



Presentation 3-month Financial Report

14 April 2010

Forward looking statements

This communication contains certain forward-looking statements, relating to the Company's business, which can be identified by the use of forward-looking terminology such as "estimates", "believes", "expects", "may", "will" "should" "future", "potential" or similar expressions or by general discussion of strategy, plans or intentions of the Company. Such forward-looking statements involve known and unknown risks, uncertainties and other factors, which may cause our actual results of operations, financial condition, performance, or achievements, or industry results, to be materially different from any future results, performance or achievements expressed or implied by such forward-looking statements.

Such factors include, among others, the following: uncertainties related to results of our clinical trials, the uncertainty of regulatory approval and commercial uncertainty, reimbursement and drug price uncertainty, the absence of sales and marketing experience and limited manufacturing capabilities, attraction and retention of technologically skilled employees, dependence on licenses, patents and proprietary technology, dependence upon collaborators, future capital needs and the uncertainty of additional funding, risks of product liability and limitations of insurance, limitations of supplies, competition from other biopharmaceutical, chemical and pharmaceutical companies, environmental, health and safety matters, availability of licensing arrangements, currency fluctuations, adverse changes in governmental rules and fiscal policies, civil unrest, acts of God, acts of war, and other factors referenced in this communication.

Given these uncertainties, prospective investors and partners are cautioned not to place undue reliance on such forward-looking statements. We disclaim any obligation to update any such forward-looking statements to reflect future events or developments.

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- Oncology-focused biopharmaceutical company
- Transition from R&D to commercially driven business
- Product candidates close to market
 - First-in-class
 - Strong competitive profile

Development success

Phase I II III

REDECTANE®

RENCAREX®

MESUPRON®

WX-554

Significant peak sales potential

- REDECTANE® (diagnostic MAb*): ~ \$100m
 - RENCAREX® (therapeutic MAb*): ~ \$500m
 - MESUPRON® (small molecule): ~ \$1bn
- * Monoclonal antibody

Commercial deals



ESTEVE
closer to you



- Multiple value inflexion points in the next months

Corporate

- Cash capital increase generates € 8.53 m
- Milestone payment of € 5.00 m from UCB received
- Standby equity distribution agreement for up to € 20.00 m signed

R & D

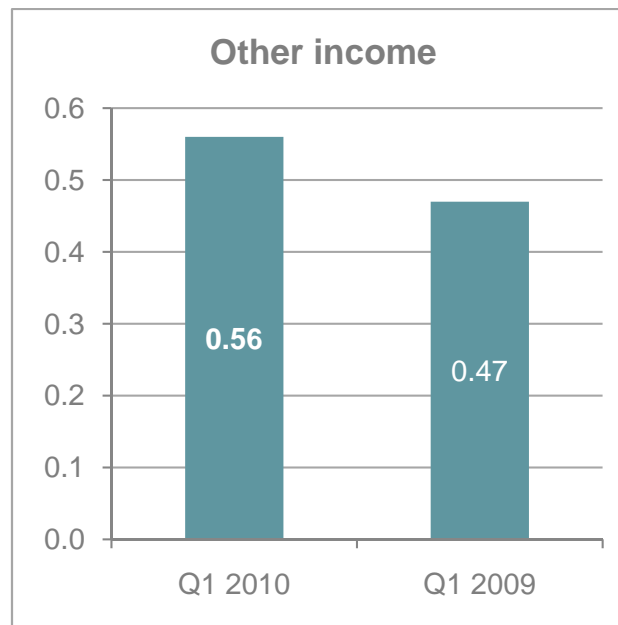
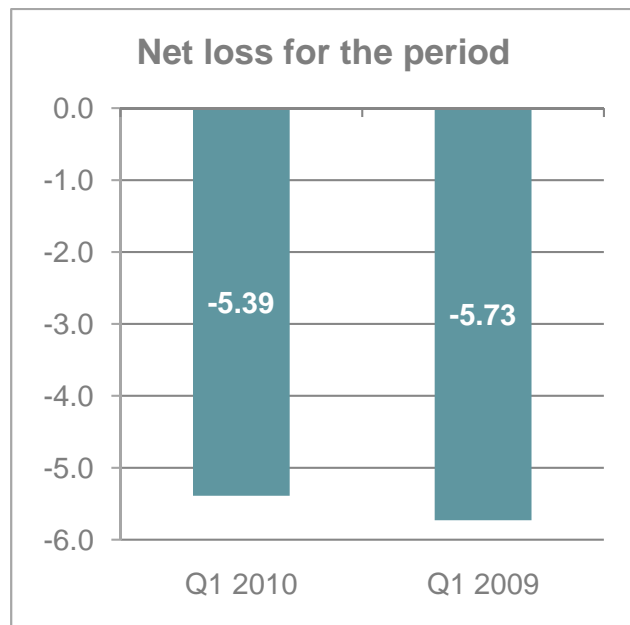
- REDECTANE[®]: Phase III trial - data analysis
- RENCAREX[®]: Phase III trial - 317 events
- MESUPRON[®]: Phase II trial in pancreatic cancer - data analysis
- MESUPRON[®]: Phase II trial in breast cancer - 75 patients recruited
- WX-554: Phase I trial in healthy volunteers - ongoing



