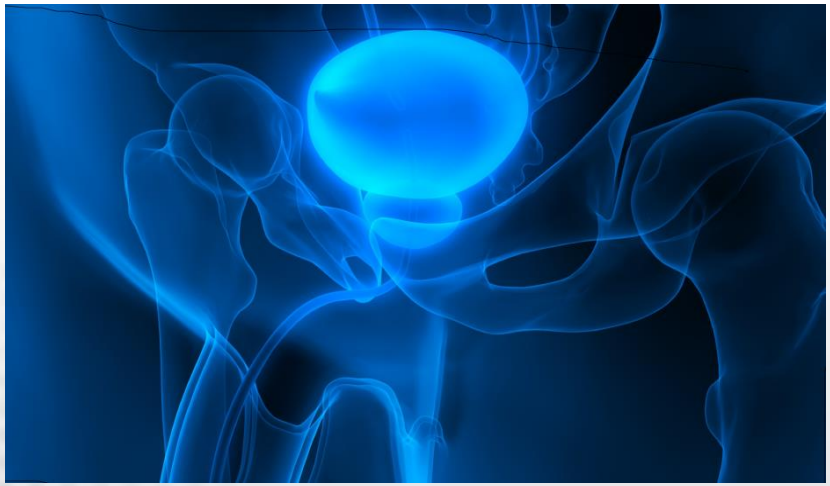
IMAGIN MEDICAL



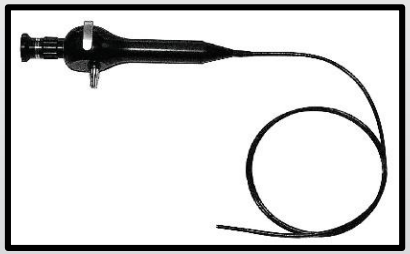
Investor Presentation

Second Quarter, 2018

Company Overview

Imagin Medical ... a medical imaging company with advanced optic and light sensor technology that will dramatically improve physicians' ability to visualize the surgical field and detect cancer where endoscopes are used.

- Initially targeting bladder cancer
- Will adapt to all minimally invasive surgical (MIS) procedures where endoscopes are used



Flexible Endoscope

Rigid Endoscope

Imagin Medical Today

Disrupting Imaging Technology

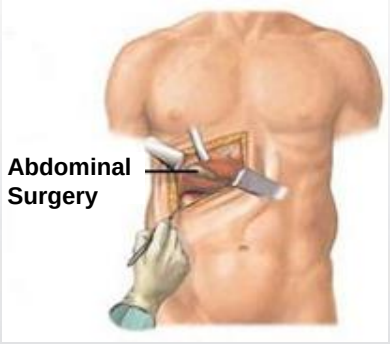
- Bladder cancer is “hot-button” urology issue looking for innovation – new AUA guidelines
- R&D risk mitigated – prototype completed
  - U Rochester IRB approved
  - 1st in-human Research Study – 1Q/2Q
- World-class Scientific Advisory Board – Drs. deVere White, Messing, Buckley

- High-margin products with strong clinical and economic advantages
- Managed as a virtual company with an experienced management team that has done it before
- Strong acquisition market. Most medical device companies grow by acquisition. Company expects to have significant value and multiple liquidity options.

This is an Execution Play

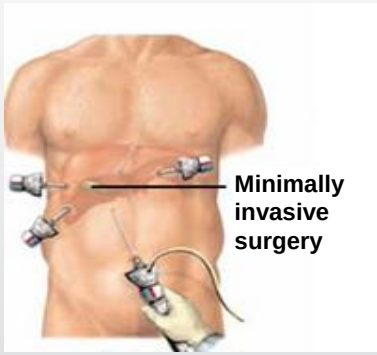
Definitions - Endoscopic Market

Open Surgery



- Muscles cut
- Open/large incisions
- More pain, scarring, longer recovery, longer hospital stay, great cost

