

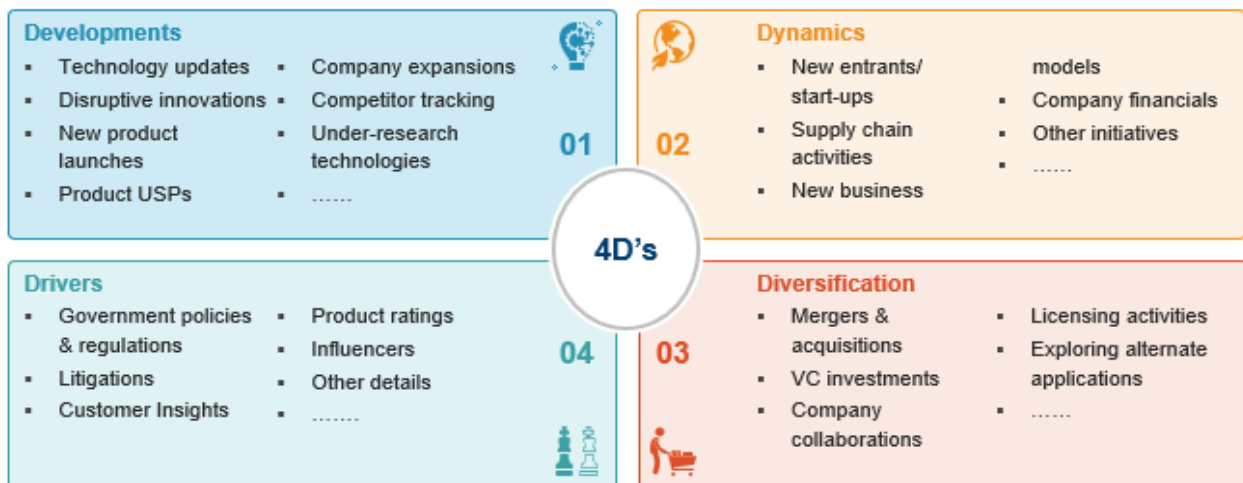
INTELLOTRACKER

Close-To-Home Peritoneal/ Hemodialysis

May 2023



ARANCA'S QUARTERLY SECTORIAL UPDATE ACROSS FOUR DIMENSIONS....





DEVELOPMENTS

New Product/Service Launch	monogram health	Monogram Health now offers its in-home services to Cigna Medicare Advantage customers across the US. Older adults with chronic kidney conditions can access specialized care at home, including primary and specialty visits, medication management, dialysis coordination, and social services. Source: PR News Wire
New Product/Service Launch	ASN	ASN funds fellow scholarships for home dialysis training and launches a 12-month virtual program on home dialysis education. Source: Healio
New Product/Service Launch	FRESENIUS MEDICAL CARE	New home dialysis training unit launched at Indianapolis Fresenius Kidney Care, offering innovative training for patients seeking dialysis treatment at home. Source: PR News Wire
New Product/Service Launch	Northern Lights Health Centre	The hemodialysis units at St. Therese-St. Paul Healthcare Centre and Northern Lights Regional Health Centre in Fort McMurray expanded hours, bringing care closer to home for 6 patients in each community, benefiting convenience and supportive connections. Source: Alberta Health Services
New Product/Service Launch	Davita	Kerrville's new Davita Dialysis Center on Hill Country Drive, opening in March 2023, will accommodate more patients. About 30-35 receive home dialysis with smaller machines, supervised by trained "care partners." Source: Kerrville's Hometown Newspaper
Technology/Innovations	liberDi	Israeli company liberDi receives FDA approval for a groundbreaking home digital dialysis system, allowing patients to do dialysis at home safely and conveniently, revolutionizing traditional in-clinic care. Source: Israel 21C
Technology/Innovations	Adventist HealthCare	Adventist HealthCare Rehabilitation in Maryland offers in-house hemodialysis for local rehabilitation inpatients, ensuring convenient access to necessary dialysis services. Source: Company News
Technology/Innovations		Doug Nichols, a former computer programmer, invented a portable dialysis system to continue his peritoneal dialysis while traveling. Using a car's 12-volt supply, he created a system to warm the dialysis fluid, allowing him to enjoy road trips without compromising his treatment. His innovation impressed his doctors and inspired other dialysis patients. Source: ABC News
Technology/Innovations	monogram health	Monogram Health transforms polychronic care by modernizing kidney care and enabling it to be delivered at home, revolutionizing the way patients receive treatment. Source: Forbes



DYNAMICS

Strategic Actions	Baxter	Baxter's upcoming spinoff of its Renal Care and Acute Therapies units will create an independent kidney care company, prioritizing home-based therapies to enhance outcomes for over one million patients across 70+ countries. Source: Company News
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DRIVERS

Government Policies & Regulations		A Hawaii bill supported by Baxter International aims to simplify regulations and lower costs for importing dialysis products, facilitating in-home treatment. Source: Civil Beat
Government Policies & Regulations	CMS	The Centers for Medicare & Medicaid Services (CMS) has issued stricter guidelines for nursing homes offering home dialysis services to ensure effective and safe treatments for residents receiving this option. Source: McKnights News
Influencers	FRESENIUS MEDICAL CARE	Dr. Brigitte Schiller, previously CMO at Satellite Healthcare, joins Fresenius Medical Care's global medical office as SVP Medical Officer for home therapies, supporting their home dialysis care enablement efforts. Source: Healio
Other Details	Duke UNIVERSITY	Duke University researchers studied home dialysis utilization and found persistent racial disparities. Despite increased availability, significant differences in home dialysis rates between White and non-White patients remain. Source: AJMC

