

# Diaceutics

## Bridging the Gap

### DGi - The Diaceutics Google index

Vol 15/Circulation 600

We are pleased to bring you "The Diaceutics Google Index" or DGi for the second quarter of 2010.

\* \* \* \* \*

With Personalized Medicine still at an embryonic stage and analysts forecasting 'the death of this and the birth of that' it is sometimes hard to see where the debate is going amidst all the noise. Much as The Economist publishes its yearly "Big Mac Index" to give a populist barometer of currency movement, Diaceutics has similarly decided to apply this simple buzz approach to the noise of Personalized Medicine.

To create our index, we maintain a daily database of the number of times the phrase "Personalized Medicine" is picked up by Google, eliminate any repetition and analyze the content quarterly based on a number of factors to identify patterns and see what catches our eye.

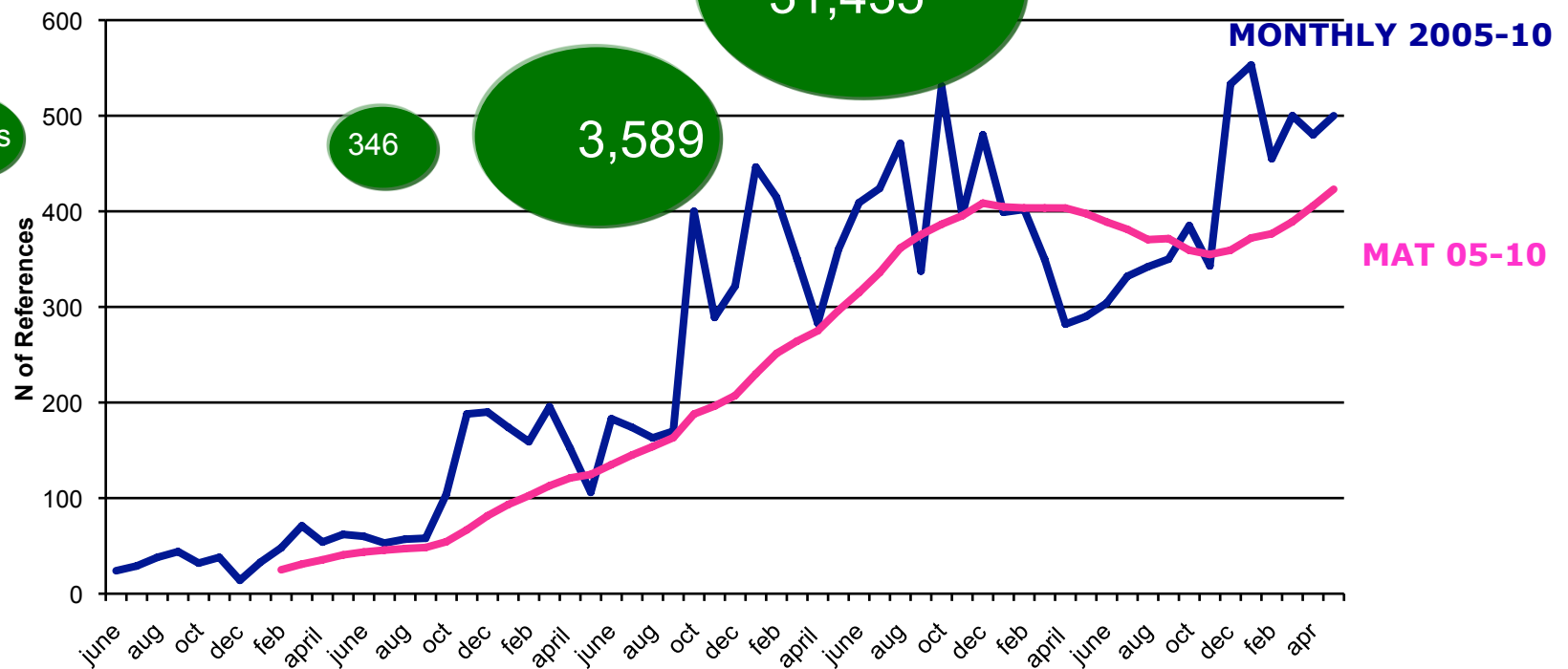
**Peter Keeling and the Diaceutics Team**

