



Digital Health Industry Update
Göttingen Corporate Finance
November 09, 2020

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Göttingen Corporate Finance

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We prioritize your interests and objectives:
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We are collaborative and partnership oriented

We have a direct line to key decision makers within the most relevant capital providers

We provide seamless advice and execution

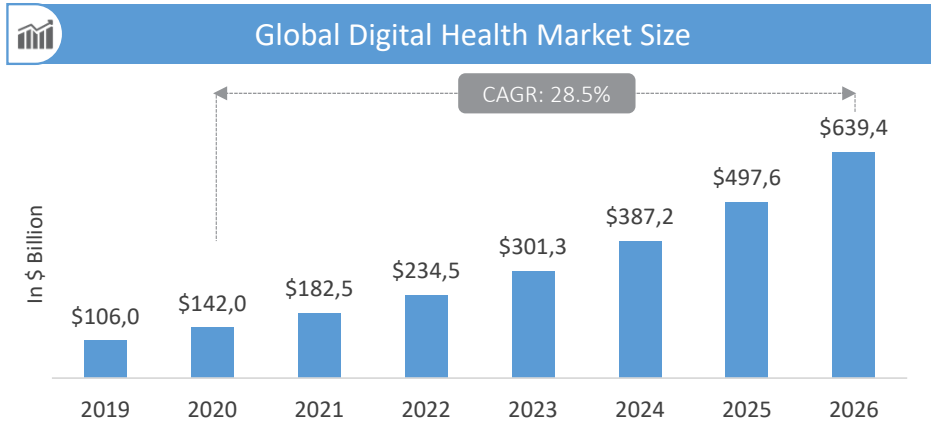
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GCF wants to be the partner that helps companies realise its true potential by finding the ideal investor which would be aligned in its strategic vision with your company

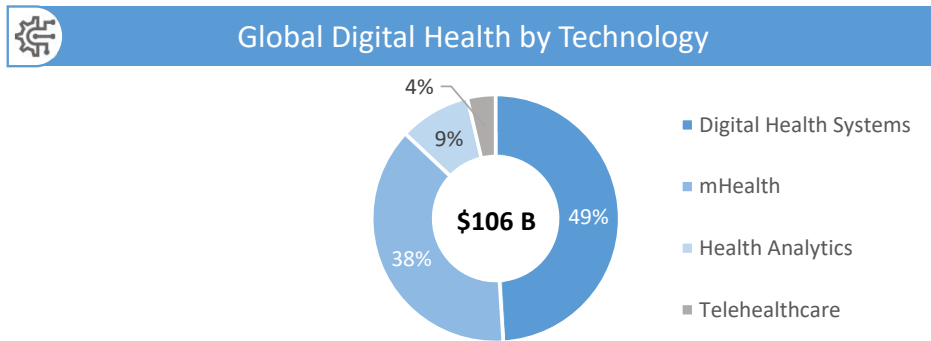
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Global Industry Overview

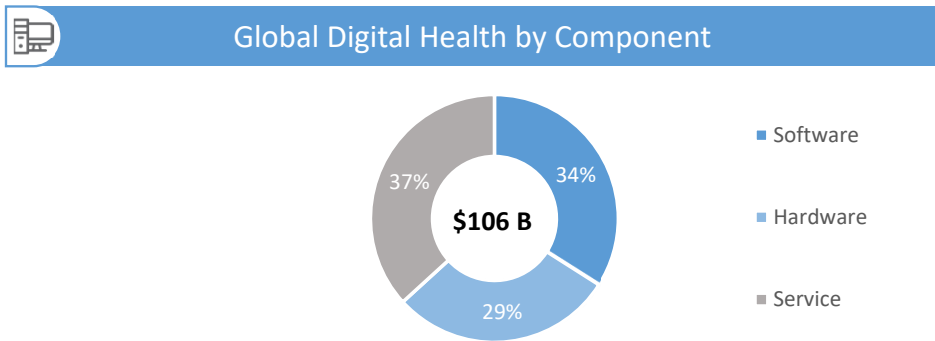


- ▶ Globally, remote healthcare systems are being increasingly sought for patient monitoring and consulting, to manage the rising incidence of chronic diseases. The COVID-19 pandemic may have reinforced the business case for digital mode in healthcare service delivery.
- ▶ The growth prospects, however, are being shaped by multiple and varied factors. Emerging and relatively under-developed economies leverage digital modes to meet gaps in access, whereas the mature and developed economies are driven by relative costs considering universal health coverage policies.
- ▶ North American region holds the predominant share of this market (43% in 2019) and is projected to register the highest growth among other regions. Enhanced public funding as well as changing demography are among key factors.



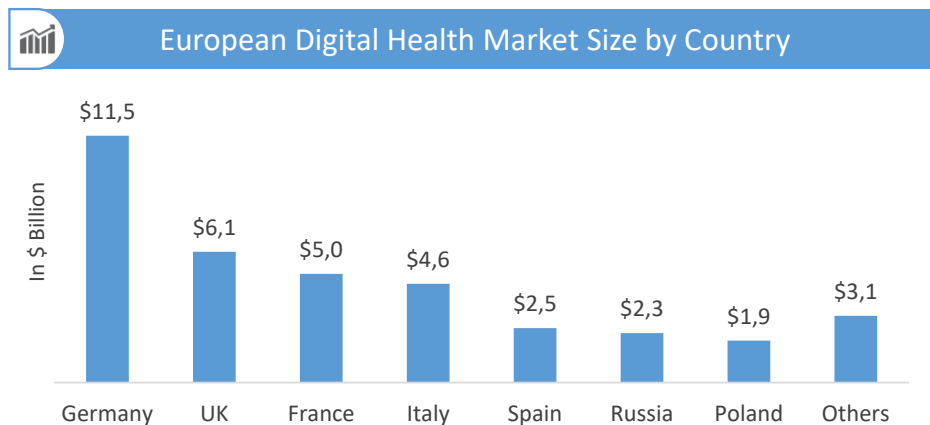
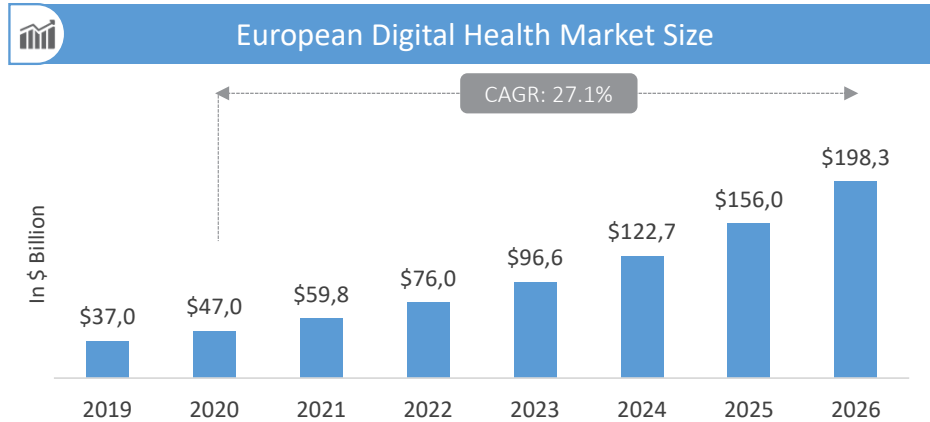
The digital health systems market is expected to register 18% CAGR over the forecast period. The shift to digital/paperless patient records, through systems such as EHRs and e-prescription software, is among the major manifestations of this segment.

