

# Stream Healthcare Recap

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

## March 2023

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

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## 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.

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## 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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