



CTA DIGITAL HEALTH

2020 DEALBOOK



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2020 CTA DIGITAL HEALTH DEALBOOK

INTRODUCTION

The CTA Digital Health program was launched this year to enable Canada’s most promising early-stage digital health start-ups to secure market intelligence, strategic guidance and access to key stakeholders in two of the most dynamic innovation hubs in the US: San Francisco and New York. The program is led by the Canadian Consulates in San Francisco and New York, and is delivered in step with industry-leading partners from across the digital health landscape.

The CTA Digital Health program began with a national recruitment effort designed to identify up-and-coming founders and technology from Canada’s diverse digital health ecosystem. Leading US venture capitalists and industry stakeholders evaluate the applicants based on their potential for growth in each market and select the top scoring companies to participate. This dealbook offers a vantage point on Canadian digital health companies that are positioned to succeed in the US market and beyond.

The program will be delivered virtually over the course of 14 weeks in the fall of 2020. There will be multiple opportunities for the cohort to connect with potential US investors, customers and strategic partners throughout the program and at industry events including Rock Health Summit and HITLAB Innovators Summit. The companies will hear from experts on pitching, fundraising, sales, marketing, tax and legal questions as well as other topics. This training is designed to help the companies succeed in building their US market presence for the long-term.

This dealbook provides an overview of the traction and aspirations of each company and should provide insight into some of Canada’s capabilities in digital health. We’re proud to introduce you to these companies and would welcome opportunities to find tailored matches that meet your investment interests and strategic needs.



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ANDGO SYSTEMS

Absent Management Automation and Communication Platform used by Healthcare Organizations to Automatically Fill Vacant Shifts

andgosystems.com Saskatoon, SK



PRODUCT SUMMARY

Andgo specialises in smart absence management by automating staff scheduling to eliminate vacancies in real-time. We help healthcare organizations solve complex scheduling practices by creating customized workflows that ensure the right person is available at the right time. The Andgo platform is a complete end-to-end solution that streamlines the process of receiving and filling employee’s planned and unplanned leave requests. Andgo ensures all actions are in line with organizational requirements to close the loop on absence management for healthcare organizations.

CUSTOMER

Our customer is healthcare organizations who must fill the vacancy that is created from an employee calling in sick. Within these healthcare organizations we sell to through the HR and operations departments to the director level. This individual is looking to meet the department goals set by their VP and is looking for ways to create operational efficiencies which we are able to provide by automating the process of filling vacant shifts and filling the shift with the best possible candidate.

SEEKING

- We hope to expand our network of allies, technology partners and referral partners so that we can:
1. Gain access to prospective customers and decision makers in North American healthcare providers
 2. Identify a strategic growth partner for a scaling SaaS company.
 3. Complete a fundraising round of ~\$3M USD by connecting with suitable investors throughout the North American market.

MARKET SIZE

\$17.6 BILLION TAM

Source: Markets And Markets

IMPACT

We have a clear path to \$10 million ARR and It will take ~25 more clients to get there.

TRACTION

1. Over 140,000 healthcare stakeholders have access to the Andgo platform.
2. Andgo has maintained a 100% client retention rate since being founded in 2014.
3. Andgo customers are able to fill their vacant shifts 7x more efficiently.

TOP TAKEAWAYS

- 1 Between 2018 and 2019, we doubled our teams size and increased our revenue by 87%. Revenue is expected to increase by 30% in 2020 from 2019 levels, even with the new business delays caused by COVID on our sales operations.
- 2 Fully bootstrapped, we are approaching \$3M USD ARR.
- 3 Andgo specializes in automating absences management within complex environments. Simple apps and easy to download software can not cope with complex environments found in large Healthcare systems.
- 4 As a Kronos technology partner, we have recently seen the impact that working with a channel partner has on our business. In the past year, through Kronos, we have been brought in on a number of deals that we would not have previously accessed. The impact from opening three or more similar channels would be significant.