Source: Global Market Insights, Market Data Forecast



There is an exponential rise in the role of telehealth/telemedicine in major markets such as the US. Weekly telehealth-based virtual visits, for instance, rose from 13,000 to 1.7 million for US Medicare between March 2020 and June 2020

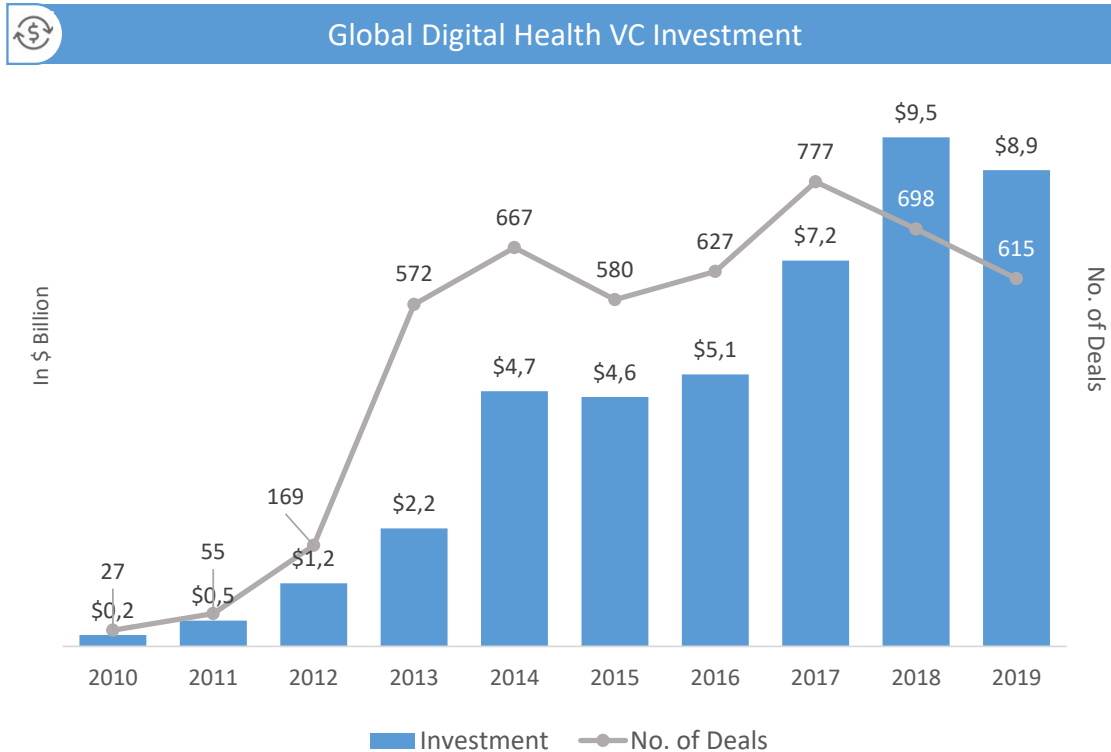
European Industry Overview



Source: Global Market Insights, Market Data Forecast, Algosonline

- ▶ European region's market for digital health system is underpinned by its demographic characteristic of rising longevity and a systemic shortage of healthcare professionals and/or infrastructure to cater to such requirements.
- ▶ In the face of the underlying demand, growth of European digital health market is driven by penetration of smartphones and similar platforms. This, together with the enabling infrastructure and policy and demand has attracted investments.
- ▶ In 2017, European Commission presented the results of its public consultation project seeking stakeholders' perspective to promote the digital health market.
 - ▶ Majority of respondents flagged data security and privacy as concerns
 - ▶ Cybersecurity risks and robust infrastructure were highlighted as key barriers in the market
- ▶ As per the annual European eHealth survey, telehealth service is among the most important in European digital health, coming second after the patient health records.
- ▶ Germany is the second-largest healthcare market globally with an estimated market size of \$11.5 billion, followed by the UK. In November 2019, the German Parliament approved the draft legislation Digital Healthcare Act. Among other things, this law entitles those covered by statutory coverage to avail of digital health applications.
- ▶ The UK healthcare sector has recently developed advanced systems by introducing robotics in the digital healthcare domain, and this artificial medical intelligence culture is expected to help the UK to grow at a CAGR of 29.6% during the forecast period.