# DGi: Buzz Volume (since PM time began . . .)

DGi "personalized medicine" references

2005-2010

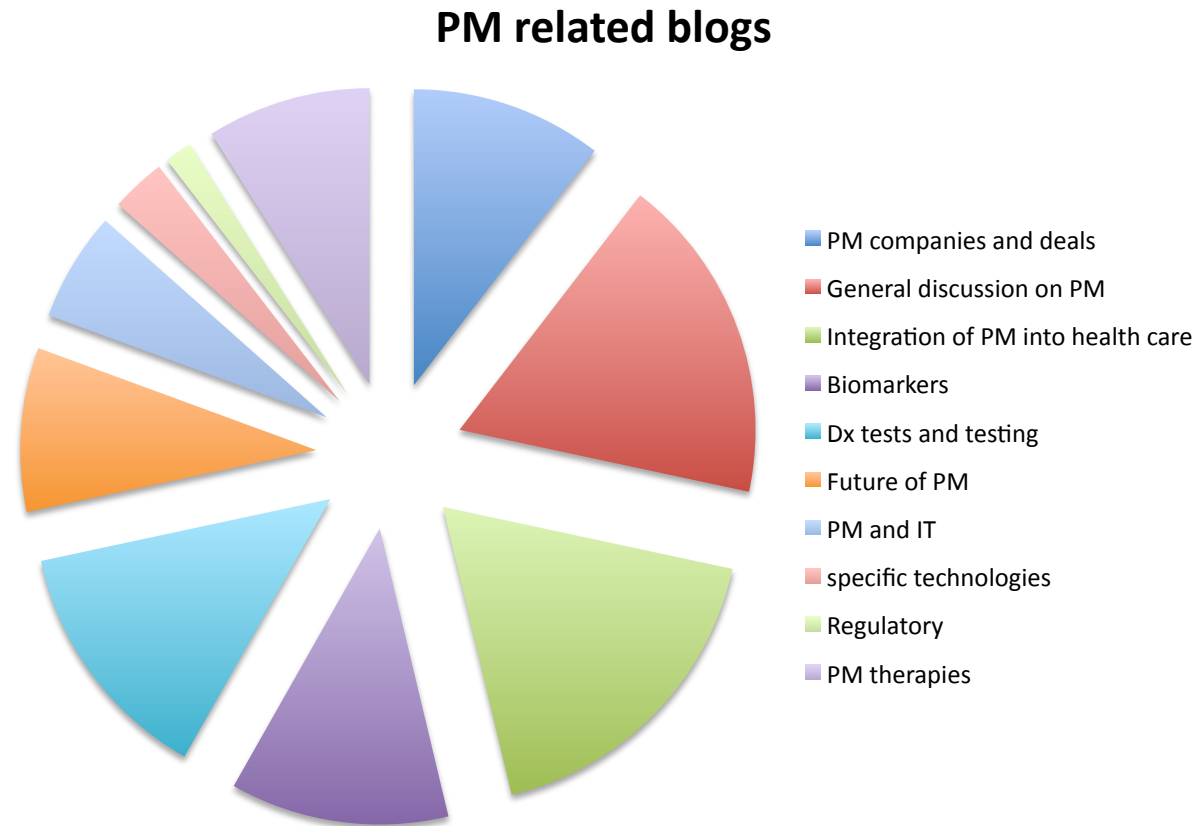
Blogs



2005	2006	2007	2008	2009	2010
------	------	------	------	------	------

Phew! PM recession is over, back into growth!