LEADERSHIP



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CARETEAM TECHNOLOGIES

The Virtual Care Collaboration Platform that Simplifies the Complexity of Healthcare

careteam.tech Vancouver, BC



PRODUCT SUMMARY

Careteam has developed a next generation virtual care coordination platform centered around the patient and the family enabling multidisciplinary teams and cross-organizational collaboration across the ecosystem. Our unified, secure and workflow-enabled platform is a smart overlay to EMRs and can be set up in hours to enable care teams to: 1) Quickly identify and manage at-risk patients; 2) Implement and monitor care plans; 3) Encourage patient self-management; and 4) Facilitate secure communication with all stakeholders.

Having implemented our proprietary Privacy by Patient™ methodology which obviates the need for health organizations to sign BAAs to share information, Careteam enables digital health at scale for health ecosystems, provides patients a single location to understand their next best action for managing their healthcare and feel supported in their care journey across the care continuum.

CUSTOMER

US payors and providers responsible for complex and chronic disease patients who need to manage patients effectively with care coordination workflows that aim to optimize the entire value chain of patient care (in transition, in the community and at home) in order to optimize patient engagement, health and financial outcomes.

SEEKING

We are interested to:

- Get our first 10 reference customers in the US.
- Raise our Series A with visionary investors.
- Identify strategic partners who can accelerate our go to market.

We are working on a huge and difficult challenge for patients, providers and health organizations, that is both worth solving and represents an opportunity to create one of the new giant tech companies in healthcare. We need advisors, connectors, champions who believe that we should and can accomplish this change in spite of all the obstacles.

MARKET SIZE

\$1.55 BILLION
TAM

Source: Frost & Sullivan

IMPACT

In the next year, we can transform the experience of healthcare for over 100,000 highly complex patients.

TRACTION

- Current customers and partners include health organizations and tech companies, including focus on complex chronic conditions including dementia, cancer, pediatrics, addictions, eating disorders, CKD, COPD and CHF.
- All in one solution for support of aging patients at home, especially during COVID crisis, for their health and social needs.
- Top 100 company and Quarterfinalist in the UCSF 2020 Digital Health Awards - COVID category.

TOP TAKEAWAYS

- 1 Leadership team has deep 15+ years each health and tech expertise, combining together to create a 4G company - aim to do GOOD, do it GREAT, be GLOBAL and GIVING, by combining strengths in four key areas: clinical, product, adoption and sales.
- 2 We have focused on a vision for a patient-centered solution that spans the fragmented ecosystem and to accomplish this, learning as much as we can about what works and how to scale.
- 3 Health tech has generated and continues to generate amazing innovations focused on a specific need, situation or user. We can create real breakthroughs in experiences, outcomes and costs, by creating a rapidly deployable horizontal integrator that connects the health system, the patient and all of these innovations.

LEADERSHIP



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CONQUER EXPERIENCE

Digital Simulation Platform for Surgical
Training and Assessment

conquerexperience.com Surrey, BC



PRODUCT SUMMARY

Our award-winning product PeriopSim (www.periopsim.com) is a Virtual Reality (VR), desktop and tablet digital experience based training solution for clinical educators and periop staff in the operating room. PeriopSim is an evidence-based solution that is 6x faster than traditional comparable solutions where an hour-long procedure takes ten minutes in simulation. The platform enables surgical staff in cardio, neuro, ortho and general surgery to practice safely before surgery and achieve and maintain competence more quickly.

CUSTOMER

We focus on education during the early stages of career as well as for life long learning. There are 2 key customer segments we sell to 1) Colleges where Surgical Technology Program Directors add PeriopSim to their curriculum and 2) Hospitals, where the Director of Surgical Services purchases PeriopSim for orientation and life long learning.

