KOMPASSIUM

The Always Preliminary Longevity Innovations Report(health)

A Living Document Partof the Longevity Reach Partners Ecosystem

Version 1.0 | 18.December.2025

If you want to go beyond the average, you will need to soon disrupt the traditional ways of doing business, bringing innovative hands-on experience with track records of turning challenges into opportunities to drive operational efficiency, manage innovation, and accelerate growth from wherever it may come.

Experience-based | Execution-focused | Global perspectives

The 36 of KOMPASSIUM

With a track record of execution in multiple countries, we bring deep market knowledge and practical solutions...

...to apply innovative approaches to drive growth and make innovationa reach more people. Faster.

Legal entities
- Brazil
- Germany

35 Partners and lead advisors
- Canada
- China
- Colombia
- France
- India
- Italy
- Lithuania
- Portugal
- South Africa
- Spain
- Switzerland
- USA

Expandable partnerships
- Argentina
- Australia
- Chile
- Japan
- Mexico
- Monaco
- Nigeria
- Saudi Arabia
- Singapore
- UAE
- UK

we are doers, not sayers

This meeting is **being recorded** and will be transcribed and shared entirely or partially. Although everyone's contribution is very important, your participation via video or audio is optional, or you can make comments and ask questions via chat or by email or WhatsApp afterwards.

Reports and Presentations

1. First report + Open Discussion: Dec.18th 2025
2. Final report (First report with discussion adjustments): Dec 21st 2025

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The Always Preliminary Longevity Innovations

Our journey starts today, but...

...we will continuously improve this report quarterly in 2026.

What We Have Heard From You:

Longevity Reach Partners: There are questions about what it is and how it will work.

Systemic barriers and metrics: A key question revolves around the primary systemic failure limiting progress in longevity and identifying the most credible metric for defining success in longevity initiatives.

Behavior and lifestyle change: There is interest in strategies to promote actions for lifestyle changes, how to truly engage people to transform their lives, and the best tools to reach the largest number of people.

Vulnerable populations: Concern was raised about the best strategy for dealing with vulnerable aged people living alone.

Individual agency: A question was posed regarding the most significant threat to individual agency as health systems increasingly become data-driven.

Longevity Innovations

2025

Trends & Outlooks

2026

The Longevity Inflection Point

> The changing consumer behaviour and the enabling technologies that are converging AI, precision medicine, cellular therapies, and digital health infrastructure are creating a new paradigm for longevity health innovations.

