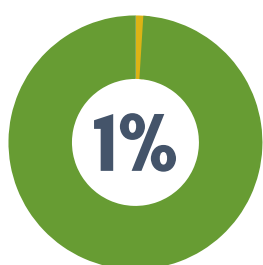


HEALTHCARE DOWNLOAD: THE "ADVANCING AMERICAN KIDNEY HEALTH" INITIATIVE

Chronic kidney disease is a major problem in the U.S.



of the U.S. population lives with ESRD.

750K

Americans are newly diagnosed with ESRD each year.



Chronic kidney disease describes the gradual loss of kidney function. It can progress to end-stage renal disease (ESRD) which is fatal without artificial filtering (dialysis) or a kidney transplant.

The disease is very expensive to treat over time...



1%

of Medicare patients have ESRD...



7%

of Medicare's budget is spent on ESRD care

\$89k

spent by Medicare per patient for dialysis

\$36B

in Total Medicare spend on dialysis

\$8B

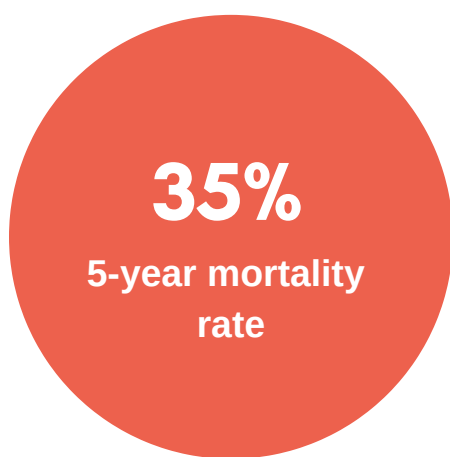
spent by private insurance and patients

And the treatments are not always effective...

Dialysis

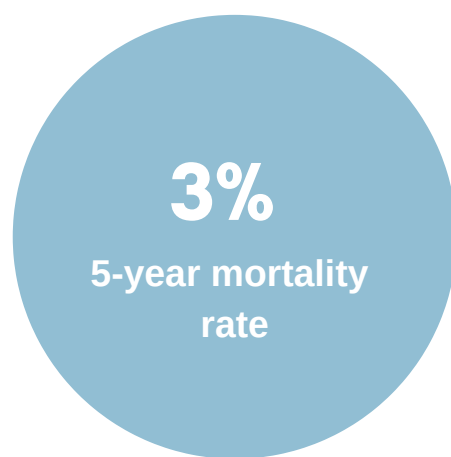


20-25%
annual mortality rate



35%
5-year mortality rate

Transplant



3%
5-year mortality rate

The Trump Administration issued an executive order in July 2019 with the goal of spurring innovation across the industry.



Organ Recovery + Transplants



In-Home Dialysis



New Payment Models



Care Coordination



Artificial Kidney Research



Living Donor Reimbursement

Significant innovation in the space is on the horizon. Opportunities are limitless for providers, payers, biotech, and other industry players alike.