SEEKING

We are focused on closing our Seed round not later than March 2021 and targeting a raise of \$2M USD. We are looking for investors with expertise in Digital Health, Education Technology and with experience investing outside of the US. Strategic investors like MedTech and Medical Device companies would be also a potential fit.

MARKET SIZE

\$10.2 BILLION
TAM

Source: marketwatch

IMPACT

Becoming the gold standard of healthcare experiential education for over 3,400,000 clinicians globally.

TRACTION

- To date, 1,000+ learners have received training on our platform.
- Currently, 87 hospitals are using PeriopSim as part of their perioperative curriculum with 90% of repeat customers.
- Our product is used in 47 surgical technology education college programs.

TOP TAKEAWAYS

- 1** TECHNOLOGY and TEAM: The award winning platform is scalable and accelerates content creation, distribution and assessment. It was developed based on the teams experience developing and shipping "Triple-A" simulation video game titles at Electronic Arts as well as over 100 digital enterprise mobile apps.
- 2** MARKET FIT: We have fit in 2 customer segments with sales and ARR. During the pandemic we've seen acceleration. We've been selected as the perioperative training standard for a number of health systems and are growing our content partnerships. Customers include University Hospitals in Cleveland, CHI Health and Boston Children's Hospital.
- 3** PARTNERSHIPS: Substantial global partnerships have been developed with top brands including MedTech company Siemens Healthineers and VR manufacturer HP.

LEADERSHIP



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HYIVY HEALTH

Intelligent and Holistic Pelvic Rehabilitation for Women

hyivy.com Waterloo, ON



PRODUCT SUMMARY

Hyivy Health was founded out of a personal experience by the founder who was diagnosed with cervical cancer June 2019 and introduced to a community of women who experienced issues with after-care for pelvic health treatments. To alleviate symptoms and improve everyday quality of life while reducing the stigma around pelvic health, Hyivy Health creates the first intelligent and holistic pelvic rehabilitation device for women experiencing complications from pelvic health related illnesses. Our device provides real time information and treatment from multiple sensors and mechanical functions to help keep track of progress, educate patients and adapt treatment plans for more comfortable rehab experiences. Our goal is to get a better understanding of the pelvic floor, how to treat it effectively and understand what treatment is best for certain diagnoses to drive standardization and data-backed decisions for gynecological health.

CUSTOMER

We sell to the 1 in 3 women dealing with pelvic health issues worldwide. There are over 43M women in North America experiencing pelvic health complications who are at an average age of 40-45, are health conscious, and have often experienced many stages of life which impact pelvic health including childbirth and/or menopause. Our research states that 85% of these women are looking for new rehabilitation products to try and help alleviate their symptoms and improve their overall quality of life.

SEEKING

We are seeking \$750,000 USD to ramp up our North American manufacturing, continue our medical research, launch our product through our presale, start gathering data on a wide population of women with consistent use of our device and prepare for our FDA regulatory filing and clinical studies.

MARKET SIZE

\$8.9 BILLION
TAM

Source: Grand View Research

IMPACT

With our product launch scheduled for 2021, our goal is to help improve the quality of life of 500,000 women dealing with pelvic health issues.

TRACTION

- 150 users are currently signed up for testing and purchase of the product.
- 1 NDA signed with Google.
- 3 LOIs signed with are pelvic health clinics and are working with over 15 different doctors through our medical advisory board.

TOP TAKEAWAYS

- As an experienced entrepreneur and start-up ecosystem expert, Rachel Bartholomew founded Hyivy Health after connecting with a community of cervical and gynecological cancer survivors as she underwent treatment herself. After validating her idea from a clinical perspective through the doctors who were providing her care, she endeavored to create the first holistic device that treats, monitors, tracks and prevents all of the different pelvic symptoms that women experience.
- By introducing data during therapy, we can start to have a better understanding of the pelvic floor and determine the best treatments per diagnosis while also increasing standardization for the medical industry.