The Challenge

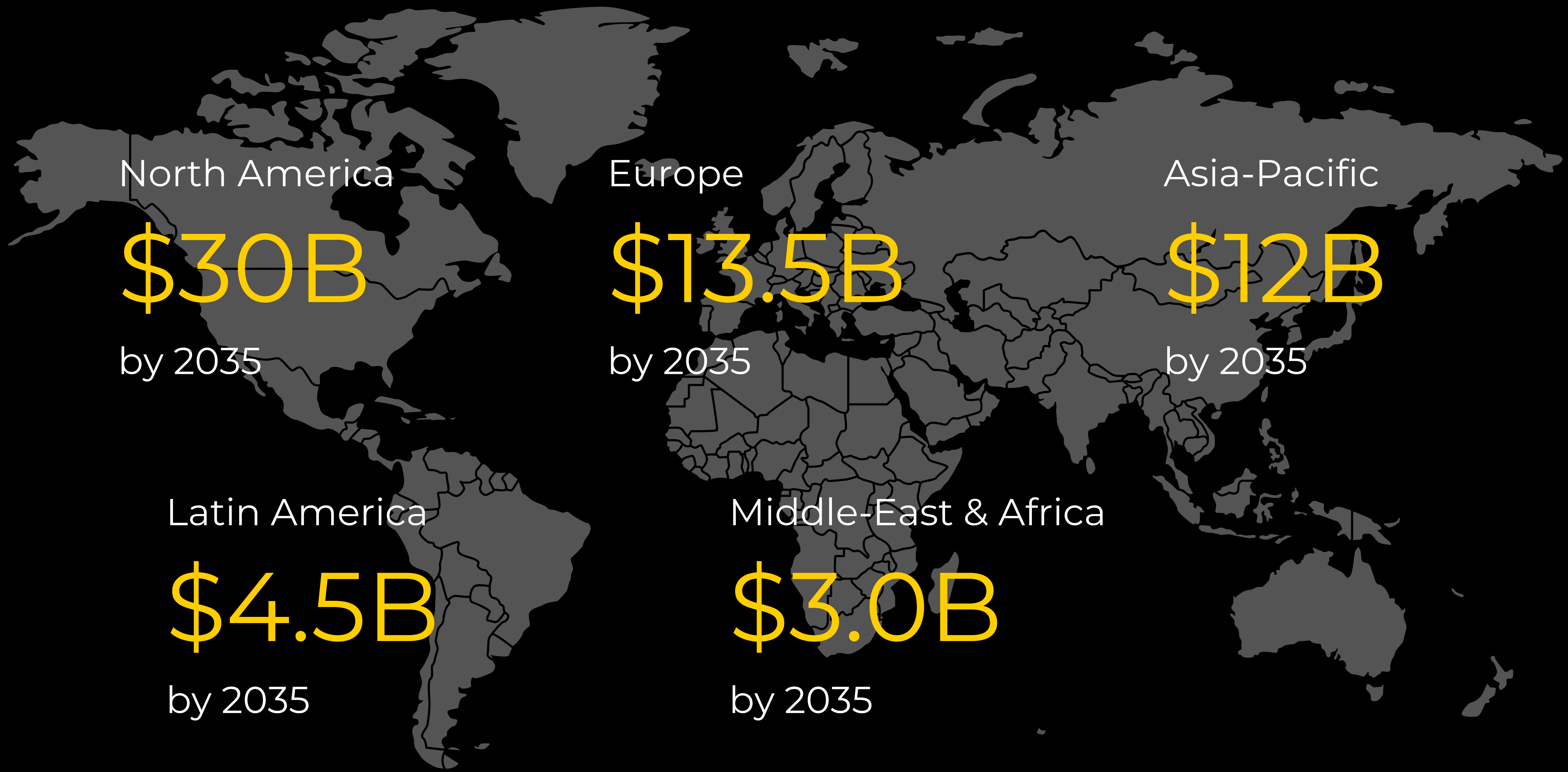
Despite remarkable technological innovation, the industry faces a critical challenge: a healthcare commercialisation and distribution gap, and an adoption speed that does not keep pace with innovation.

The Opportunity

Companies that successfully navigate regulatory pathways, secure reimbursement, and build distribution networks will drive adoption at scale, stay longer, and define the future.

This is where KOMPASSIUM's **Longevity Reach Partners** ecosystem creates value.

Global Market Growth = $21B to $63B | 10.37% CAGR



Source: Market size & CAGR: Market Research Future (MRFR): global market $21.29B (2024) → $63.0B (2035), CAGR 10.37%. Regional breakdown (values above): MRFR regional insights table (North America, Europe, APAC, South America, MEA). Corroboration of totals: Syndicated release echoing MRFR figures ($21.29B 2024 → $63.0B 2035; 10.37% CAGR).

Innovators

The Fundraising Shift
Capital is moving toward lighter tech—AI-based software and digital therapeutics—and away from deeptech hardware and cellular therapies. Fundraising timelines for hardware-intensive innovations are extending.

Regulatory Navigation
Innovators struggle to find commercial partners who understand both the science and the regulatory complexity. ”*We need more than distributors, we need strategic partners*”, said a vice president of a IVD company.

Global Expansion
Challenge to find commercial partners to develop long-term growth roadmaps, demanding time and resources without eliminating high risks in each non-traditional markets.

Distributors

The Longevity Fog (Part 1)
Take the risk vs staying in the traditional healthcare approach?