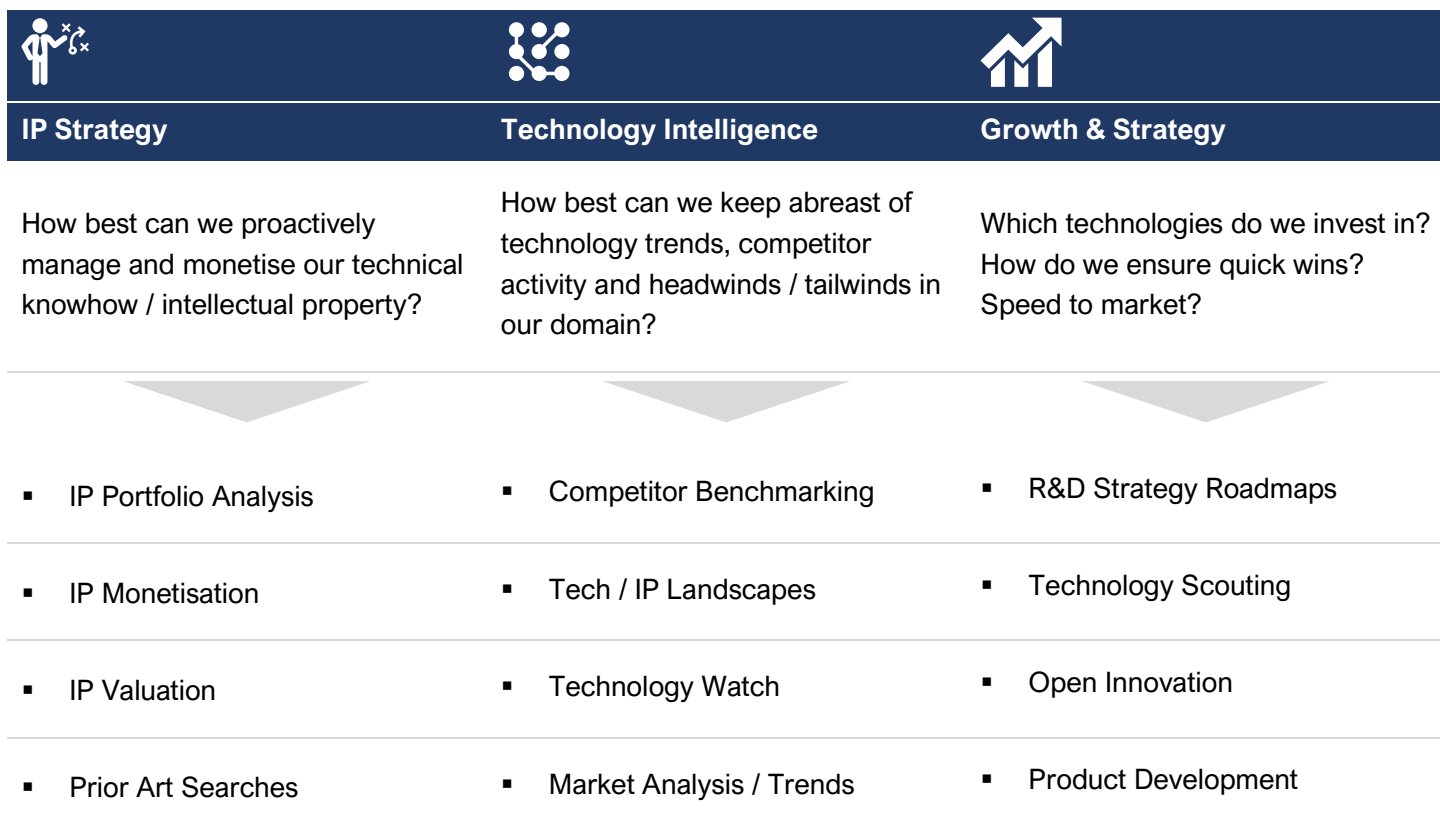


DIVERSIFICATION

VC Investment	NeXtkidney	Nextkidney raised 11.9M EUR in B funding, combining investments from France and The Netherlands with a 4.1M EUR crowdfunding campaign. The funds will support clinical trials and market clearance for Neokidney™, a portable dialysis device for home use. Source: PR News Wire
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VC Investment		The National Kidney Foundation (NKF) has invested in Relavo, a female-founded company, to enhance PeritoneX® technology, making peritoneal dialysis safer and more accessible for patients receiving treatment at home. <i>Source: PR News Wire</i>
VC Investment		Monogram Health has secured \$375 million in funding from investors such as CVS Health, Cigna Ventures, and Humana. The funding will support the expansion of its in-home care delivery model. Monogram Health has raised a total of \$557 million to date. <i>Source: Fierce Healthcare</i>
Grant		Fresenius Kidney Care (FKC) received a grant of over \$130,000 from the Mississippi DOH to enhance home dialysis education in rural Mississippi using virtual reality, improving access and understanding of the benefits of home therapy. <i>Source: PR News Wire</i>
Company Collaboration		Wellsky partners with Dialyze Direct to enhance patient care at home. Hospitals using Wellsky's care management solutions can coordinate with Dialyze Direct for onsite dialysis treatment, reducing readmissions and streamlining care transitions. <i>Source: Business Wire</i>
Crowd Funding		Dutch medtech firm Nextkidney raised €4.1M through crowdfunding on Oneplanetcrowd to launch their portable home hemodialysis device, with support from Generous Minds. <i>Source: Silicon Canals</i>

SOLUTION PORTFOLIO – TECHNOLOGY RESEARCH & ADVISORY



GROWTH ADVISORY	INVESTMENT RESEARCH & ANALYTICS	VALUATION & FINANCIAL ADVISORY	TECHNOLOGY RESEARCH & ADVISORY	PROCUREMENT & SUPPLY CHAIN INTELLIGENCE

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