Minimally Invasive Surgery

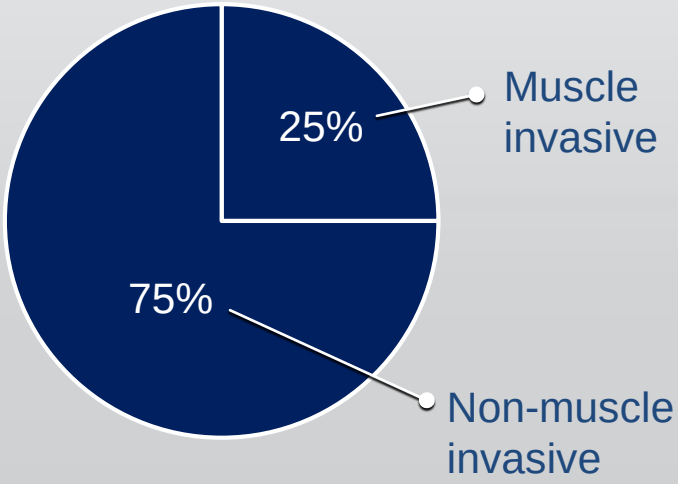


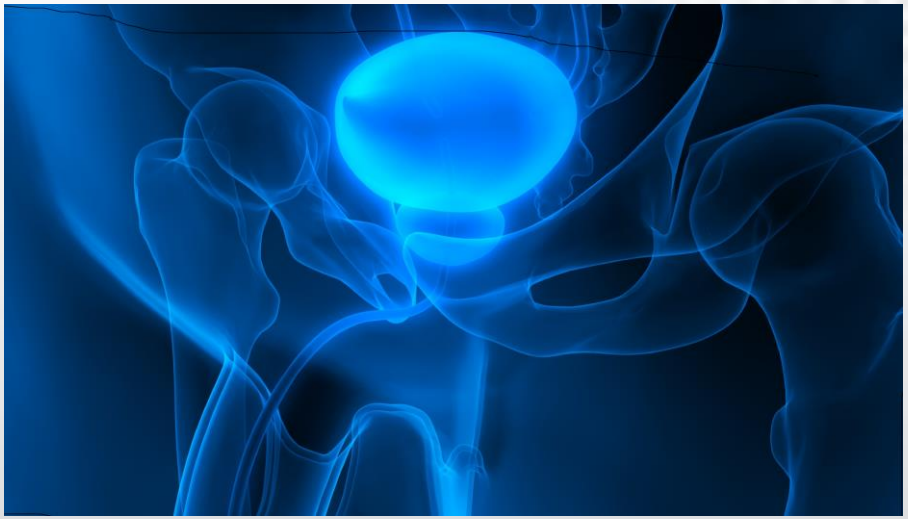
- **Less muscle cut**
- Performed using tiny holes or incisions
- Reduced pain, smaller/no scarring, quicker recovery, shorter hospital stay, less expensive

- **Endoscope** – a medical device with attached light “to look inside”

  Different medical specialties use different types of *endoscopes:*
  Cystoscopes, Laparoscopes, Gastroscopes, Bronchoscopes

Bladder Cancer





- Most expensive cancer to treat
- $4B bladder cancer surveillance
- > 50% recurrence rate in non-muscle
- > 600,000 living in fear of recurrence
- 81,190 new cases/year; 17,240 deaths*

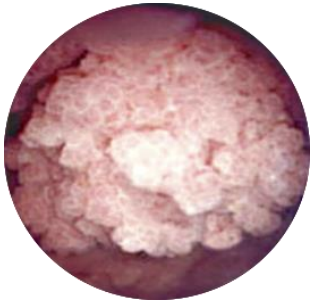
Medical illustration: "Blausen 0082 BladderCancer" by Blausen Medical Communications, Inc. - Donated via OTRS, see ticket for details. Licensed under CC BY 3.0 via Wikimedia Commons

* American Cancer Society: Key Statistics for Bladder Cancer; Last Revised: January 4, 2018

Standard of Care –
Endoscopes with White Light

Current endoscopes use white light (visible light) that has been the gold standard for decades > 90% of the market.