What Do They Seek?

- Ventures that can "live longer" (sustainability)
- Economic models that work in real healthcare systems
- Technologies ready for distribution
- Clear value proposition for payers and providers

Investors

The Longevity Fog (Part 2)
Difficulty distinguishing truly differentiated ventures from the flood of similar-sounding longevity plays—the challenge: separating science-backed innovations from hype.

What Do They Seek?

- Clear differentiation beyond "AI + longevity"
- Path to regulatory approval and reimbursement
- Proven clinical or commercial traction
- Team with both scientific and commercial expertise

The solution:
Strengthen due diligence and scouting. Rigorous due diligence frameworks that separate genuine innovation from noise and founders from quick “exiters”

Wearables & Continuous Monitoring

$67B

Global wearables market 2025

Sophisticated Continuous Monitoring

Beyond step counting—wearables now track HRV, sleep stages, stress levels, glucose, and provide AI-powered health insights.

Oura
The company that moved the hype from watches to rings as biometrics analyser ahead of large Tech companies

Eaglenos
Swiss-based startup willing to challenge larger players in CGM and Handheld Monitors

Lumina Salud
Spanish pre-seed startup integrating GLP1 medication, wearables and AI-powered personalisation.

The Complete Ecosystem: From Sensors Battle to Preventive Focus

Integration with remote consultation platforms creates comprehensive longevity management systems

CGMs note

A revolution that started with two $10B-dollar players (Dexcom and FreeStyle Libre) are accessible by a growing number of new ventures

Wearables transitioning from fitness trackers to medical-grade diagnostics

AI in Diagnostics

1,250+

FDA-cleared AI medical devices (late 2025)

From Research to Clinical Reality

AI diagnostics are no longer emerging—they're a mature market. The focus for 2026 is on adoption, balance the use versus medical experience and requirements (clinical integration) and reimbursement.

Haut.AI
Advanced AI for skin analysis with personalized longevity recommendations

