



The Current State of Personalized Medicine

Keith Batchelder, MD
Genomic Healthcare Strategies
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At GHS



- We view personalized medicine broadly
- We often use the phrase “personalized health and wellness”
- We believe that PM happens outside of
 - Genomics (includes metabolomics, proteomics, etc.)
 - Traditional health care
 - Symptomatic disease
- Includes the whole eco-system of care plus prevention, traditional health care and new players, payors, consumers, and professionals

Current state



- Thus, looking at the current state of PM means looking at a variety of things that are happening
- We're focused completely on PM (broadly defined) and we're confident
 - that a lot is happening and
 - that PM's growth is accelerating
- Some examples follow

Economic



- VC funds focusing on Dx
- Investment in web start-ups
- Investment in point of care technology
- Payors showing interest in targeting therapies through use of Dx
- Companies (employers) showing interest in prevention

Regulatory



- More FDA focus on companion Dx
- FDA interest in Warfarin
- Critical Path Initiative

Consumer



- Increasingly sophisticated and active consumers
 - success of WebMD
- deCode marketing a Dx through DNA Direct
- Interleukin marketing a Dx through Amway
- More home Dx devices
- The Personal Genome Project
- Web Startups
 - Patients Like Me
 - DoubleCheckMD
 - Navigenics
 - Healthvault

Other signs



- Proctor and Gamble \$320M investment in Inverness
- Ventana rebuffing \$3B Roche bid
- McKesson job posting 9/2007
 - Business Analyst for software applications focused on Personalized Medicine and Genomics ... will be integrated into the clinical decision support technologies for caregivers
- Personalized Health Care: Opportunities, Pathways, Resources 9/2007
 - HHS Secretary Leavitt

Isolated events



- These may seem like unrelated events, but we believe that they show a pattern
- This pattern leads us to believe:
 - There's increasing interest and investment in PM
 - For every visible new event, there are ten in the planning stage
 - The science is good enough; it's a matter of turning the crank and reducing costs



The future is already here - it
is just unevenly distributed

— William Gibson, 1999



Look back in three years

Personalized Medicine will be
everywhere



Thanks!

Keith Batchelder, CEO

Genomic Healthcare Strategies

keithb@genomichealthcarestrategies.com

(617) 715-3508