- Highly effective for detecting cancerous tumors that protrude above the bladder wall



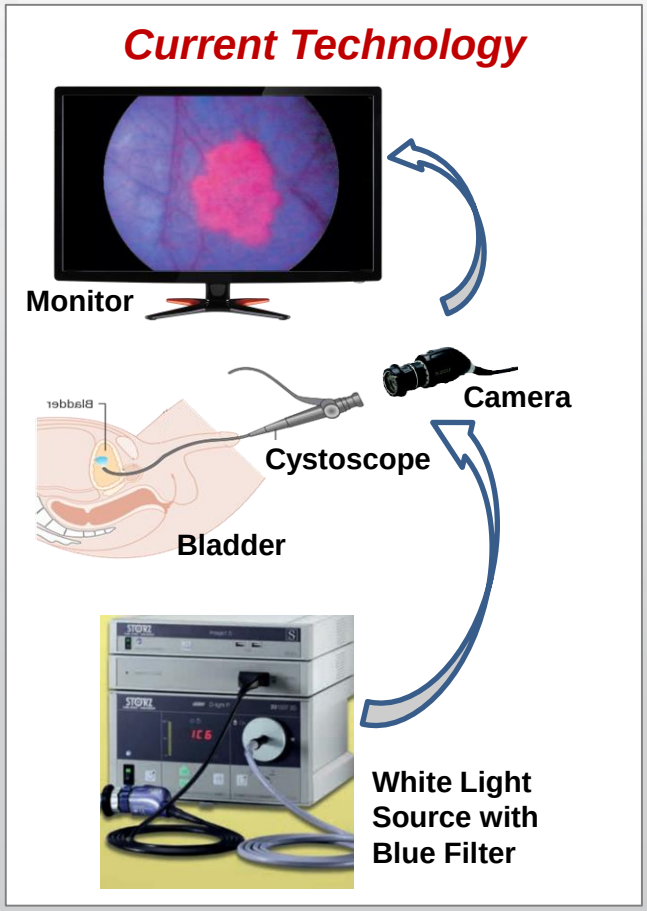
Tumor visible above organ wall

- Limitations of white light:
  - Flat tumors may look the same as normal tissue
  - Not effective in visualizing the margins (edges) of the tumor

Flat tumors not visible

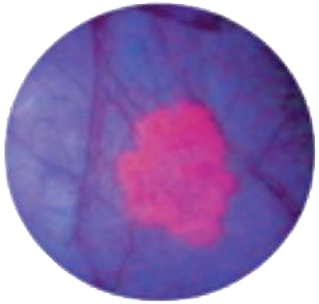
Standard of Care –
Endoscopes with Blue Light and Fluorescence

Contrast agents are used with white light and a blue filter, inducing fluorescence.



- Benefit: Improves ability to detect flat cancers and visualize margins
- Barriers of Adoption:
  - Needs one hour for contrast agent to be visible in bladder
  - Dr. must manually "switch" between two different images

Blue Light & Fluorescence*



*Blue light magnifies highlighted image of cancer but doesn't show its location**