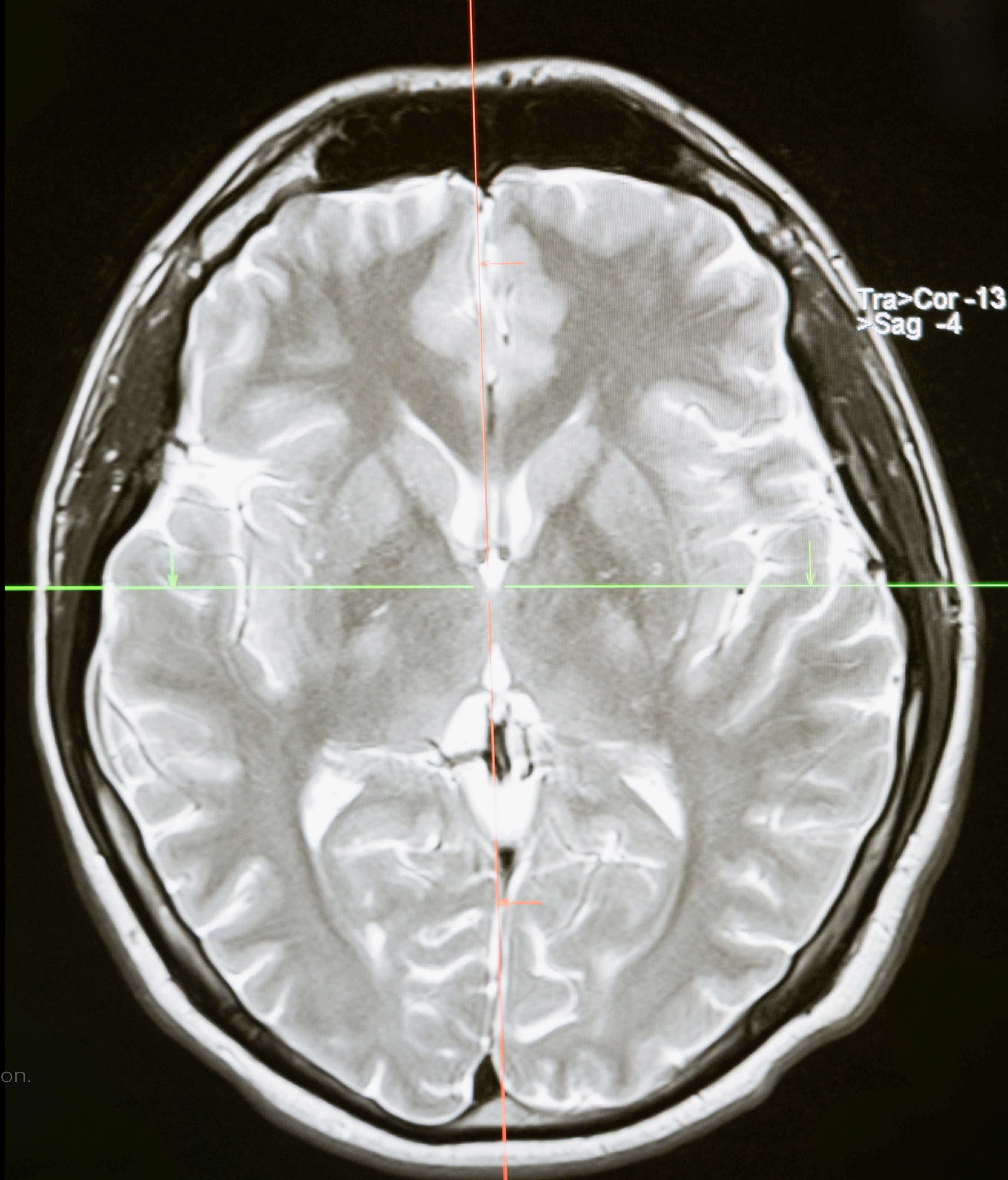
HeartFlow
FDA-cleared AI platform for coronary artery disease diagnosis

Traditional Players
All traditional Diagnostic Imaging players claim to have adopted AI to improve outcomes

Beyond Traditional Players

AI and hardware improvement are also enabled the fast development of tailored solution, such as Swiss dementia-dedicated PET Scan (Positrigo)

AI diagnostic systems transitioning from approval to adoption phase



Precision Medicine & Biomakers

Biological Age Testing: From Research to Clinical

Epigenetic clocks and multi-omic biomarkers transitioning from research tools to mainstream diagnostic methods