Investment Trend Analysis (1/3)



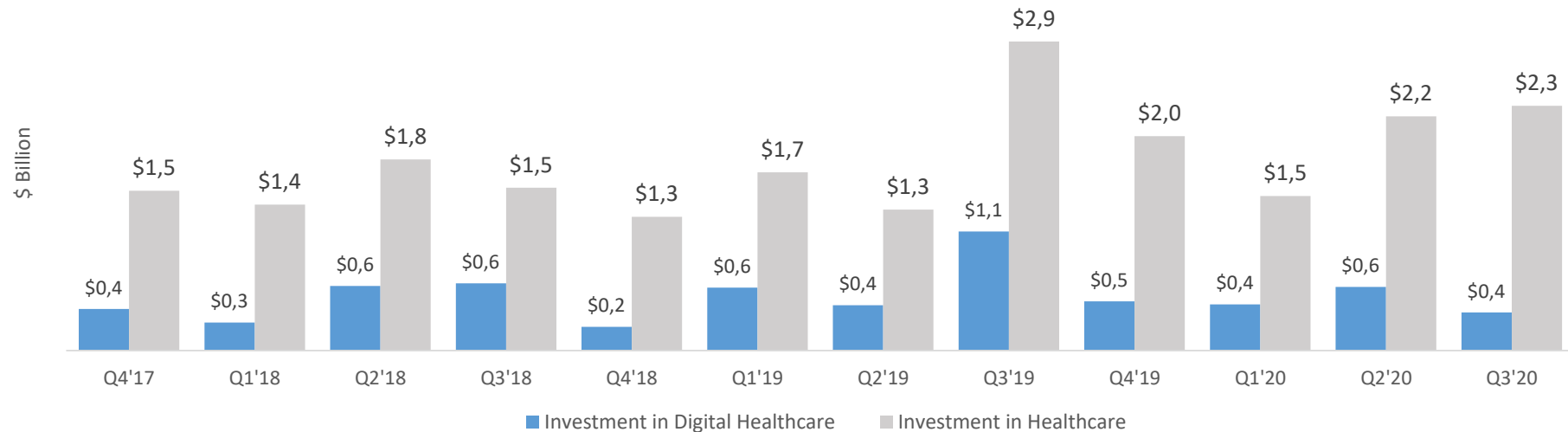
Source: Mercom Capital, CB Insights

- ▶ The global venture capital (VC) investment in digital health was \$211 million in 2010 which reached \$8.9 billion in 2019, growing at a CAGR of 51%.
- ▶ Top funded categories in 2019 included Telemedicine with \$1.8 billion, Data Analytics with \$1.6 billion, mHealth Apps with \$1.2 billion, Clinical Decision Support with \$748 million, Mobile Wireless with \$556 million, and Booking with \$537 million.
- ▶ Global VC funding, including private equity and corporate VC in digital health companies, reached a record \$3.6 billion in 142 deals in Q1 2020, against \$1.7 billion in 142 deals, in Q4 2019.
- ▶ Over two-thirds of the digital health funding went to US companies in 2019. But this experienced a 16% decline YoY, with \$5.9 billion in 2019 across 426 deals compared to \$7.0 billion across 420 deals in 2018. The UK came next with \$853 million, followed by China (\$663 million) and France with (\$372 million).
- ▶ Digital Health companies have brought in over \$47 billion in VC funding in 4,905 deals since 2010.
- ▶ 2018 and 2019 witnessed a rapid shift in investments towards well-being and care delivery innovators, while innovators actively leveraged AI, machine learning (ML), and the Internet of Things (IoT) to enable their products and solutions.

Investment Trend Analysis (2/3)



European Digital Health Vs European Healthcare Investment Trend



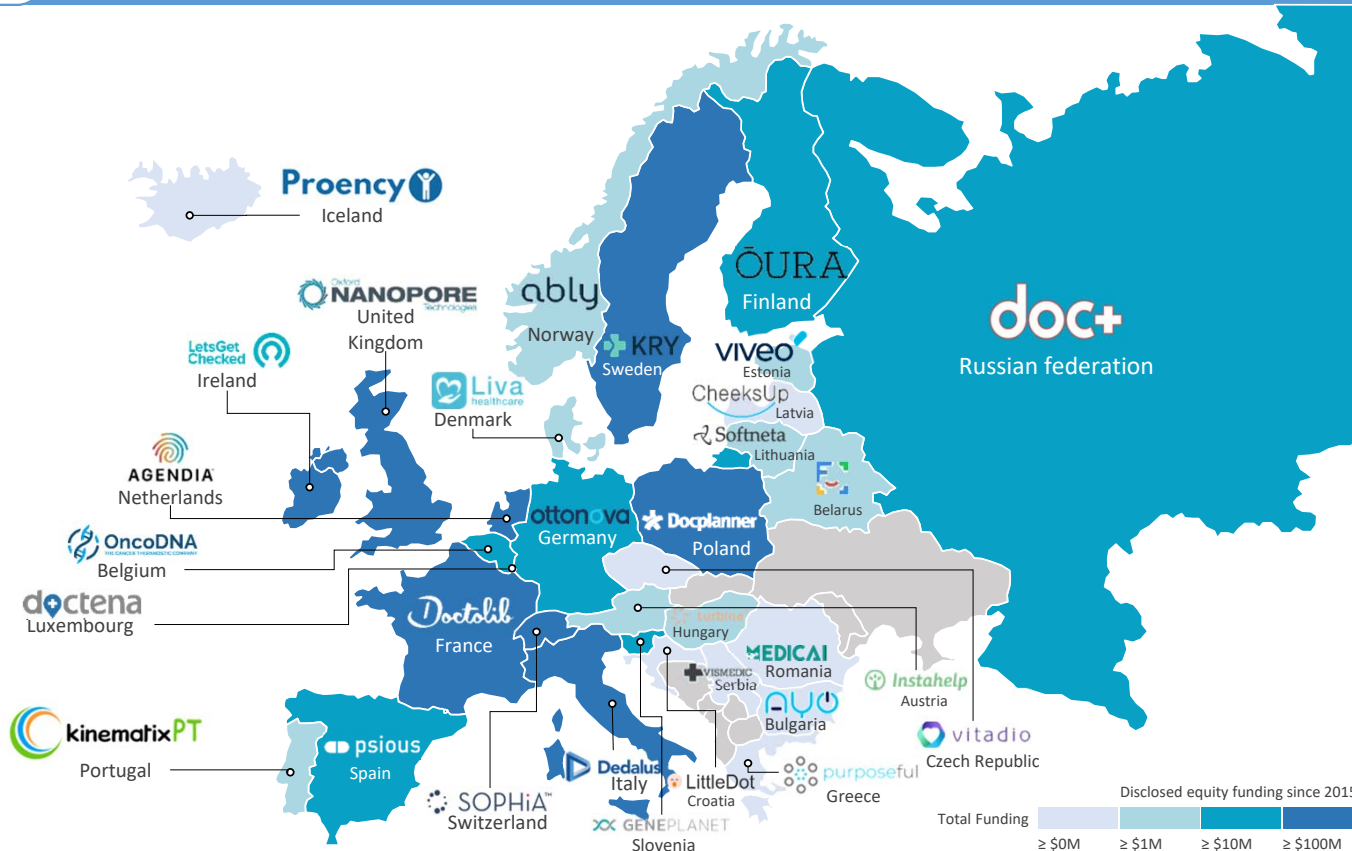
- ▶ In the last 12 quarters to Q3 2020, funds raised by the European Healthcare companies aggregated \$21.6 billion. European digital health startups raised a total of \$6.2 billion in funding in the last 12 quarters to Q3 2020. Of the 106 mega funding rounds (\$100M+) in the last 12 quarters, Europe had seven mega funding rounds.
- ▶ France saw the most activity. Three of the top 10 European digital health investors were based in France: Bpifrance, IDInvest Partners, and Kima Ventures. The most active investors in the European digital healthcare ecosystem were France-based investment bank Bpifrance backing 25 companies (including BioSerenity, Doctolib, and HypnoVR), followed by Germany-based VC firm High-Tech Grunderfonds backing 20 investments and UK-based incubator Entrepreneur First and Germany-based accelerator Startupbootcamp Digital Health with 16 investments each.
- ▶ Even as funding plummeted during 2020 due to the COVID-19 pandemic, investors are making more concentrated bets, both globally and regionally, as share of mid-stage funding deals continues to rise.

