

CKD Care Challenges Define KidneyIntelX Opportunity

Kidney disease is a worldwide public health crisis

The Numbers

37 million
Americans currently estimated with CKD

850 million
people estimated with CKD worldwide

100,000
Americans begin hemodialysis from kidney failure / year

The Healthcare Challenge

~60 million
adults in the U.S. will be diagnosed with diabetes by 2060

100,000
Americans waiting for kidney transplant; 13 die every day

63%
of patients initiate dialysis in an unplanned fashion ("crash")

The Cost

>\$120 billion
or 20% of Medicare budget spent per year for treatment of CKD (incl. ESKD)

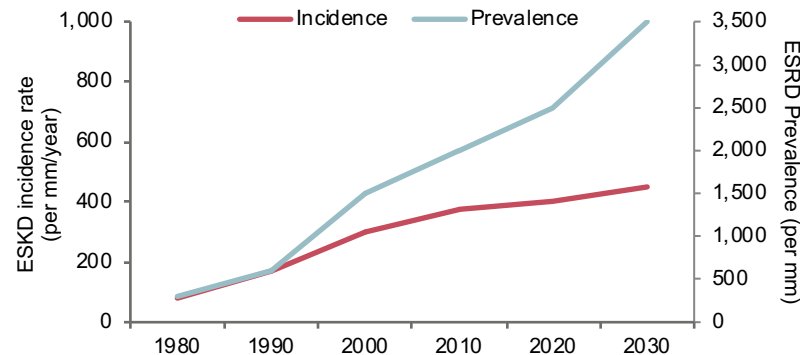
\$36 billion
or 6.7% of Medicare budget spent per year for treatment for kidney failure to care for <1% of the covered population

\$1.3 billion
can be saved over 5 years per 100,000 patients with DKD

Recent events driving new 'war on kidney disease'

- July 2019 Presidential Executive Order sets aggressive goal to reduce patients on dialysis by 2030
- Payor focus on unsustainable health costs from skyrocketing diabetes, obesity and CKD

ESKD incidence rate and prevalence



Source: McCullough, KP, et al. J Am Soc Nephrol. 2019;30:127-135

Overall DKD estimated market opportunity of approximately \$12 billion, assuming one test per patient