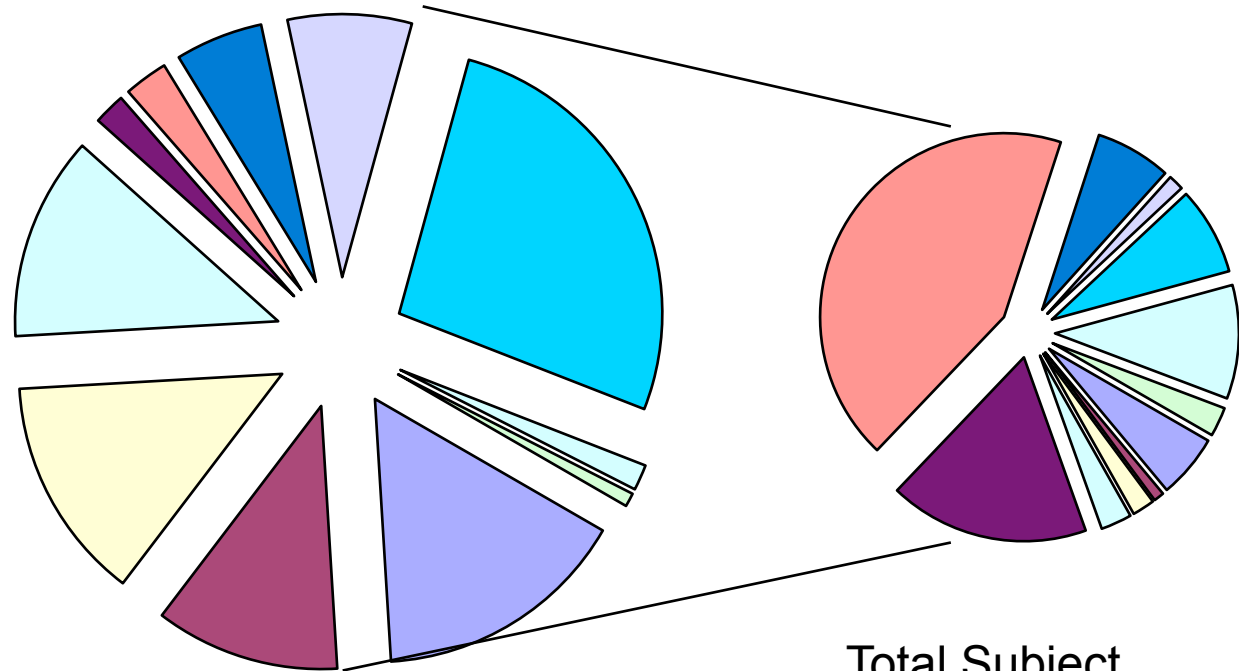
## DGi: Top 10 PM Blog Topics Mar-May 2010



The increasing number of PM Blogs explore the “hot” topics in PM.

# DGi: PM Topic Mix Dec 09-May 10

- Diagnostic Corporations Positioning
- Specific Theranostic Technologies
- PM Analyst Reports/ Conferences
- Provider Groups Positioning
- Business Model
- Patient Management
- FDA and Regulatory
- Rx Products Linked to PM
- PM blogs
- Venture capital
- Pharmacolegal



