, 2021-2028
18. TAM and CAGR – Fortune Business Insights: Diabetic Foot Ulcer Treatment Market Worth \$11.16 Billion at 6.8% CAGR; Rise in Clinical Trials to Augment Market

FORWARD LOOKING STATEMENTS



Except for the historical information contained herein, this document contains forward looking statements within the meaning of the Private Securities Litigation Reform Act of 1995, including statements regarding (i) our strategy, plans, objectives and initiatives, including but not limited to our plans and projected timelines to begin commercialization and product sales, launch new products, complete clinical trials, add additional clinical indications, (ii) the ability to be listed on the Nasdaq Global Market, (iii) Spectral AI's managements' expectations, (iv) potential government contracts, (v) expected beneficial outcomes and synergies, (vi) potential financing opportunities, (vii) Spectral AI's regulatory pathway for and timing of FDA, CE and UKCA regulatory submissions and approvals, (viii) Spectral AI's U.S. government contracts and future awards, (ix) the total anticipated target markets for burn wound and diabetic foot ulcers, (x) possible competitors, (xi) potential future indications and applications for DeepView and areas of interest supported by BARDA, (xii) Spectral AI's future and pending U.S. patent applications and foreign and international patent applications, and (xiii) pro forma information and other estimated values. The foregoing list of risk factors is not exhaustive. Management believes that these forward-looking statements are reasonable as and when made. However, such forward-looking statements involve known and unknown risks, uncertainties, and other factors that may cause actual results to differ materially from those projected in the forward-looking statements. These risks and uncertainties include but are not limited to our ability to obtain and maintain necessary regulatory approvals, general economic conditions, consumer demand for our products and services, challenges relating to entering into and growing new business lines, the competitive environment, and the risk factors listed from time to time in our Annual Reports on Form 10-K, Quarterly Reports on Form 10-Q, the Registration Statement on Form S-1, as amended, filed with the SEC on January 5, 2024 and any other SEC filings including the sections entitled "Cautionary Note Regarding Forward-Looking Statements", "Cautionary Note Regarding Forward-Looking Statements and Risk Factor Summary", "Risk Factors", "Management's Discussions and Analysis of Financial Condition and Results of Operations" and "Business" and in the Financial Statements. The Company undertakes no obligation to update forward-looking statements except as required by applicable securities laws. Readers are cautioned that forward-looking statements are not guarantees of future performance and are cautioned not to place undue reliance on any forward-looking statements.

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