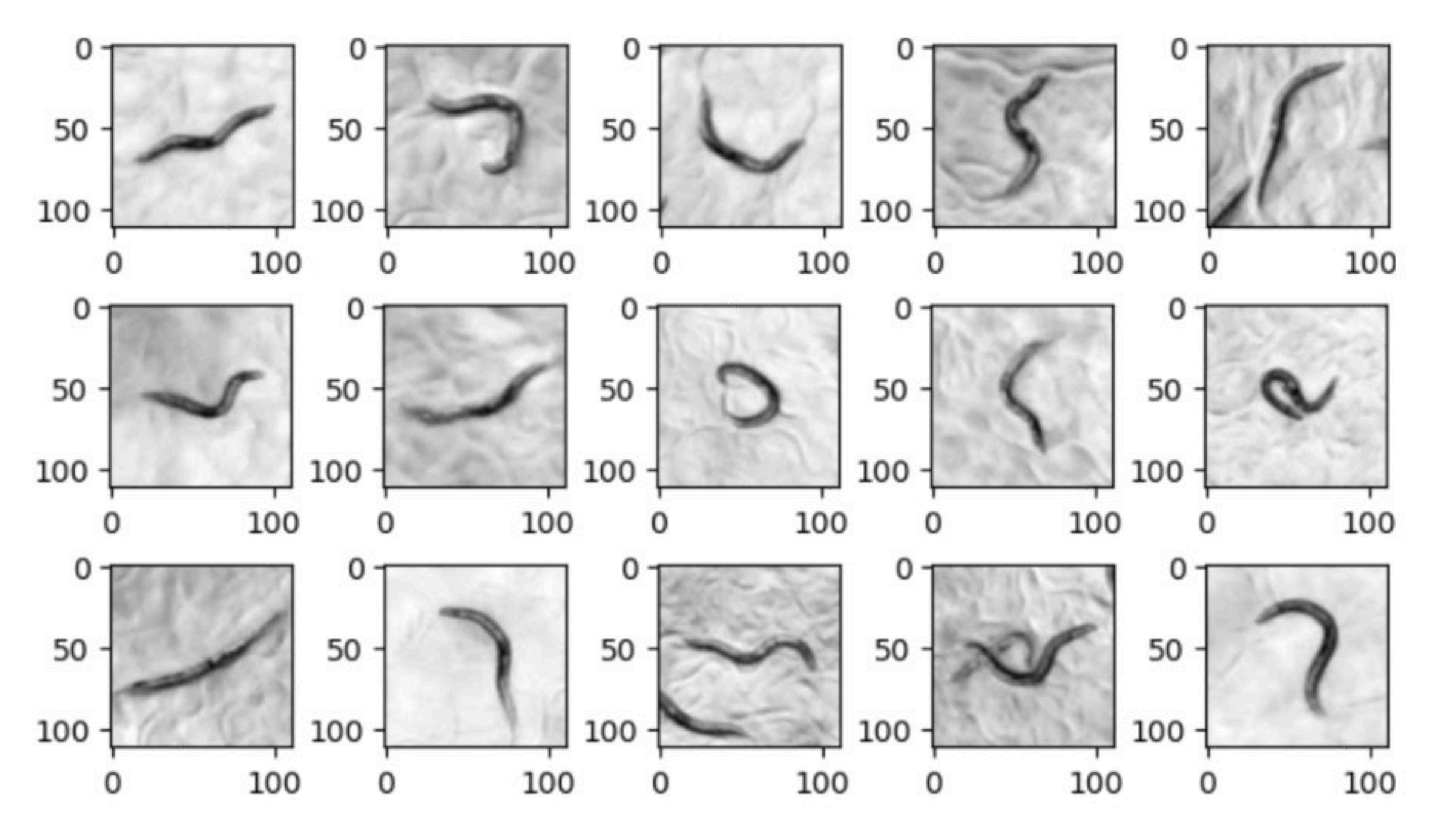
Market Implications

Biomarker testing becoming standard of care creates massive opportunity for diagnostic distribution and integration with preventive care platforms

TruDiagnostic
Epigenetic testing for clinical and research applications, DTC market leader

Noura Health
A Seed-Stage startup based out of Ohio, USA, working on personalised nutrition based on DNA and ancestry specific characteristics

Sydra
Utilizing a state-of-the-art closed loop discovery platform, SYDRA blends advanced Artificial Neural Networks (ANN) with an autonomous robotic in vivo screening



Credits: Sydra Synthetic Drug Algorithms www.sydra.bio

Biological age testing market expected to reach $3.2B by 2030

Cellular Therapies

Targeting Fundamental Aging Mechanisms

Moving beyond symptoms to address root causes of aging at the cellular level

Senolytic Therapies
Target senescent "zombie cells" that have stopped dividing but don't die, having multiple compounds in Phase 2 trials.

Gene Editing
CRISPR applications for age-related diseases.
Long regulatory path.

NAD+ Metabolism
NAD+ (nicotinamide adenine dinucleotide) is a critical molecule involved in cellular metabolism and energy productio

Senolytic Therapies
Unity Biotechnology is a promising clinical-stage company, while Novarts is the major giant involved in this area. Important players are Life Biosciences (shifting to Epigenetic Reprogramming).

