

# Monthly Healthcare Megatrend Market Report

December 2021

HANetf & GinsGlobal  
 HAN-GINS Indxx Healthcare Megatrend Equal Weight UCITS ETF  
 WELL  
 59bps  
 IE00BJQTJ848  
 Product Inception Date: 04/04/2019

For Professional Clients Only. Capital at risk.

All data as of 30.11.21

This report was written by, and is the opinion of, the WELL Fund Partner, GinsGlobal

## Key Takeaways

- Digital Healthcare expecting further influx of Big Tech deals – following latest Oracle \$30bn Cerner electronic data deal. (Source: <https://www.ft.com/content/9bf80646-fdfb-44ff-ab51-7a4236091afa>)
- US Healthcare ripe for Tech upgrade, with healthcare ~20% of GDP. (Source <https://www.cms.gov/Research-Statistics-Data-and-Systems/Statistics-Trends-and-Reports/NationalHealthExpendData/NationalHealthAccountsHistorical>)
- Global DNA sequencing market size to hit ~\$40bn by 2030 just \$8.4bn currently.<sup>1</sup>
- Top monthly contributors across multiple themes – led by Healthcare Trackers up 16.6 due to iRhythm.<sup>2</sup>
- Ten subthemes, Equal Weight across all 104 current holdings.<sup>2</sup>
- Largest subtheme exposure - Medical Devices (26.6%), Biotech (26.0%), Gene Sequencing (19.0%), Neuroscience (9.5%), Healthcare Analytics (5.6%) and Telemedicine (5.4%).<sup>2</sup>
- Increasingly global – with the US at 69.6%, Japan 8.4%, China 3.8% and Europe 14.1%. (Source; HANetf November Fact Sheet - WELL)

Past performance is not an indicator for future results and should not be the sole factor of consideration when selecting a product. Please note that all performance figures are showing net data.

## Macro Outlook

- Digital Healthcare space is experiencing an influx of Big Tech deals. The US Healthcare industry is ripe for Tech upgrades, with healthcare representing almost 20% of US GDP. (Source: <https://www.cms.gov/Research-Statistics-Data-and-Systems/Statistics-Trends-and-Reports/NationalHealthExpendData/NationalHealthAccountsHistorical>)
- Digital Health estimated at \$152.5bn in 2020, projected to reach a revised size of US\$456.9bn by 2026 - CAGR of 18.8% annually<sup>2</sup>
- Telemedicine continues fast uptake and favourable consumer perception – telehealth uses up 38 fold from pre COVID levels.<sup>3</sup>
- In US ~\$250bn or 20% of all health spend could be virtualised.<sup>3</sup>
- Telemedicine subtheme surpassed \$60.9bn in 2020 - estimated to grow at 18.2% between 2021 and 2027. Increasing prevalence of chronic disease and growing need for patient management (Source: [Telemedicine Market Size & Share, Growth Outlook 2021-2027 \(gminsights.com\)](#))
- North America dominates Telemedicine – at approximately double the size of Europe and 6 times larger than Asia-Pacific. (Source: [Telemedicine Market Size & Share, Growth Outlook 2021-2027 \(gminsights.com\)](#))

<sup>1</sup><https://www.globenewswire.com/en/news-release/2021/02/24/2181661/0/en/DNA-Sequencing-Market-Size-to-Hit-Around-US-40-64-Bn-by-2030.html>

<sup>2</sup> Source: INDXX. Data as of 30.11.2021

<sup>3</sup> <https://www.mckinsey.com/industries/healthcare-systems-and-services/our-insights/telehealth-a-quarter-trillion-dollar-post-covid-19-reality>

- North America dominates Telemedicine – approximately double the size of Europe and 6 times larger than Asia-Pacific.<sup>4</sup>
- Global DNA sequencing market size to hit ~\$40bn by 2030, just \$8.4bn currently.<sup>5</sup>
- Rapid advancements in sequencing technology and bioinformatics – enabling the identification of DNA variations.<sup>6</sup>

Top Contributors Sub-Themes	Contribution to Return	
	YTD	November
Telemedicine	-39.10%	-23.01%
Genome Sequencing	-20.06%	-15.27%
Medical Devices	9.60%	-6.90%
Neuroscience	26.04%	-6.31%
Bioinformatics	-28.95%	-20.92%
Biological Engineering	-6.92%	-6.79%
Healthcare Analytics	-19.95%	-18.00%
Robotics	-57.19%	-8.68%
Healthcare Trackers	-49.09%	16.63%

Past performance is no guarantee of future performance. Please note that all performance figures are showing net data. Source: INDXX. Data as of 30.11.2021