Source: CB Insights

Investment Trend Analysis (3/3)




















































































The Most Well Funded European Digital Health Startups



Source: CB Insights

- ▶ The UK-based DNA sequencer maker Oxford Nanopore Technologies is the top-funded digital health startup in Europe with \$740M in total disclosed equity funding.
- ▶ Oxford Nanopore Technologies (\$2.0B valuation, UK) and Doctolib (\$1.1B, France) are two unicorns with disclosed valuations of \$1.0B+.
- ▶ Telehealth in Europe is one of the most attractive segments for the investors. Three of the top 10 startups have a remote care or telemedicine focus, including Doctolib (France), KRY (Sweden), and LetsGetChecked (Ireland).
- ▶ Another popular area of focus is genomics. The major players like Oxford Nanopore Technologies (UK), Agendia (Netherlands), and SOPHiA Genetics (Switzerland) have raised a significant amount of funding from the investors.
- ▶ Eight countries boast top-funded startups that have raised more than \$100M in equity funding, while seven countries have top-funded startups that raised between \$10M and \$100M in funding.

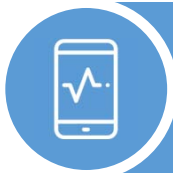
The Most Active 5 Digital Health Investors in Europe

| Investor | HQ | Digital Health Portfolio Companies* |
|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  |  |                  |
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|  |  |               |
|  |  |              |
|  |  |             |

Source: CB Insights

*The list of portfolio companies is indicative not exhaustive

Demand Drivers



Increasing penetration of smartphones

The global health apps market is driven by the increasing penetration of smartphones and the internet worldwide. In 2019, there were around 3.2 billion smartphone users across the world, which was a significant increase from 2.5 billion in 2016. As telecommunication technologies advance over time, people are adopting the latest health applications from the dozens of mobile applications devised by health service entities and startups, all of which contributes to the growth of the digital health market.



Growing need for remote patient monitoring

According to the United Nations Department of Economic and Social Affairs (UNDESA's) World Population Ageing 2019 report, the share of individuals aged above 60 years in Europe is projected to reach 36.6% by 2050, as compared to 20.3% in 2000. This rising share of aged population carry higher chances of chronic diseases (approx. 80% of older adults have at least one chronic disease, and 77% have at least two). This, together with the limited infrastructure and resource, is driving the demand for remote patient monitoring and consulting.



Innovations and their shorter product development time

Progressively, the digital health solutions are developed as an intersection of multiple technologies such as artificial intelligence, sensors-based wearable devices, blockchain and virtual reality among others to transform the landscape of healthcare industry's offerings. Complementing this is the increasingly shorter development schedules of bringing ideas from concept to commercialisation. Independent surveys suggest that the product development and launch cycle for digital healthcare solutions is less than two years.



Policy Support for digital health solutions

Increasing support from government agencies is playing a pivotal role in the development of the digital health market. In June 2018, the EU proposed an investment of \$10.3 billion for the period 2021–2027 to establish a regulatory framework that would fit the digital age. Germany recently enacted a law that entitles citizens already covered under statutory coverage, to avail digital health solutions. France has had legislation in place for teleradiology and telemedicine since 2009 and has a public funding plan in place in the same direction.

Source: PS Market Research

Key European Digital Health Player

| Service Search | Medical Big Data | Monitoring | Genomics |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|     |       |     |    |
| Health and Wellness | Gamification | Devices | Telehealth |
|       |   |       |    |

Source: Meritocracy

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Key Transactions



About the Target

Founded in 2014, Savana develops artificial intelligence (AI) solutions that provide doctors and pharmacists with life-saving insights into patients' healthcare by providing clinical value embedded within existing Electronic Health Records through Clinical Natural Language Processing.

The Transaction

In October 2020, Savana raised \$15 million in B Series funding, led by Cathay Innovation. Other investors include Seaya Ventures, the lead investor in the previous \$5 million round, and new investors, such as MACSF, the French mutual insurer for health professionals.

Funding Highlights

The financing will be used to support Savana's international expansion and operations in the US. Savana's team is currently composed of 100+ professionals and over the next year the team at Savana's headquarters in New York City is expected to grow by between 20 to 30 people.