Cellular Reprogramming
Altos Labs: $3B funding.
Partial reprogramming to rejuvenate cells without losing identity.
5-10 year horizon but potentially transformative.

NAD+ Metabolism
Clinical evidence building. Growing Direct-to-Consumers with multiple companies developing therapies to restore NAD+ levels or enhance NAD+ dependent pathways.

2026-2027: First senolytic approvals for specific age-related diseases expected.
Cellular therapies represent the frontier of longevity science with varied commercialization timelines

Personalised Cancer Vaccines

Where precision medicine meets immunotherapy

Genomic sequencing identifies tumor-specific mutations (neoantigens) → patient-specific vaccines train immune system to attack cancer cells

Market Implications

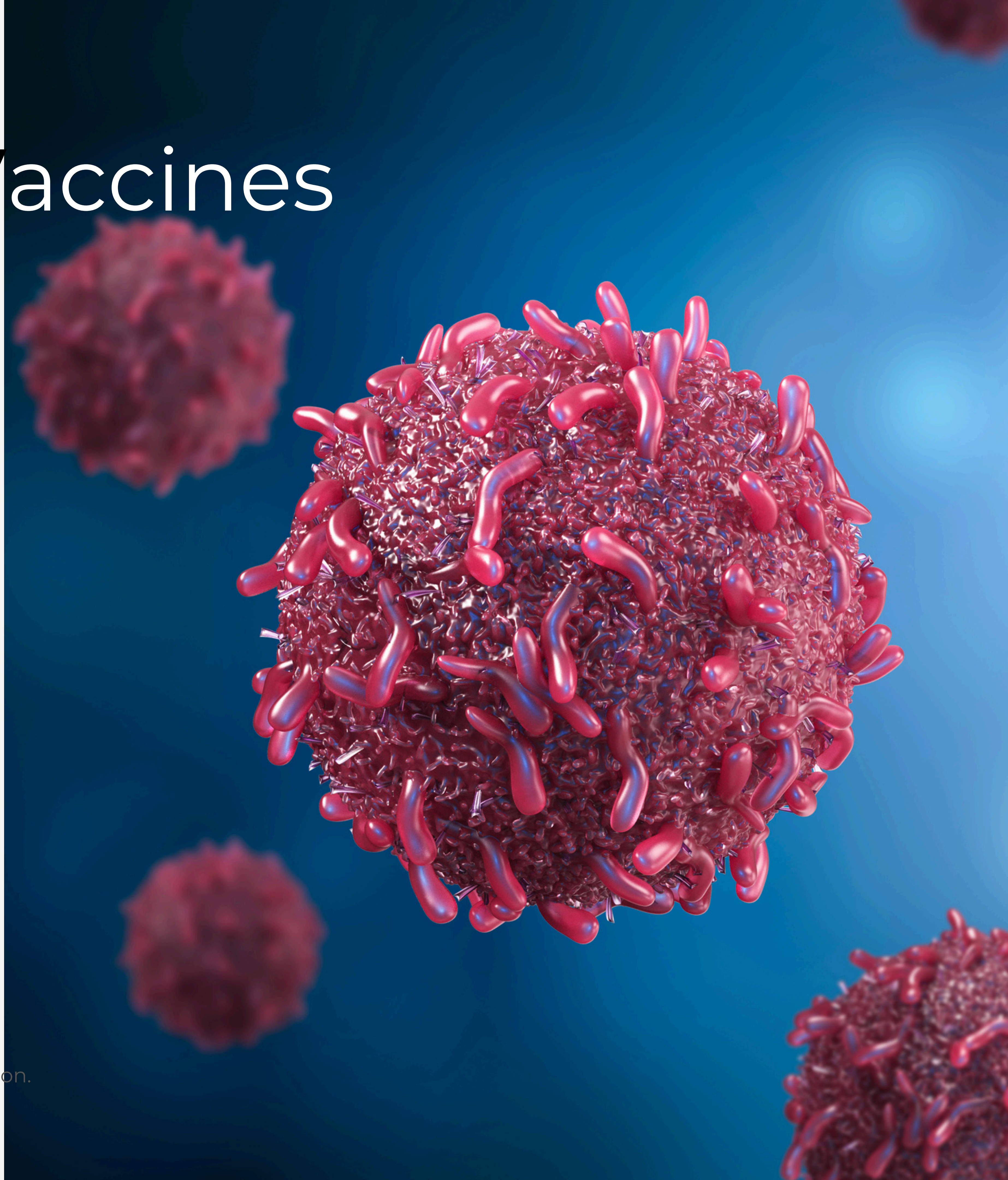
Post-COVID validation of mRNA attracting investment. Genomic sequencing gaining strategic importance.
However decentralised manufacturing models remain the opportunity to allow cost reduction and greater adoption