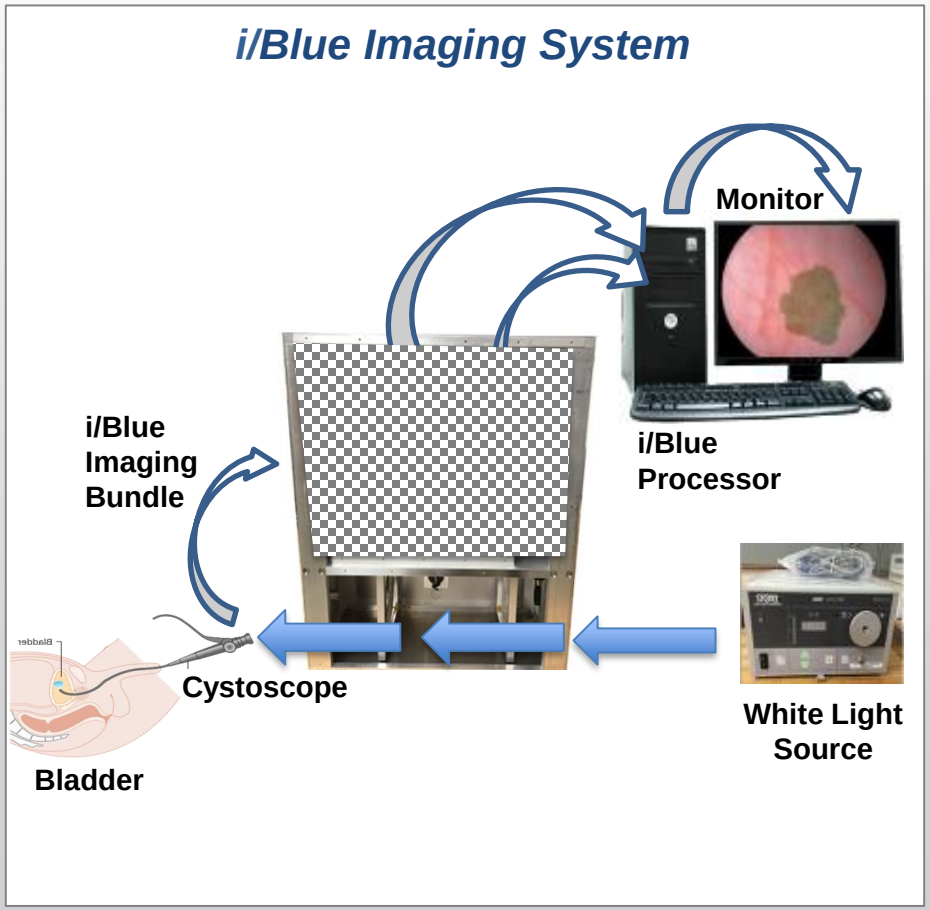
versus

White Light

White light image shows full landscape of the bladder but doesn't highlight cancer

* Image by Photocure, using Cysview. 3Cysview® is a trademark of Photocure ASA, and is a trade name for hexaminolevulinate hydrochloride (HAL-BLC)

Imagin's Solution –
Endoscopes with **i/Blue** Imaging System*



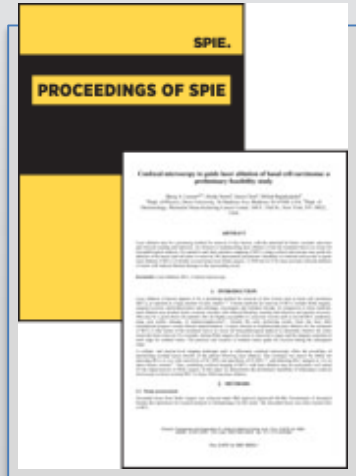
- "Sees" the cancer in less than 15 min. vs. 1 hour
  - Optics 100 times more sensitive
- Simultaneous acquisition of differing images
  - No switching back and forth
  - Blends white light and fluorescence images into one
  - Shows cancer in context
  - Enables surgeon to better visualize and resect the cancer
- Makes i/Blue technology practical, not only for the O.R. but also potentially for the physicians' office
- Adapts seamlessly to most types of endoscopes on the market

*Imagin Medical, Inc. is a development stage company and does not currently have any Medical Device Regulatory Approvals or Clearances to market products in any jurisdiction.

Disruptive Technology

On-going Development: i/Vision™ Imaging System*

- Combines multiple illumination sources into one system
- Accommodates the most commonly used fluorescing contrast agents, such and Indocyanine green (ICG)
- Enables expansion into multiple endoscopic procedures related to cancer and non-cancerous conditions
- Initial prototype built, animal bile duct evaluation – data presented



PROCEEDINGS PAPER:
Enhanced visualization of the bile duct via parallel white light and indocyanine green fluorescence laparoscopic imaging
Stavros G. Demos **;**
Shiro Urayama
[+] Author Affiliations
Proc. SPIE 8940, Optical Biopsy XII, 89400R (March 17, 2014); doi:10.1117/12.2044271

