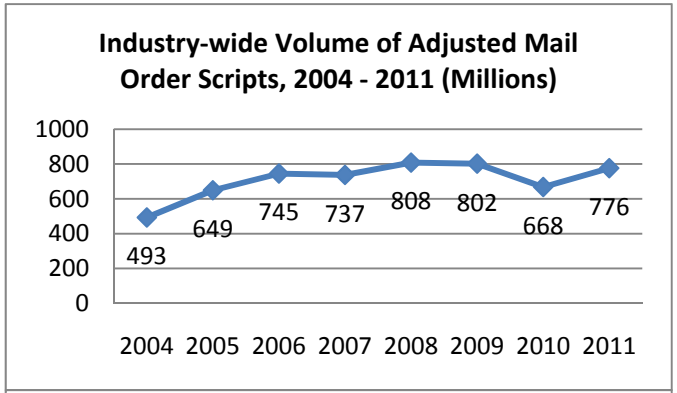
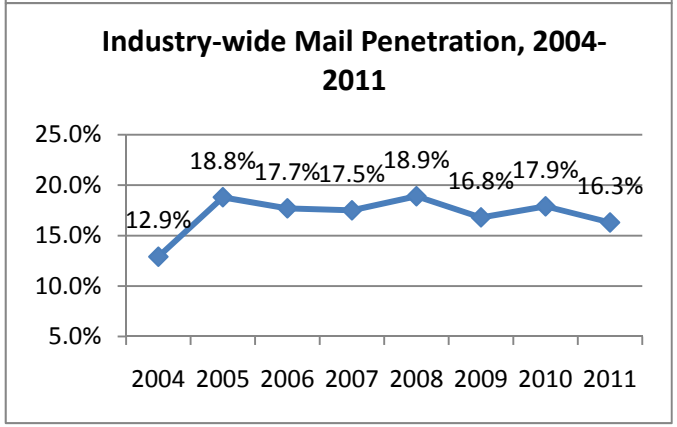
Mail Order Utilization Up from Year-Ago Low Point

Total adjusted annual mail order volume as of first quarter 2011 was 776 million, a 16% increase over the prior year figure of 668 million. However, the increase in mail volume lags behind a 20% increase in total Rx volume. Data from AIS's quarterly survey of PBMs indicate that mail order growth began declining in 2009 and reached its lowest point since 2005 in 2010 (DBN 4/30/10, p. 5). Mail order penetration – the percentage of total scripts filled via mail – remained fairly stable throughout the recession. It is currently 21.98% for companies with mail capability, and 16.32% industry-wide (including companies that don't offer mail).

Selected PBMs by Mail-Order Volume, With Penetration and Market Share, As of Q12011

Company	Rx Via Mail Order	Rx Via Mail Order (Adjusted)*	Mail Penetration	Mail-Order Market Share
Medco Health Solutions, Inc	109,800,000	309,000,000	32.90%	38.83%
CVS/Caremark	64,200,000	192,600,000	27.01%	24.17%
Express Scripts, Inc.	54,100,000	162,300,000	21.24%	20.37%
Aetna Pharmacy Management	8,294,537	24,883,611	18.97%	3.12%
CIGNA Pharmacy Management	5,400,000	16,200,000	26.17%	2.03%
Catalyst Rx	3,097,158	9,291,474	11.21%	1.17%
Prime Therapeutics LLC	2,609,440	7,828,320	8.58%	0.98%
Health Trans	1,950,000	5,850,000	5.23%	0.73%
National Pharmaceutical Services	1,095,000	3,285,000	25.68%	0.41%
SXC Health Solutions, Inc./Informed Rx	911,721	2,735,163	10.20%	0.34%

SOURCE/METHODOLOGY: AIS's quarterly survey of PBMs and related companies, conducted for DNB.
*Mail-order prescriptions are multiplied by three to adjust for the fact that they are typically filled in a three-month quantity vs. a one-month quantity for retail scripts. Adjusted mail order figures were used for calculating penetration and market share in this analysis. Prescription volume figures represent the latest available 12-month count at the time of the survey. Market share refers to the percentage of total mail order scripts reported on this survey.