

Stream Healthcare Recap

Expert insights that bring meaning to trending healthcare topics and upcoming events

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by Sara Mallatt Stahl, Stream Healthcare Sector Head

Stream in AlphaSense has an ever-growing expert call library offering a range of industry perspectives. For healthcare fans, look no further for a March 2023 recap of expert call transcripts that provoke deeper insights on trending healthcare topics, upcoming events, and market movers. You'll find a sneak peek of these expert call transcripts below, but you can gain full access with a [free trial of AlphaSense](#).

Top-Rated Transcripts

A selection of Stream expert call transcripts that are particularly insightful, thought-provoking or unique.

Biotech/Pharma	UCB-BB	Former VP Believes Replenishing the Pipeline Will Be A Challenge For UCB-BB - Former Vice President, Global Head of Patient Experience and Technology Practice at UCB SA
	GSK	Nephrologist Sees Challenges Ahead for GSK's Daprodustat Following Its Limited FDA Approval - Nephrologist who treats patients, manages dialysis units, and is a professor at Yale Medicine
Healthcare Technology	AMZN	Physician With a Concierge Medical Practice Has Doubts About Whether AMZN Clinic Is Really Meeting a Demand - CEO and Chief Medical Officer, Founder and Clinician at Empowered Health Concierge Medicine Group
Life Sciences Tools	PACB	Former Director Is Increasingly Bullish on PACB but Acknowledges Taking Share From ILMN Will Be a Challenge - Former Director, Business Development at Pacific Biosciences of California
MedTech	JNJ	Former Commercial Vice President Believes Development of a Surgical Robot Is Crucial to the Future of JNJ's Ethicon - Former Vice President, Commercial - Oncology, Cardiovascular, Bariatric, Transplant, Neurosurgery at Johnson & Johnson MedTech

Trending Topics

Stream expert call transcripts that provide context to important industry topics.

Medicare Advantage (MA)

The proposed 2024 MA rates released by the Centers for Medicare & Medicaid Services in early February were well below investor expectations. Nevertheless, Stream experts interviewed since then have expressed relatively positive outlooks on MA enrollment.

"If the [MA] plans simply pass on the premium increases and hold benefits steady, I don't foresee a number of people choosing to go back to traditional Medicare. Human beings don't really like to change." - [Former Senior Director of Medical Cost Strategy & Management at Humana Inc.](#)

Artificial Intelligence (AI)

With AI buzz seemingly everywhere, Stream's expert transcript library offers deep insights into how healthcare companies across a range of sectors are incorporating AI into their business models.

"CVS, for example, has brought in a lot of folks from Google, McKinsey, Boston Consulting Group... and the idea is to level up on [their] digital analytics capabilities. In that measure, I felt AbbVie was two steps behind in both recognizing that [AI] talent is necessary, and second, being able to execute on bringing that talent in." - [Senior Manager, Commercial Strategy & AI/ML at AbbVie Inc.](#)

Recent FDA Drug Approval Decisions

Stream interviews conducted prior to recent FDA approvals for **APLS**, **RETA**, **TVTX** - and a decision extension for **ALPMY** - provide insight into physicians' anticipated use of these drugs. Here's a sampling:

- [Ophthalmologist Thinks Use of APLS' Pegcetacoplan Will Be ~30-40% of Patients With GA When It Gets Approved](#) - Retina Specialist at the University of Pennsylvania
- [Neurologist Wants FDA to Approve RETA's Omaveloxolone for Friedreich's Ataxia and Would Incorporate It Into Practice](#) - Neurologist at the University of Louisville
- [Nephrologist Is Positive on TVTX's Sparsentan and Believes It Will Be Adopted Immediately for IgA Nephropathy Patients](#) - Nephrologist at Montefiore Medical Center
- [OBGYN Believes There Is Great Potential for ALPMY's Fezolinetant as a Non-Hormonal Option for Women With Menopause](#) - OBGYN at Southern Connecticut Women's HealthCare Associates

Pulsed Field Ablation (PFA)

MDT's March 6th presentation of better-than-expected study results for its PulseSelect PFA system supports Stream experts' optimistic outlooks for the emerging technology, which is also being developed by **ABT, AFIB, BSX** and **JNJ**.

"In my opinion... in the next three or four years, PFA [will] take [over] the market nearly completely." - [Consultant and interventional rhythmologist with Mater Private Hospital in Dublin](#)

Non-opioid Pain Medications

LLY's recent licensing of an early-stage non-opioid pain candidate has brought non-opioid pain therapies into further focus. **VRTX's** VX-548 non-opioid therapy has made the most progress in its development process, and Stream experts have expressed positive opinions about the drug's study data as well as its market potential.

"The pain medications available to us [today] increase the risk of falling [after orthopedic surgery]... because [patients are] on a bunch of gabapentin and oxycodone... If a drug company could demonstrate effective pain control with [fewer] side effects... less addiction, less falls... the whole world's [going to be] using it." - [Anesthesiologist and Pain Medicine Specialist practicing within an orthopedic center](#)

Coming Up

Stream expert call transcripts to help prepare for upcoming events.

Anticipated FDA Approval Decisions

CDTX
3/22

CDTX's rezafungin for serious fungal infections. The outlook for rezafungin was quite upbeat in both [this interview](#) and [this interview](#) with infectious disease specialists.

EBS
3/29

EBS's Narcan nasal spray for opioid overdose. [This interview](#) with an anesthesiologist and addiction specialist provides an in-depth review of addiction treatments, including Narcan.

About AlphaSense

Stream in AlphaSense is a searchable database of investor-led expert interviews based on one-on-one calls with former executives, customers, competitors, and channel participants across a breadth of industries. With our proprietary AI search technology, we help the leading financial institutions and corporations get up to speed about a company or topic in seconds.

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