LEADERSHIP



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IREGAINED

Standing United in Our Dream to Help Stroke Patients Reclaim Their Lives

iregained.ca Sudbury, ON



PRODUCT SUMMARY

Stroke is a life changing event. The impaired hand function from brain damage makes it very difficult to interact with everyday environment. Mundane tasks such as holding a cup, combing hair or using a restroom, which able-bodied people take for granted, may be severely compromised and have a negative impact on overall quality of life. There is currently no solution that is affordable or effective to regain this lost hand function.

CUSTOMER

IREgained will initially target establishments that employ physiotherapists and/or occupational therapists to offer rehabilitation services such as rehab hospitals, long term care facilitates and physiotherapy hospitals to stroke survivors and/or brain injury patients to improve hand function. Through clinician referrals, IRegained will eventually also focus on a second customer base; patients who have sustained a stroke or brain injury from war, road traffic accidents or an industrial accidents.

SEEKING

IREgained is seeking advice, guidance and constructive feedback on:

- Series A round investors to attain our \$5M USD round
- High profile early adopter stroke rehabilitation clinics, hospitals, rehab hospitals and long-term care organizations
- Introductions to post stroke rehabilitation patient advocacy groups
- Constructive comments on our go-to-market strategy
- Expertise in US market access and reimbursement pathway

MARKET SIZE

\$30 BILLION
TAM

Source: Markets & Markets

IMPACT

By the time we reach scale in 2023, IRegained is expecting to serve 150,000+ users to enable hand function rehabilitation.

TRACTION

IRegained's MyHand system is the world's only clinically validated, post-stroke, hand function telerehabilitation system specifically designed for use both in the clinic and in a patient's home, under the telemedicine guidance of a rehabilitation professional. We have received a substantial number of purchase commitments both from clinics and individual patients.

TOP TAKEAWAYS

- 1 IRegained's MyHand system addresses a large, growing and poorly met market need. Globally, 100 million people affected by stroke are living with hand function disability and can benefit from our system. This represents a market opportunity of \$30B USD.
- 2 Our strong IP portfolio presents a high competitive barrier (national phase filing in the USA, Canada, India, EU and China) while our Class I medical device classification presents a low regulatory barrier and a faster time to market.
- 3 We have a stellar team with breadth of expertise and depth of experience that will execute on our plan to bring this product to market. Further, a clear and existing reimbursement pathway ensures long-term sustainable revenues.

LEADERSHIP



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MANAGINGLIFE

Lowering the Human and Financial
Cost of Chronic Pain

managinglife.com Toronto, ON



PRODUCT SUMMARY

Manage My Pain helps patients, doctors and case managers better measure, monitor and manage chronic pain. We bring together 3 components:

- 1. Mobile apps for patients to track their pain, function, and medication use – we highlight patterns and trends for self-management.
- 2. Clinical reports translate patient experiences into summaries that help doctors improve treatment plans.
- 3. A remote monitoring portal allows patient progress to be monitored outside the clinic and between visits using advanced analytics that flag at-risk trends.

CUSTOMER

We license our solution to organizations who financially benefit from the better management of pain. This includes:

- Employers: Improved productivity, reduced absenteeism, and fewer health/disability claims to their group benefits.
- Health plans: Fewer Medicare Advantage claims, differentiated plans, non-claim data from opioid-consuming populations to inform policy, product, and marketing.
- Disability carriers: Reduced claim durations, fewer STD to LTD conversions.

SEEKING

We will be raising \$5-8M USD that we hope will be led by a US-based institutional investor that has other digital health companies in their portfolio. We have demonstrated our solution’s ability to improve clinical outcomes and reduce disability costs. Our next phase of growth will involve replicating this success in partnership with US-based health plans, health systems, and disability carriers.

MARKET SIZE

\$1.8 BILLION
TAM

Source: National Institute of Health

IMPACT

Our mission is to become the global digital standard for managing chronic pain, and we expect to help over 100,000 people with chronic pain within 3 years.