Management Quote

"With a global network of experts and partners across North America, Europe and Asia, we're looking forward to joining efforts with Savana's talented team to accelerate the company further on the global stage and emerge as a leader in the AI HealthTech market."

- Jacky Abitbol, Partner of Cathay Innovation



About the Target

exocad GmbH is a software company committed to expanding the possibilities of digital dentistry and providing OEMs with flexible, reliable and easy-to-use CAD/CAM software for dental labs and dental practices.

The Transaction

In April 2020, Align Technology, Inc., a manufacturer of 3D digital scanners and clear aligners used in orthodontics, completed the acquisition of privately-held exocad GmbH for approximately \$420 million in cash.

Acquisition Highlights

The acquisition is expected to add Exocad's experience in restorative dentistry, implantology, guided surgery and design to Align's technology portfolio, which includes Invisalign clear-aligner orthodontic and iTero digital solutions. exocad also broadens Align's platform reach in the digital dentistry with close to 200 partners and more than 35,000 licenses installed worldwide.

Management Quote

"Exocad allows us to broaden and deepen Align's digital platform by addressing restorative needs in our end-to-end digital platform that facilitate ortho-restorative and comprehensive dentistry and accelerates adoption of Invisalign treatment among the more than 300 million potential patients worldwide."

- Joe Hogan, Align Technology president and CEO 13

Digital Health Industry: M&A Transactions (1/3)

| Date | Acquirer | Target | Target Country | Target Summary | Deal Value |
|-----------|-------------------------|---------------------|----------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|
| 27-Oct-20 | Harris Computer Systems | K2 Medical Systems | UK | K2 Medical Systems specializes in providing electronic fetal monitoring, decision support and electronic health records. | N/A |
| 13-Oct-20 | Corrona | HealthUnlocked | UK | HealthUnlocked is a social networking service for health. The company uses health-specific artificial intelligence to support patients to better manage their own health, by recommending relevant and tailored health content, information and services to patients | N/A |
| 16-Sep-20 | 10X Genomics | CARTANA | Sweden | CARTANA is a biotechnology company that maps gene expression in brain tissue via In Situ Sequencing (ISS). | \$41.2M |
| 15-Sep-20 | Intersect ENT | Fiagon | Germany | Fiagon develops and manufactures surgical navigation equipment. The Company offers ENT navigation systems for endoscopy and microscopy. | €60M |
| 20-Aug-20 | VitalHub | Intouch with Health | UK | Intouch With Health provides patient flow management and enables NHS Trusts & healthcare organisations to manage all aspects of hospital patient journey. | N/A |
| 03-Aug-20 | HealthHero | Fernarzt | Germany | Fernarzt is a telemedicine platform, simplifying access to medical treatment | N/A |
| 30-Jul-20 | PAI Partners | Amplitude Surgical | France | Amplitude Surgical develops and markets products for orthopedic surgery covering the main disorders affecting the hip, knee and extremities, foot and ankle. | N/A |

Digital Health Industry: M&A Transactions (2/3)

| Date | Acquirer | Target | Target Country | Target Summary | Deal Value |
|-----------|----------------------------|---------------|-----------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|
| 16-Jul-20 | Zur Rose Group | TeleClinic | Germany | TeleClinic is a communication platform that enables secure communication between doctors and patients all over Germany. | N/A |
| 15-Jul-20 | Terumo Corporation | Qirem Medical | The Netherlands | Qirem Medical is a medical device company which develops and commercializes Selective Internal Radiation Therapy (SIRT) microspheres based on the radioisotope Holmium-166. | \$20M |
| 18-Jun-20 | KRY | Helsa | Sweden | Helsa owns and operates a chain of healthcare facilities that offer asthma, psychology, childcare and surgical services for patients. | N/A |
| 17-Jun-20 | Vitec Software Group | Appva | Sweden | Appva provides product Medication and Care Support System (MCSS), a mobile and digital signature app for medication tracking within the municipal care system. | N/A |
| 19-May-20 | Induction Healthcare Group | Zesty | UK | Zesty is a patient engagement digital platform. It allows patients to book their appointments, read their appointment and clinical letters, store a local copy of their clinical record and provide data to their care teams remotely. | £12.7M |
| 19-May-20 | Elekta | Kaiku Health | Finland | The company offers an app that monitors patient-reported outcomes, providing intelligent symptom tracking and management for healthcare providers in routine oncology care and studies. | N/A |
| 28-Apr-20 | Comarch | 2CSI | France | 2CSI is a software publisher and integrator for the world of health and host of personal health. The company offers IT services and ERP software for the medical sector in the French market. | PLN9.5M |

Digital Health Industry: M&A Transactions (3/3)

| Date | Acquirer | Target | Target Country | Target Summary | Deal Value |
|-----------|-------------------|--------------------------|----------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|
| 21-Apr-20 | Astellas Pharma | Nanna Therapeutics | UK | Nanna Therapeutics is a drug discovery company aiming to treat diseases with mitochondrial function such as MELAS and LHON, as well as diseases of the central nervous system, such as Parkinson's, Alzheimer's and Amyotrophic Lateral Sclerosis (ALS). | £12M |
| 16-Apr-20 | Huma | BioBeats | UK | BioBeats creates digital artificial intelligence products to tackle mental health globally. | N/A |
| 5-Mar-20 | Align Technology | exocad GmbH | Germany | exocad is a dental CAD/CAM (Computer Aided Design/Computer Aided Manufacturing) software company serving the medical sector worldwide. The Company provides dental CAD, CAM and scanning software. | \$420M |
| 03-Mar-20 | ePassi Payments | ActiWay | Sweden | ActiWay is a digital health company that offers a flexible system for payment, administration and follow-up of health benefits. | N/A |
| 18-Feb-20 | Citadel Group | Wellbeing Software Group | UK | Wellbeing Software Group is a radiology and maternity software solutions provider that manage patient workflow and data. Its software provides end to end digitisation to build a consolidated view of patient information for healthcare providers. | £103M |
| 14-Feb-20 | Medtronic | Digital Surgery | UK | Digital Surgery is a privately-held pioneer in surgical artificial intelligence (AI), data and analytics, and digital education and training. | \$300M |
| 22-Jan-20 | Quest Diagnostics | Blueprint Genetics | Finland | Blueprint Genetics provides clinical gene testing and customized next-generation sequencing services. | N/A |