Financials

Key figures Q1 2010

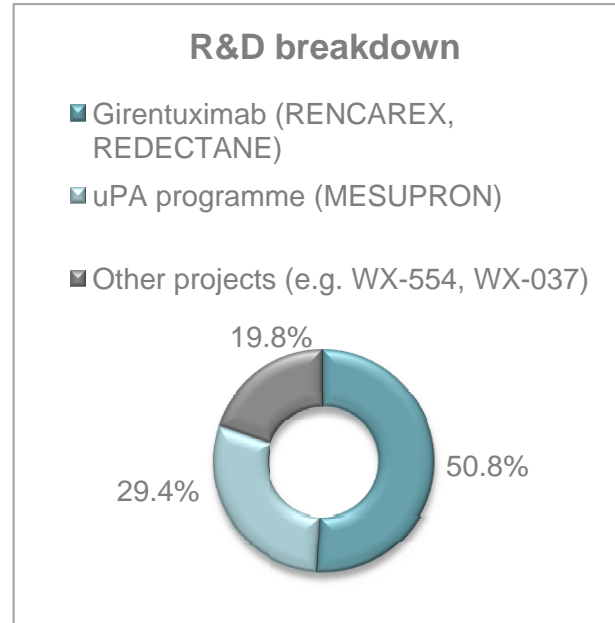
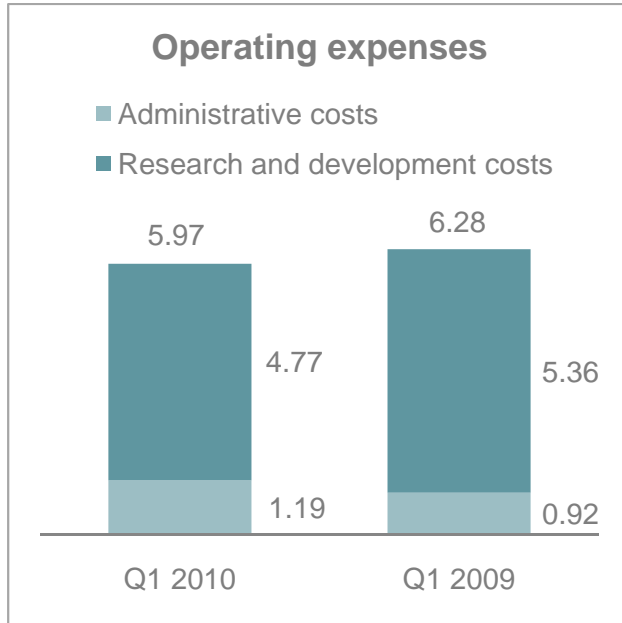
*€m; rounded



- Net loss for the period € 5.39 m, 5.7% lower compared to Q1 2009
- Other income at €0.56 m up 19.9%
- Earnings per share: € -0.34 (Q1 2009: € -0.48)
- Number of employees: 70