TRACTION

More than 45,000 people from 130+ countries have used Manage My Pain. Our solution has been used by 7 hospitals, including a VA hospital in San Francisco, and it’s licensed by two insurers with 2.5M+ covered lives. We have collected 1.6M+ entries, making our proprietary dataset one of the largest in the world.

TOP TAKEAWAYS

We’re the only digital solution for chronic pain that works, and we have the evidence to back it up.

- 1 Strong engagement: Our 30-day retention rate is >50%, which is 3x better than top-performing health apps according to an industry report by Adjust.
- 2 Clinical validation: A 2-year multi-site study validated our solution’s positive impact on clinical outcomes, making ours the only digital pain solution for chronic pain with such evidence. The paper is authored by researchers at Canada’s largest academic hospital and should be published before the year-end.
- 3 ROI in disability: In a 2-year pilot with an undisclosed disability carrier, clients on disability who used our solution had an average of a seven-month shorter claim duration compared to similar clients who did not use our solution, representing ~\$20K saved per client.

LEADERSHIP



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Dylan Cowley
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OPTT

Modernizing Patient Treatment and Engagement in Mental Health

optt.ca Toronto, ON



PRODUCT SUMMARY

OPTT is a digital mental health platform that equips healthcare organizations with a comprehensive package of AI-assisted digital telepsychiatry capabilities and intelligent solutions, including clinically validated pre-designed therapy content, analytical capabilities, and personnel training. Our solution is enabling customers to provide services online at a fraction of traditional cost while increasing their capacity by up to 10x. More importantly, OPTT leverages the new capacities provided by the digital delivery of mental healthcare to develop a holistic and comprehensive approach that not only addresses patients’ current clinical needs but also predicts, prevents, and manages any future relapses.

CUSTOMER

With our goal to incorporate digital mental health support as a core primary care offering, our customers are value based primary care providers such as FQHCs and ACOs, plus more modern primary care networks. Using OPTT, these organizations can offer mental health care at a fraction of their current cost and time, increasing their profit margin and customer base.

SEEKING

We are looking for strategic investors, who can help us with increasing the number of users, to improve the performance of our unique AI therapy assisting tools. The long-term goal is to attract more prominent providers, including insurance and pharmaceutical companies, who are looking to reduce their behavioral health management costs through smart AI-powered triage and treatment assistant tools.

MARKET SIZE

\$280.5 BILLION
TAM

Source: SAMHSA

IMPACT

Our goal is to help sixty million people living in North America manage their behavioral health needs using our clinically validated and continuous care plans.

TRACTION

Currently, we serve approximately 1,000 patients on our platform across 5 clinics/hospitals, running multiple clinical trials in a range of different acute and chronic diseases. We have also closed our first major commercial contract with the second-largest Canadian telemedicine company, giving us access to more than 500,000 of their users.

TOP TAKEAWAYS

- 1 Digital and asynchronous delivery of online mental healthcare is needed to significantly expand capacity for care while keeping it accessible and affordable.
- 2 OPTT provides healthcare organizations with a comprehensive package of digital telepsychiatry capabilities and intelligent solutions to provide their services online and to scale their capacity up to 10x.

LEADERSHIP



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VOXNEURO

Breakthrough Brain Assessment
Measures Neuromarkers to Reliably
Inform Brain Health Management

voxneuro.com Hamilton, ON



PRODUCT SUMMARY

VoxNeuro’s Cognitive Health Assessment™ is the first assessment in the world that reliably measures all core brain functions. These functions reflect mental abilities that allow us to live healthy, independent lives, like memory, concentration, and decision making. The breakthrough EEG-based neuroimaging assessment differentiates between true cognitive decline and perceived decline caused by situational factors like stress, fatigue or mood. Early adopting healthcare professionals describe it as a “true stress test for the brain’s core functions”. The results help them make informed treatment decisions with actionable data about brain health.