Digital Health Industry: Fundraising Transactions (1/4)

| Date of Funding | Strategic/ Financial | Investor Name | Target Company | Series/Name | Money Raised | HQ Country | Description | Other Investors |
|-----------------|----------------------|------------------------------|------------------------|-------------|--------------|-----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------|
| 28-Oct-20 | Financial | Wellington Partners | SidekickHealth | Series A | \$20M | Sweden | SidekickHealth is an evidence-based platform that offers custom gamified digital therapeutics packages for conditions including diabetes, ulcerative colitis and smoking cessation. | Asabys Partners, Frumtak Ventures, Novator |
| 20-Oct-20 | Financial | Fountain Healthcare Partners | Neuromod Technology | Series B | €10.5M | Ireland | Neuromod specialises in treatment of tinnitus, a chronic condition that affects 10% - 15% of global population. | Kreos Capital, Medical Device Resources, Moffett Investment Holdings |
| 15-Oct-20 | Financial | Cathay Innovation | Savana | Series B | \$15M | Spain | Savana deploys AI such as Clinical Natural Language Processing (cNLP) for extracting critical insights from patient records. | MACSF, Seaya Ventures |
| 30-Sep-20 | Financial | Cogito Capital Partners | HomeDoctor | Series A | €3.7M | Poland | HomeDoctor provides online medical consultations and delivery of healthcare services to patients' homes. | Cogito Capital Partners |
| 28-Sep-20 | Financial | Greycroft | SISU Aesthetics Clinic | Series A | \$5.5M | Ireland | SISU is a collection of doctor-led, patient-centric aesthetic medical clinics. | Bullpen Capital |
| 18-Sep-20 | Financial | Ananda Impact Ventures | DrDoctor | Series A | £3M | UK | DrDoctor helps hospitals deliver patient-facing digital solutions. By using web, smartphones and SMS, patients can choose and reschedule appointments, give feedback on services and learn more about what to expect from clinics. | 24 Haymarket |
| 17-Sep-20 | Financial | Sanofi Ventures | Lava Therapeutics | Series C | \$83M | The Netherlands | Lava Therapeutics is a developer of a bispecific antibody platform used to engage gamma-delta T cells for cancer treatment. | Gilde Healthcare, MRL Ventures Fund, Novo Ventures |

Digital Health Industry: Fundraising Transactions (2/4)

| Date of Funding | Strategic/ Financial | Investor Name | Target Company | Series/Name | Money Raised | HQ Country | Description | Other Investors |
|-----------------|----------------------|--------------------------|--------------------------------|-------------|--------------|-----------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------|
| 16-Sep-20 | Angel | Alan Howard | Signifier Medical Technologies | Series C | \$10M | UK | Signifier Medical Technologies is a medical technology company focused on the development and commercialization of innovative and non-invasive solutions for patients with snoring and sleep disordered breathing conditions. | James C. Blair, Kieran Gallahue, ResMed, The Pritzker Organization |
| 11-Aug-20 | Financial | Optum Ventures | Lumeon | Series D | \$30M | UK | Lumeon is a digital health company providing management care solutions to the healthcare industry. | Amadeus Capital Partners, Endeavour Vision, Gilde Healthcare, IPF Partners |
| 06-Aug-20 | Financial | Heal Capital | Infermedica | Series A | \$10.3M | Poland | Infermedica is a digital health company specialized in AI-powered solutions for preliminary diagnosis and patient triage. | Dreamit Ventures, EBRD, Heal Capital, Inovo Venture Partners, Karma Ventures |
| 30-Jul-20 | Financial | Heal Capital | Siilo | Series A | €9.5M | The Netherlands | Siilo is a secure and compliant messaging platform that allows healthcare workers to communicate, share knowledge and research cases. | EQT Ventures, Philips Health Technology Ventures |
| 28-Jul-20 | Financial | Idinvest Partners | Withings | Series B | \$60M | France | Withings is a developer of digital health and wellness smart devices such as fitness trackers and watches. | Adelie, BNP Paribas, Bpifrance, Gilde Healthcare, ODDO BHF Private Equity |
| 27-Jul-20 | Financial | TDJ Pitango Ventures | StethoMe | Series A | \$2.5M | Poland | StethoMe offers AI-powered healthcare and automatic and remote lung and heart screening. | Manta Ray Ventures, Movens Capital |
| 21-Jul-20 | Financial | Amadeus Capital Partners | QUIBIM S.L. | Seed | €8M | Spain | QUIBIM is a biotech company dedicated to medical image processing and extraction of imaging biomarkers for the medical imaging workflows. | Adara Ventures, APEX Ventures, Crista Galli Ventures, Partech, Tech Transfer UPV |

Digital Health Industry: Fundraising Transactions (3/4)

| Date of Funding | Strategic/ Financial | Investor Name | Target Company | Series/Name | Money Raised | HQ Country | Description | Other Investors |
|-----------------|----------------------|--------------------------------|----------------|-------------|--------------|-------------|--------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------|
| 08-Jul-20 | Financial | Par Equity | BrainWaveBank | Seed | £1.1M | UK | BrainWaveBank makes it possible to measure and track brain activity and cognitive performance for anyone, anytime, anywhere. | Techstart Ventures, Clarendon Fund Managers, Angel CoFund |
| 02-Jun-20 | Financial | OMERS Ventures | Vara | Series A | €6.5M | Germany | Vara has developed a CE-certified machine learning platform, which makes it easier for radiologists to focus on detecting cancers in mammograms. | Merantix, Plug and Play, Soleria Capital, Think.Health |
| 28-May-20 | Financial | Ping An Global Voyager Fund | PlusDental | Series C | €32M | Germany | PlusDental is a Berlin-based Health-Tech Startup in the area of digital dentistry. | HV Capital, Lakestar |
| 27-May-20 | Financial | Handelsbanken | Doktor.se | Series C | €45M | Sweden | Doktor.se is a modern and personal care company working with digital healthcare. | Bonnier Ventures, Carnegie, Oriola KD Corporation |
| 26-May-20 | Financial | Think.Health | SpinDiag | Series B | €16.3M | Germany | Spindiag develops an easy-to-use, compact and automated point-of-care system. | - |
| 20-May-20 | Financial | Hil-Invest | UroMems | Series B | €16M | France | The company's devices are used for the treatment of severe stress urinary incontinence, enabling healthcare providers to cure their patients. | Arbevel, Bpifrance, btov Partners, CITA Investissement, Supernova Invest |
| 21-Apr-20 | Financial | Swiss Entrepreneurs Foundation | Lunaphore | Series C | \$2.1M | Switzerland | Lunaphore is a developer of tissue autostainers that use microfluidics to perform assays on cancer patient tissue samples. | - |