BioNTech
mRNA-based personalised cancer vaccines. Phase 2 trials in melanoma, pancreatic and colorectal cancers

Gritstone bio
AI-driven neoantigen identification with ML predicting strongest immune responses

CeGaT
Specialised in helping find the genetic causes of rare diseases and best therapy combination for cancer patients and with an updated panel for neurodegenerativ diseases

Convergence accelerators: Genomics + AI + Immunotherapy model spreads to other age-related diseases



Digital Health Infrastructure

The Integration Imperative

Standalone solutions are less valuable than integrated platforms combining diagnostics, monitoring, AI analysis, and expert guidance

Virtual Hospitals
Remote patient monitoring, telehealth integration, AI triage systems enabling preventive care at scale

Full-Body Screening
NEKO Health, Prenuvo, Ezra leading preventive diagnostics. Early disease detection when most treatable

Digitally-Integrated Programs: TechBalance Case
Motion monitoring + personalized AI exercise programs. Integrated with health insurance and corporate wellness. Proven clinical outcomes and ROI. Important peer-support in some conditions.

Digital health infrastructure enabling the shift from reactive to preventive medicine

Key Trends Driving Growth & Challenges

Trends Driving Growth

AI Acceleration
Remote patient monitoring, telehealth integration, AI triage systems enabling preventive care at scale

Consumer Awareness
Mainstream acceptance growing. Longevity no longer fringe—it's preventive healthcare

Preventive Shift
Healthcare moving from reactive treatment to preventive optimization. Wearables + biomarkers enabling early intervention & ease self-monitoring

Integration Imperative
Standalone products less valuable. Platform plays combining multiple modalities winning

Regulatory Clarity
FDA pathways for aging interventions becoming clearer. More approvals expected 2026+

Economic Validation
Payers recognising ROI of preventive interventions. Reimbursement models evolving

What to Watch

- Ongoing senolytic trial results
- Insilico Medicine Phase 2 initiations
- NEKO International expansion
- Biological age test insurance coverage
- AI diagnostic adoption by medical societies
- Expanded research use of Quantum Computing
- M&A Activity from traditional players
- Evolving VC longevity-focused such WHC

EU Megatrends
- Electric Medicine & Bioelectronic
- SleepTech & Sleep Optimisation
- Ambient Clinical Intelligence
- Dynamic Health Data Consent
- Regenerative Medicine

United States Digital Health
- Digital Health Empowerment
- AI Scaling
- Cross-Industry Collaboration
- Consumer Empowerment

China Beyond Medical Devices
- Precision Medicine
- Genomic Sequencing
- Personalised treatment planning

Japan, Aging as National Priority
- Robotics for Elderly Care
- Remote Monitoring Systems
- AI-Powered Diagnostics

What to Avoid (AKA: Challenges)

Most longevity innovations fail not because of bad science, but because of lacking long-term (and adaptable) commercialisation strategy

THE GAP

Regulatory expertise, payer relationships, distribution networks, clinical workflow integration, reimbursement strategy

THE SOLUTION

Strategic partnerships balancing tech expertise and healthcare experience to drive and implement growth roadmaps

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