CUSTOMER

Our primary target is rehabilitation/medical imaging clinics and hospitals. Global healthcare systems lose billions of dollars each year due to the subjective and inefficient cognitive assessment and treatment methods that are available today. There is an intrinsic need of optimization by way of rapid, objective cognitive assessments.

Targets closely behind this beachhead: military and veterans affairs and sports organizations who have service members and players at high risk of brain injury; and clinical trial organizations in need of reliable measures of cognitive function for Pharma, Biotech, Marijuana/Psilocybin efficacy.

SEEKING

- Investors - Commitment on \$15M Series A (mid-2021), US healthcare expertise, support on scale-up e.g. access to prospective clients and KOLs, media exposure, introductions to strategic partners.
- Customers - formal intent to integrate VoxNeuro’s system into their practices i.e. formal commercial contracts.
- Strategic Partners - Investment, scale-up support, US healthcare expertise, R&D for future applications within VoxNeuro’s existing development pipeline.

MARKET SIZE

\$17 BILLION
TAM

Source: Businesswire, Stockhouse

IMPACT

Today’s gold standard of cognitive assessment is estimated to cost the American economy over \$243B annually; VoxNeuro will drastically reduce this burden once at scale by 2023.

TRACTION

VoxNeuro’s M.V.P. is operational in Canada with Toronto Rehabilitation Institute (UHN), St. Joseph’s Healthcare Hamilton and two private clinics in the Greater Toronto Area. The SaaS iteration is complete and we have secured ISO 13485 certification.

The assessments are funded through extended benefits, automotive and worker’s compensation insurance.

TOP TAKEAWAYS

- VoxNeuro is the only neuroimaging tool in the world designed to inform cognitive rehabilitation that can objectively and reliably measure brain function - commonly thought of as mental abilities, like memory, attention and decision making. It is a neurological assessment that cannot be influenced by a patient’s ulterior motivations or beliefs about their injury, removes trial-and-error from treatment that is expensive and time consuming, and mitigates the risk of misdiagnosis and inappropriate care.
- The science and R&D risk is behind VoxNeuro, backed by over 30 years of peer-reviewed and globally funded research. We are Health Canada cleared, anticipate FDA clearance (510K) by Q1 2021 (pre-sub meeting complete) and we are in a block-and-tackle phase of scaling the business.
- Brain function is the future: Neuralink, Kernel, MindMaze and now VoxNeuro.

LEADERSHIP



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ZILIA

Quantifying Biomarkers in the Eye
for Better Clinical Outcomes

ziliahealth.com Québec, QC



PRODUCT SUMMARY

Zilia has developed a non-invasive platform technology that uses imaging, spectrometry and artificial intelligence to quantitatively measure different biomarkers in the human eye. Zilia’s initial product, Zilia Ocular, is the first retinal camera to quantify oxygen saturation, a crucial biomarker in the three main causes of blindness: glaucoma, diabetic retinopathy and age-related macular degeneration. Zilia aims to revolutionize the prevention, diagnosis and management of these diseases by generating actionable data about the eye’s metabolic activity.

CUSTOMER

Currently, our customers are optometry and ophthalmology research institutions. Their goal is to acquire new insight on metabolic activity of the eye in health and in disease, and to make discoveries impacting the clinical management of ocular diseases.

Once Zilia Ocular is cleared by the FDA, the product will be launched in the eye care clinical market. We aim to make Zilia Ocular a gold standard for ocular diseases management for all eye care professionals.

SEEKING

We want to open channels with US investors for our next round of fundraising planned for 2022.
We also aim to network with potential distributors specialized in ophthalmology, as well as experts with experience in market entry and market access in the US.

MARKET SIZE

\$500 MILLION
TAM

Source: Credenceresearch

IMPACT

Zilia envisions a world where its platform technology is used throughout the healthcare sector to facilitate early diagnosis, reduce healthcare costs and improve the quality of life of patients.