Digital Health Industry: Fundraising Transactions (4/4)

| Date of Funding | Strategic/ Financial | Investor Name | Target Company | Series/Name | Money Raised | HQ Country | Description | Other Investors |
|-----------------|----------------------|--------------------------------|----------------------|-------------|--------------|-------------|----------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------|
| 20-Apr-20 | Financial | Temasek Holdings | Alan | Series C | €50M | France | Alan is a digital health insurance platform that offers insurance services by focusing on a price-quality ratio health plan. | Index Ventures |
| 16-Apr-20 | Financial | Seamus Mulligan | Avectas | Series C | \$20M | Ireland | Avectas is a cell engineering technology company that enables drug developers to manufacture potent engineered cell therapies. | - |
| 14-Apr-20 | Financial | In vivo Capital Partners | Pulmobiotics | Seed Round | €2M | Barcelona | Pulmobiotics is a pre-clinical life sciences company. | - |
| 02-Mar-20 | Financial | General Atlantic | Immunocore | Series B | \$130M | UK | Immunocore is a privately owned, clinical-stage, UK-based biotechnology company. | Bill & Melinda Gates Foundation, CCB International, Eli Lilly, JDRF T1D Fund, |
| 05-Feb-20 | Financial | Bain Capital Life Sciences | JenaValve Technology | Series D | \$50M | Germany | JenaValve Technology develops transcatheter aortic valve implantation (TAVI) systems for transapical and transfemoral implantation. | Andera Partners, Gimv, Legend Capital, Neomed Management |
| 10-Jan-20 | Financial | Boehringer Ingelheim | NBE-Therapeutics | Series C | \$22M | Switzerland | NBE-Therapeutics is a privately-owned Swiss, Basel-based biotech company. | PPF Group |
| 07-Jan-20 | Financial | Ontario Teachers' Pension Plan | KRY | Series C | €140M | Sweden | KRY International AB develops digital doctor application. The Company offers paid-for video appointments with a doctor through its software. | Maggie Fanari, Index Ventures, Creandum, Accel |





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Digital Health Industry: Recent developments (1/4)

| Company | Recent Developments |
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|   | <p>Sensyne Health and Microsoft extend partnership “Clinical AI company Sensyne Health has extended its existing association with Microsoft to become a ‘strategic partner.’ The two companies will work together to further develop and refine Sensyne’s clinical AI and health cloud technologies to improve, augment and reduce the cost of patient care” Source: Med-Tech Innovations Date: November 03, 2020 Source Link: https://www.med-technews.com/news/sensyne-health-and-microsoft-extend-partnership/</p> |
|  | <p>PocDoc launches COVID-19 workplace testing to help get Britain back to work “Digital testing platform, PocDoc has launched a testing solution to employers wanting to get people back to work safely. The test is carried out via a finger prick with results being returned in 10 minutes. The results display if someone has an active COVID-19 infection based on the presence of early-onset antibodies and should immediately self-isolate. It will reveal if there is a presence of these antibodies, or if the person is free of COVID-19 up until five to seven days prior to the test” Source: MOBIHEALTHNEWS Date: October 22, 2020 Source Link: https://www.mobihealthnews.com/news/emea/pocdoc-launches-covid-19-workplace-testing-help-get-britain-back-work</p> |
|  | <p>IBM Launches Blockchain-Powered Digital Health Pass for COVID-19 “IBM recently developed a blockchain-powered digital health passport platform to allow individuals to store and share their health status while protecting their privacy. IBM Digital Health Pass will combine various dynamic data sources, including test results and on-site temperature scans, to allow individuals to safely store their health information on their smartphones” Source: Xtelligent Healthcare Media Date: October 20, 2020 Source Link: https://hitinfrastructure.com/news/ibm-launches-blockchain-powered-digital-health-pass-for-covid-19</p> |
|   | <p>Careology and London General Practice deliver remote monitoring for COVID-19 cases “Digital Cancer Care company, Careology has partnered with The London General Practice to launch ‘Careology Connect.’ The platform will allow clinicians to remotely monitor their patient’s COVID-19 symptoms in real-time and intervene if medical attention is needed” Source: MOBIHEALTHNEWS Date: October 07, 2020 Source Link: https://www.mobihealthnews.com/news/emea/careology-and-london-general-practice-deliver-remote-monitoring-covid-19-cases</p> |








Digital Health Industry: Recent developments (2/4)