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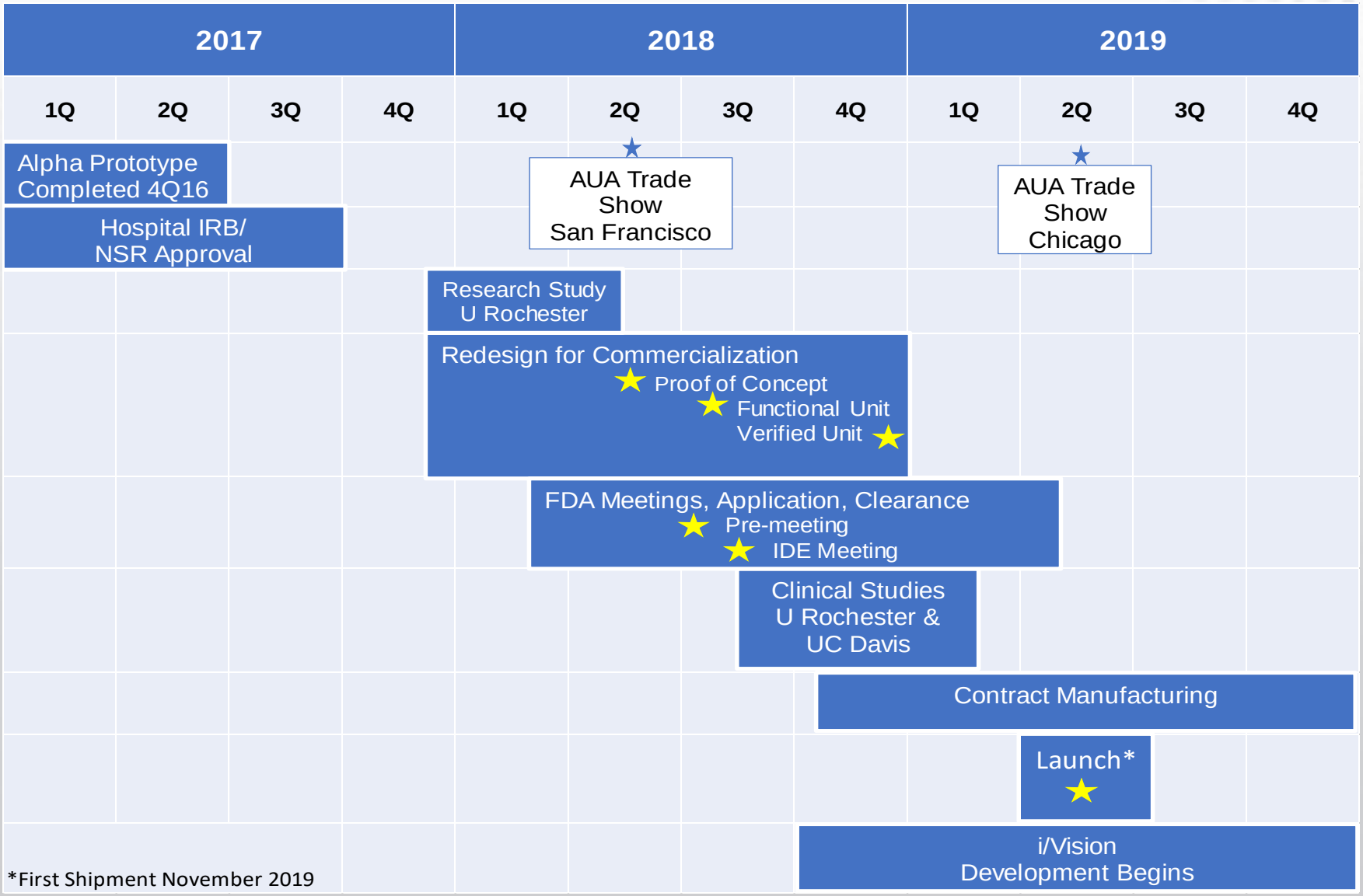
Milestones: Product Development

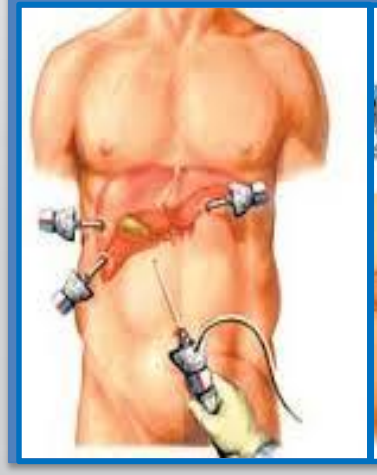
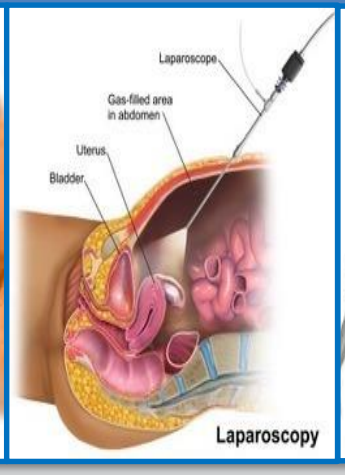
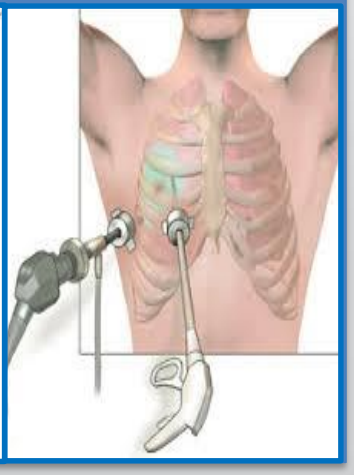