Company Name	Sub-Themes	November (Contribution to Return)
IRHYTHM TECHNOLOGIES INC	Healthcare Trackers	25.28%
OMEROS CORP	Neuroscience	1.48%
JMDC INC	Healthcare Analytics	1.21%
MEDPEER INC	Telemedicine	0.70%
ACADIA PHARMACEUTICALS INC	Neuroscience	0.70%
ALNYLAM PHARMACEUTICALS INC	Biological Engineering	0.61%
QUIDEL CORP	Biological Engineering	0.45%
BIOMERIEUX	Biological Engineering	0.43%
BIOMARIN PHARMACEUTICAL INC	Biological Engineering	0.36%
PEPTIDREAM INC	Biological Engineering	0.18%

<sup>4</sup> Telemedicine Market Size & Share, Growth Outlook 2021-2027 (gminsights.com)

<sup>5</sup> <https://www.globenewswire.com/en/news-release/2021/02/24/2181661/0/en/DNA-Sequencing-Market-Size-to-Hit-Around-US-40-64-Bn-by-2030.html>

<sup>6</sup> <https://www.grandviewresearch.com/industry-analysis/dna-sequencing-market>

<sup>7</sup> <https://www.businesswire.com/news/home/20200130005458/en/Global-Healthcare-Cloud-Computing-Market-2020-2024-Introduction-of-Blockchain-in-Cloud-Computing-to-Boost-the-Market-Growth-Technavio>

**HAN-GINS Indxx Healthcare Innovation UCITS ETF – Performance**

As of 30.11.21

	1M	3M	6M	YTD	12M	2Y	3Y	SI
<b>HAN-GINS Indxx Healthcare Megatrend</b>	-9.53%	-13.38%	-7.27%	-7.90%	-2.33%	18.69%	NA	30.84%
<i>Indxx Global NextGen Healthcare Index (NTR)</i>	-9.44%	-13.45%	-7.34%	-7.87%	-2.27%	19.65%	37.68%	32.60%

Past performance for the index is in USD. Past performance is not an indicator for future results and should not be the sole factor of consideration when selecting a product. Investors should read the prospectus of the Issuer (“Prospectus”) before investing and should refer to the section of the Prospectus entitled ‘Risk Factors’ for further details of risks associated with an investment in this product. Source: Bloomberg / HANetf. Data as of 30/11/2021. **Please note that all performance figures are showing net data.**

**Product Details**

HAN-GINS Indxx Healthcare Megatrend UCITS ETF (WELL) is a UCITS compliant Exchange Traded Fund domiciled in Ireland. WELL tracks the Indxx Global NextGen Healthcare Index (Net Total Return), an index designed to measure the performance of large, mid and small-capitalisation companies primarily listed on an exchange in Developed and Emerging Markets that are involved in the Advanced Life Sciences & Smart Healthcare sector.

Please remember that the value of your investment may go down as well as up and past performance is no indication of future performance. Visit the [WELL Fund Page](#) for more information.

Exchange	BBG Code	RIC	ISIN	Valoren	SEDOL	Currency	TER
London Stock Exchange	WELL LN	HAWELL.L	IE00BJQTJ848	-	BJVBGL7	USD	0.59%
London Stock Exchange	WELP LN	WELP.L	IE00BJQTJ848	-	BJVBGM8	GBP	0.59%
Borsa Italiana	WELL IM	WELL.MI	IE00BJQTJ848	-	BHRWXD1	EUR	0.59%
Deutsche Boerse Xetra	W311 GY	W311.DE	IE00BJQTJ848	-	BJ02354	EUR	0.59%
SIX Swiss Exchange	WELL SW	WELL.S	IE00BJQTJ848	47284465	BMYC3R3	CHF	0.59%

**Anthony Ginsberg, GinsGlobal Index Funds**

Anthony Ginsberg is the co-creator of the HAN-GINS Healthcare Megatrend UCITS ETF (WELL), enabling investors to gain exposure to over 100 leading healthcare companies across eight subthemes at the forefront of medical innovation. WELL tracks a rules-based index to identify and select companies involved in the field of innovative healthcare.

Anthony Ginsberg is the Managing Director of GinsGlobal Investment Management, a global asset management company offering a broad range of innovative index-linked products, for both retail and institutional investors. GinsGlobal designs index products for a number of leading financial institutions, including global insurers, banks and asset managers. GinsGlobal was founded in 2000 and has operations in North America, Africa, Middle East and Asia-Pacific.

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The ETF Prospectus, ETC Securities Documentation, and Cryptocurrency Prospectus can all be downloaded from [www.hanetf.com](http://www.hanetf.com). The decision and amount to invest in any Product should take into consideration your specific circumstances after seeking independent investment, tax and legal advice. We do not control and are not responsible for the content of third-party websites.

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