| Company | Recent Developments |
|-------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  | <p>NVIDIA to build the UK's most powerful supercomputer to aid AI research in healthcare "US tech giant NVIDIA has announced plans to build the UK's most powerful supercomputer, to help healthcare researchers. The Cambridge-1 supercomputer is expected to come online by the end of the year and is intended for artificial intelligence (AI) research into medical challenges, including those presented by COVID-19" Source: MOBIHEALTHNEWS Date: October 06, 2020 Source Link: https://www.mobihealthnews.com/news/emea/nvidia-build-uk-s-most-powerful-supercomputer-aid-ai-research-healthcare</p> |
|  | <p>Ultronics and Mayo Clinic partner up for AI diagnosis of heart failure "A research programme led by US-based non-profit medical centre Mayo Clinic and UK health tech firm Ultronics will apply AI to forecast heart failure. The team will use AI analysis of ultrasound heart scans to identify the markers of heart failure and alert doctors to potential heart failure" Source: MOBIHEALTHNEWS Date: September 30, 2020 Source Link: https://www.mobihealthnews.com/news/emea/ultronics-and-mayo-clinic-partner-ai-diagnosis-heart-failure</p> |
|  | <p>Medical Solutions and Alliance Health Group launch 24/7 virtual GP service "Private provider of remote GP services in the UK and Republic of Ireland, Medical Solutions, has enhanced its partnership with Alliance Health Group (AHG) with the roll-out of 'GP24', a 24/7 virtual GP service. Medical Solutions has worked with AHG, since 2014, providing its GP service to employees within its client base who are part of a private healthcare plan managed by AHG" Source: MOBIHEALTHNEWS Date: September 28, 2020 Source Link: https://www.mobihealthnews.com/news/emea/medical-solutions-and-alliance-health-group-launch-247-virtual-gp-service</p> |
|  | <p>Novartis partnership targets digital health for asthma "Propeller Health is collaborating with Novartis to co-package the Propeller digital health platform with Enerzair Breezhaler, a recently approved Novartis medication developed to treat uncontrolled asthma. This collaboration marks the first time a digital health tool will be packaged and prescribed alongside an inhaled asthma medication" Source: Rapid Life Sciences Ltd Date: July 08, 2020 Source Link: https://www.epmmagazine.com/news/novartis-partnership/</p> |

Digital Health Industry: Recent developments (3/4)

| Company | Recent Developments |
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|  | <p>Incode HealthID Launches to Help Companies Ensure a Safe Return to Work Post-COVID-19 “Incode, a leading provider of secure biometric identity solutions, today announced the launch of Incode HealthID — a multi-step digital health verification solution designed to help companies establish and enforce COVID-19 preventive measures in the workplace, from basic hygiene to clinical lab testing certification. With Incode HealthID, companies can safely resume business operations by creating a transparent workplace for employees and customers via a privacy-centric, consent-based solution” Source: PR Newswire Date: July 08, 2020 Source Link: https://www.prnewswire.com/news-releases/incode-healthid-launches-to-help-companies-ensure-a-safe-return-to-work-post-covid-19-301089979.html</p> |
|  | <p>Pfizer and SidekickHealth collaborate to launch a digital medication management and lifestyle platform across Europe “Pfizer is partnering with Nordic digital therapeutics company SidekickHealth to advance patient wellbeing across Europe via a digital therapeutics platform. The solution combines scientific expertise and digital technologies, giving patients a new tool to help them maintain healthy lifestyles, improve their disease management and quality of life, while providing guidance and resources to facilitate easier and faster communication between them and their healthcare professional” Source: PharmiWeb.com Date: June 29, 2020 Source Link: https://www.pharmiweb.com/pwtoday-story/pfizer-and-sidekickhealth-collaborate-to-launch-a-digital-medication-management-and-lifestyle-platform-across-europe</p> |
|  | <p>Happify Health, AHA partner to release heart health-focused digital mental health program “Happify Health has developed and launched a new digital mental health program with the American Heart Association (AHA) that aims to reduce stress and encourage healthy behaviors among people with high blood pressure and high cholesterol” Source: MOBIHEALTHNEWS Date: June 23, 2020 Source Link: https://www.mobihealthnews.com/news/happify-health-aha-partner-release-heart-health-focused-digital-mental-health-program</p> |
|  | <p>Athenahealth launches new EHR-embedded telehealth tool “Athenahealth announced this week that it had launched an embedded telehealth tool to allow practitioners to conduct virtual visits without having to download separate software or use another third-party app. The Watertown, Massachusetts-based cloud computing vendor said athenaTelehealth – which is free for its athenaOne electronic health record tool customers until September 30 – enables providers to more easily conduct HIPAA-compliant telehealth visits within practice workflows, from scheduling to patient messaging, video conferencing, simultaneous-encounter documentation and billing” Source: HealthcareITNews Date: June 11, 2020 Source Link: https://www.healthcareitnews.com/news/athenahealth-launches-new-ehr-embedded-telehealth-tool</p> |

Digital Health Industry: Recent developments (4/4)

| Company | Recent Developments |
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|  | <p>SF Digital health company launches new feature to help physicians securely video call patients "A San Francisco-based professional medical network launched their new video call tool allowing doctors to safely and securely video call their patients. Doximity serves as the largest network of U.S. physicians and is now offering free access to front line workers to its new Dialer Video tool" Source: KRON4 Date: May 07, 2020 Source Link: https://www.kron4.com/features/kron4-heroes/digital-health-company-launches-new-feature-to-help-physicians-securely-video-call-patients/</p> |
|   | <p>Babylon teams up with Mount Sinai to launch AI-based app in New York City "British startup Babylon Health is rapidly expanding its presence in the U.S. market by teaming up with Mount Sinai Health Partners to roll out its app to millions of New Yorkers. The partnership brings 24/7 access to digital healthcare service to millions of New York residents, the organizations said" Source: Questex Date: May 07, 2020 Source Link: https://www.fiercehealthcare.com/tech/babylon-health-partners-mount-sinai-to-launch-ai-based-app-new-york-city</p> |
|  | <p>Digital health company launches COVID-19 care assistant "Digital health company Babylon has launched a new care assistant that is designed to help patients during the COVID-19 pandemic. The service provides information and care for patients according to their need, allocating doctors' time to the patients who need it most. Patients can check their symptoms, track their illness, chat with trained staff and consult doctors, with the tool also hoped to help people cope with self isolation" Source: Med-Tech Innovations Date: March 25, 2020 Source Link: https://www.med-technews.com/news/digital-health-company-launches-covid-19-care-assistant/</p> |
|    | <p>Mastercard partners with North Macedonia on digital identity solutions "Patients at Southmead Hospital in England could soon see robots help them recover after surgery in a new partnership between the North Bristol NHS Trust (NBT) and the Bristol Robotics Laboratory. The organizations have announced that they will be working together to explore the potential of healthcare technologies in further improving patient outcomes and hospital experience" Source: MOBIHEALTHNEWS Date: January 23, 2020 Source Link: https://www.mobihealthnews.com/news/emea/southmead-hospital-inks-partnership-bristol-robotics-laboratory</p> |

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