TRACTION

In the MedTech sector, the costs of clinical trials are significant, easily reaching the \$100,000’s to \$1,000,000’s scale. There is so much enthusiasm for Zilia’s technology that research centers are eager to collaborate, adopt the technology and share data with Zilia. This greatly reduces the costs of conducting clinical studies. Pharmaceutical companies are approaching Zilia to use its device to validate their drug claims. Zilia has already signed four letters of intent with major distributors in Europe and Latin America for the promotion of its device and is in discussion with several others.

TOP TAKEAWAYS

- 1 Despite recent and constant technological improvements in eye care, the majority of diagnoses are made late because existing tools focus on assessing damages already made to the eye. There is a clear unmet clinical need for early assessment of biomarkers linked to ocular diseases. Oxygen saturation is a crucial biomarker for ocular diseases including those that cause the 3 main causes of blindness. This prompted the development of the first application of Zilia’s platform technology, which quantifies oxygen saturation to enable earlier diagnosis and treatment.
- 2 There is expressed interest from pharmaceutical companies to develop drugs that increase oxygen saturation, further perpetuating the consensus on the importance of ocular oximetry measurement in clinical settings.
- 3 With the exact same hardware and platform, Zilia can assess a vast array of biomarkers present in the eye. Potential applications range from neurology, cardiology, oncology to intensive care, and more. Work is already underway to expand capacities towards assessing a critical biomarker associated with a neurological disease.

LEADERSHIP



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360MEDLINK

Providing Digital Medicine to Optimize Care for Special and Vulnerable Populations

360medlink.com Montreal, QC



PRODUCT SUMMARY

Our flagship product TAVIE helps patients build self-efficacy and adopt positive behaviors to successfully manage their health and recommended treatment through a personalized coaching approach, based on a well established scientific model for sustainable behavior change. With over 16 scientific publications and clinical outcomes internationally, TAVIE is the ideal treatment companion tailored by therapy, language and cultural preferences.

CUSTOMER

Customers that will benefit from our products include pharma and biotech companies as well as government institutions. We provide solutions that are cost-effective, scalable and easy to deploy. During past 10 years we have gained a successful track record of working with these segments, which creates a compelling case for new prospect clients.

SEEKING

- New clients who can use our TAVIE product or are in need of a custom built health app.
- Investors looking to participate in our \$3-4M Series-A raise who are interested a fast growing market with a revenue-generating company that serves blue chip clients and develops products that patients love. We are a strong team that has developed business that is self-funded, has low operating costs and consistent revenue growth.
- Strategic partners including software providers working within medical services or government institutions as well as pharma and other stakeholders that can help expand our market penetration and create synergies that improve our value proposition to key opinion leaders.

MARKET SIZE

\$5.6 BILLION TAM

Source: Cancer.org

IMPACT

The impact of COVID19 highlighted the variety of social determinants of health (SDoH). Vulnerable populations require more personalized care, better access to treatment and to clinical trials.

TRACTION

1. Following implementations in North America and Europe, our product demonstrated positive clinical outcomes with increase in adherence (12%) and high satisfaction 98%.
2. Multiple contracts signed with leading pharma/biotechs and state government (US).
3. With no capital raised we continue to grow revenue organically, and collect numerous industry awards/recognition.

TOP TAKEAWAYS

The digital therapeutics industry is growing at an exponential rate. Although increasingly crowded, we are focused in an underserved segment with an amazing product liked by patients, providers and payors. Most of our competitors have successfully raised large Series-A and B rounds, yet achieved much less than us from the ROI point of view. The main three takeaways are the following:

- 1 Market: Large market with great outlook. Growing brand recognition. Strong product portfolio.
- 2 Money: Lean company, efficient use of cash. Strong recurring revenue and long-term clients.
- 3 Momentum: Demand for our products from large clients. Well positioned to compete with or complement other industry players.

LEADERSHIP



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