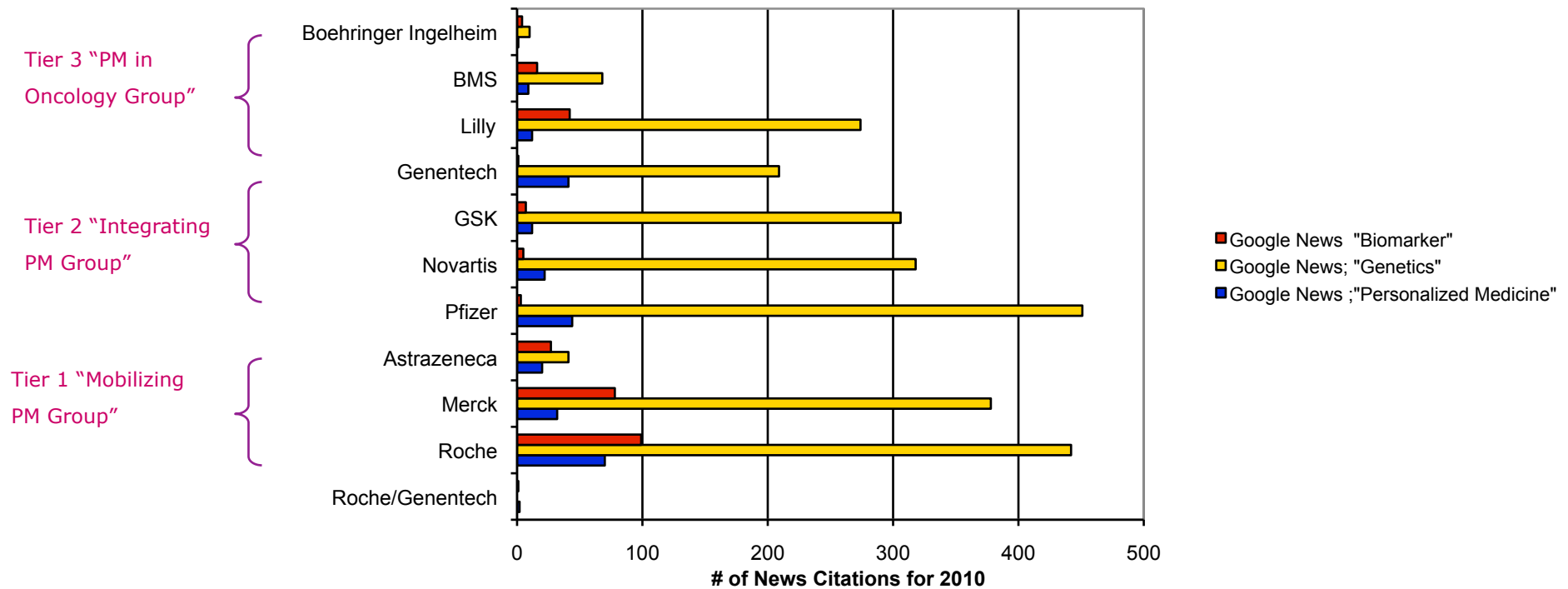
Total Subject Weight

Total Subject Weight  
November Jan-Aug 2009

Subject distribution provides increasing variety and FDA still pushing the envelope of debate!

## DGi: News Wars

### DGi "keyword" citations by competitor Q1 & Q2 2010 (only)



2010 (to date) snapshot suggests our tracking lexicon continues to increase in variety.



## **catching headlines\***

### **IT and Advances in PM**

Bio-IT-world, March 16, 2010: With some supercomputing muscle from IBM, GNS reports early success identifying new targets and therapeutic pathways for arthritis in a partnership with Biogen Idec  
<http://www.bio-itworld.com/issues/2010/mar-apr/pers-med.htm>

### **Biomarker Studies Could Realize Goal of More Effective PM Cancer Medicine**

Scientific American, Apr 26, 2010: Finding individual differences in tumours is key to treating the right patient with the right medicine at the right time, researchers say.

<http://www.scientificamerican.com/article.cfm?id=biomarkers-personalized-cancer-medicine>

### **Almac and Merck to Partner**

GenomeWeb, Apr 12, 2010: The partners will assess potential biomarkers, beyond KRAS, of response to cancer drug cetuximab.

<http://www.genomeweb.com/dxpgx/almac-merck-kгаа-partner-cetuximab-markers>

### **Move Over Pharma**

Genomeweb, April 14, 2010: For Dx shops developing pharmacogenomic tests without big pharma's help, Medco says it can offer a better value proposition when it comes to driving adoption and reimbursement for their tests.

<http://www.genomeweb.com/dxpgx/medco-around-dx-shops-developing-pgx-tests-independently-who-needs-pharma>

### **Eh! Move over Pharma**

FiercePharma, May 19, 2010: The big pharmacy benefits manager is expanding its genetic-testing program, linking the use of more prescription drugs to diagnostic tests.

<http://www.fiercepharma.com/story/medco-digs-deeper-diagnostics-drugs/2010-05-19>

### **Competing Pharmas Race to Pinpoint Markers Beyond KRAS**

GenomeWeb, Apr 21, 2010: After hitting first-to-market opportunities with KRAS, both Merck and Amgen are strategically looking into additional gene markers.