Regulatory Overview

- FDA Premarket submission
  - PMA Pathway likely
  - Clinical study planned to compare Imagin's system performance to other imaging devices currently on the market
  - Presumes that device will be used with FDA-approved imaging agents and routes of administration
  - Expect 12 month process but could be longer depending on chosen claims, (*e.g.,* non-inferiority vs. superiority)
- Full GMP Compliant Quality Management System (QMS) required
- Hogan Lovells US, LLP, Washington DC, will manage all government regulatory approvals

Marketing and Sales Plan

- Create immediate credibility in the market:
  - Develop physician champions/establish 4 *Centers of Excellence*
- Drive to profitability using 7–10 independent sales reps
- Expand market to additional procedures:

General	Colorectal	Gynecology	Thoracic
			

Competition

- **Current endoscopes -** today's Standard of Care
- **Karl Storz** – privately held German company, major worldwide endoscopy company. Their product, the PDD Blue Light System, costs $37,000 and was approved in tandem with **Photocure's** imaging agent**,** Cysview®. Photocure is a Norwegian company, publicly listed. This system improves the surgeon's ability to detect bladder cancer but is thought to be impractical due to the one-hour bladder absorption time.
- **Olympus Corporation** – largest seller of endoscopes in the world, recently introduced an endoscope with *Narrow Band Imaging*. This system better highlights the micro vessels near tumors as well as areas of inflammation. The product costs $54,000 and is not achieving significant success in the marketplace.

Management Team

The Imagin Team *(from left):*

- **Mike Vergano**, *Director of Operations*
- **Jim Hutchens**, *President & CEO*
- **Dr. Stavros Demos**, *Inventor & Project Director*
- **Steve Ruggles**, *Director of Quality Assurance and Regulatory Affairs*

Imagin: A Public Company

Security Exchanges:

- Listed:
  Canadian Securities Exchange (CSE) IME
- Trades:
  Over the Counter (OTC Pink) IMEXF

Capital Structure

Issued and outstanding	126,034,738	
Options	**# of Options**	**Exercise Price**
Fully vested & exercisable	225,000	$0.24
Fully vested & exercisable	1,200,000	$0.15
Fully vested & exercisable	1,150,000	$0.15
Fully vested & exercisable	300,000	$0.15
Fully vested & exercisable	1,350,000	$0.18
Fully vested & exercisable	100,000	$0.19
Fully vested & exercisable	700,000	$0.25
Fully vested & exercisable	2,100,000	$0.40
Fully vested & exercisable	2,750,000	$0.31
Total options	**9,875,000**	
Warrants Type of Warrant	**# of Warrants**	**Exercise Price**
Finders	396,800	$0.10
Private Placement	7,269,300	$0.10
Finders	8,000	$0.10
Private Placement	5,591,200	$0.10
Finders	82,500	$0.16
Private Placement	562,500	$0.16
Private Placement	400,000	$0.25
Finders	98,960	$0.16
Private Placement	1,942,355	$0.16
Ex-Convertible Debt	240,365	$0.12
Acquisition	1,100,000	$0.15
Ex-Convertible Debt	146,667	$0.12
Private Placement	11,722,783	$0.38
Finders	745,546	$0.38
Private Placement	6,197,037	$0.38
Finders	371,564	$0.38
Total warrants	**36,875,577**	
Fully diluted	**172,785,315**	

Why Invest in Imagin Medical

Key Investment Risks Removed, High Investment Return

- **Disruptive imaging technology** will dramatically reduce bladder cancer recurrence rates, addressing $750M+ global market.
- **Limited R&D risk** as concept is already proven. Research study in process at UR Medical Center. This is an execution play.
- **Experienced medical device management team** that has done it before.
- **Strong acquisition market**. Most medical device companies grow by acquisition, not organically. Company expects to have significant value and multiple liquidity options.