Operating expenses Q1 2010

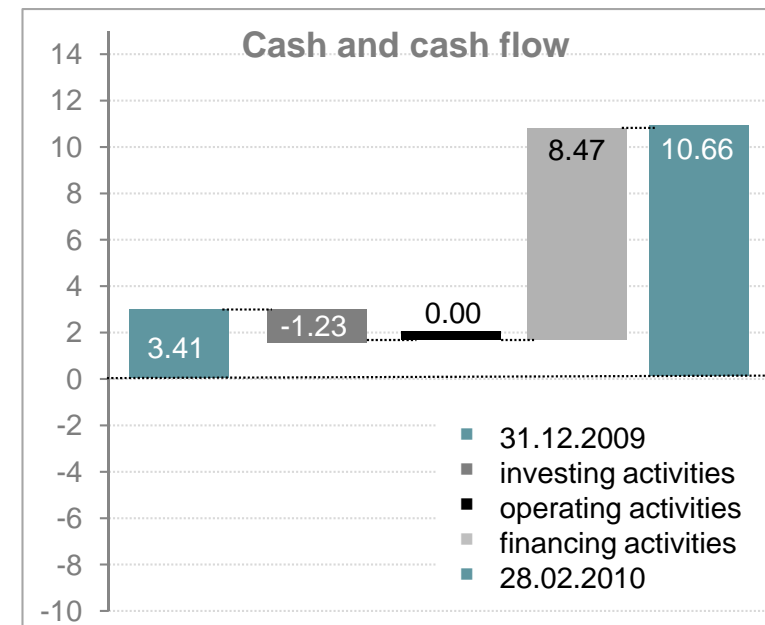
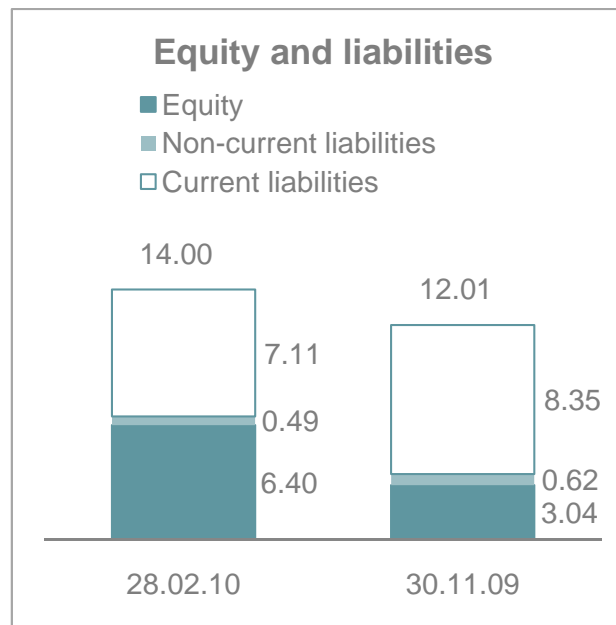
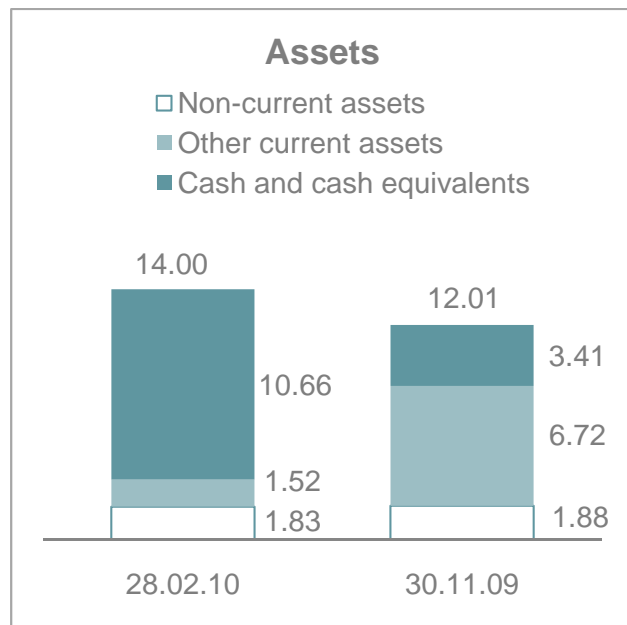
*€ m; rounded



- Other expenses down 5.0% from the previous year
- R&D expenses are 80% of total costs
- Administrative costs higher due to increased expenses from the measurement of stock options

Balance sheet as at 28 February 2010

*€m; rounded



- Equity ratio 45.7 %
- Cash balance as at 28.02.10 €10.7 m
- Average cash usage per month € 2.07 m (Q1 2009: € 1.89 m) without milestone payment and cash capital increase
- Cash reach into the third quarter
- SEDA to prolong cash reach

Corporate

- ✓ SEDA signed; Equity line funding of €20 m over 36 months possible

REDECTANE®

- Final Phase III data and report (Q2 2010)
- Filing with FDA (Q4 2010)

RENCAREX®

- Announcement of 343 relapses in ARISER trial (2010)
- Interim analysis for efficacy 6 months later; could be basis for filing with EMEA

MESUPRON®

- Final Phase II data in pancreatic cancer (Q2 2010)
- Worldwide commercialisation deal in 2010

WX-554

- Complete Phase I healthy volunteer study (Q2 2010)

- Oncology-focused company
- Transition from R&D to commercially driven business
- Product candidates close to market
 - First-in-Class
 - Strong competitive profile
- Strong increase in revenues
- Commercial deal opportunities in attractive indications
- Multiple value short-term inflexion points ahead

WILEX AG

Grillparzerstr. 10
81675 Munich, Germany
Tel.: +49 (0)89-41 31 38-0
Fax: +49 (0)89-41 31 38-99
Website: www.wilex.com

Corporate Communications

Katja Arnold (CIRO)
Email: investors@wilex.com
Tel.: +49 (0)89-41 31 38-126

ISIN: DE0006614720
Symbol: WL6
Reuters: WL6G.DE
Bloomberg: WL6G.GR