<http://www.genomeweb.com/dxpgx/competing-pharmas-race-pinpoint-markers-beyond-kras-personalized-colorectal-canc>

### **Biomarkers Poised for Breakout Moment**

GEN, May 6, 2010: This explosive new technology niche, which requires the co-development of diagnostics and drugs, has tremendous potential to exploit breakthroughs in the molecular basis of disease..

<http://www.genengnews.com/analysis-and-insight/biomarkers-poised-for-breakout-moment/77899322/>

### **Duke, LabCorp Launch "Factory" to Translate Biomarkers into PM Tests**

GenomeWeb, Apr 28, 2010: The Biomarker Factory, launched earlier in April, combines Duke Uni Medical Center's expertise in biomarker discovery and LabCorp's capacity to develop laboratory developed tests from validated biomarkers.

<http://www.genomeweb.com/dxpgx/duke-labcorp-launch-factory-translate-biomarkers-personalized-medicine-tests>

### **Cost Effectiveness and PM**

The WSJ, May 20, 2010. Britain's new coalition government aims to revamp the country's controversial NICE which rations access to healthcare services based on cost-effectiveness.

[http://online.wsj.com/article/BT-CO-20100520-711209.html?mod=WSJ\\_latestheadlines](http://online.wsj.com/article/BT-CO-20100520-711209.html?mod=WSJ_latestheadlines)

### **Healthcare Costs Under the Microscope of PM**

The OTC Investor, May 24, 2010: The US government has announced they are awarding \$1Bn to small research companies to spur innovations that will reduce the long term growth of healthcare costs.

<http://theotcinvestor.com/health-care-costs-under-the-microscope-of-personalized-medicine-715/>

### **GE Takes Stakes in CardioDx**

Genomeweb, May 13, 2010: GE will work with the molecular diagnostics startup on developing tests for cardiovascular diseases.

<http://www.genomeweb.com/dxpgx/ge-healthcare-takes-stake-cardiodx-forms-mdx-alliance>

### **UK May Yank Pharma's Pricing Power**

FiercePharma, May 25, 2010: UK officials say they are considering a value-based pricing model.

<http://www.fiercepharma.com/story/uk-may-yank-pharmas-pricing-power/2010-05-25>

\* Headlines by Diaceutics



Flying perils, oil and black swans!

It is never pleasant to think of new paradigms in terms of risk management, however the cause and effects of the BP oil spill and the recent eruption of the Eyjafjallajokull volcano remind us that we tend to respond to Black Swan (as Nassim Taleb calls them) events better than to plan for them. However since the spirit of Taleb's book is not to attempt to predict Black Swan Events, but to build robustness against negative ones that occur and the ability to exploit positive ones, it is worth reflecting on what we can learn in our PM world from oil spills and dust clouds.

At a high level we should start with a question: Have we really thought and planned through the risk management consequences of biomarker driven treatment decisions? Put another way, have we thoroughly identified where the future PM blowouts or risks might be across the therapy pipelines?

We note that the fortunes of another pioneering technology, namely electric cars, has enjoyed a considerable boost since oil soaked beaches and birds in the Gulf of Mexico have dominated our TV screens. Indeed car battery companies and electric car component manufacturers have enjoyed between 16-150% hikes in their corporate value since the 30th of April, the fateful blowout day. This type of positive effect from a negative consequence for some might well mirror the increasing fortunes of companies like Genomic Health and Medco. These players are enjoying high corporate value as entirely new intruders into the relationship between doctors and their treatment decisions, and thus benefiting from the slow pace of commercial pharmaceutical participation in shaping the future PM landscape.

We note that Europe's aircraft were grounded by the winds of volcanic dust which dominated the skies between April and June this year. That is until the engine manufacturers and air regulators and the airlines all had to sit round a table and solve very quickly the vexing problem of grounded aircraft and stranded passengers. The positive outcome of this type of cross stakeholder collaboration with the air regulators, might also mirror the potential beneficial outcome of the FDA's recent announcement of their public consultation on the future regulation of lab developed tests in the US.

Ah well, you may say, but these are consequences of a very slow evolution of science not a single Black Swan event. Perhaps, unless we have already seen the PM Black Swan event (maybe the lost value of Herceptin as the proper test continues to be sought) but do not yet recognize it as such.