



Market Update: Q3 2022

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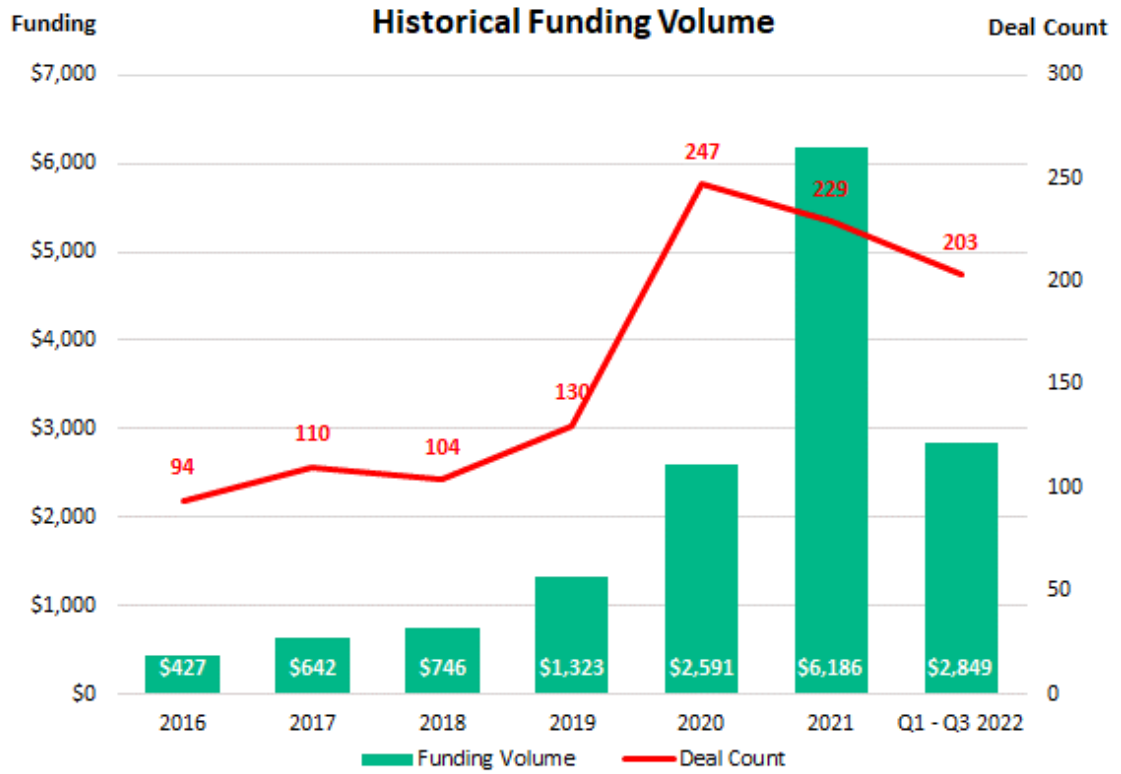


CONTENTS

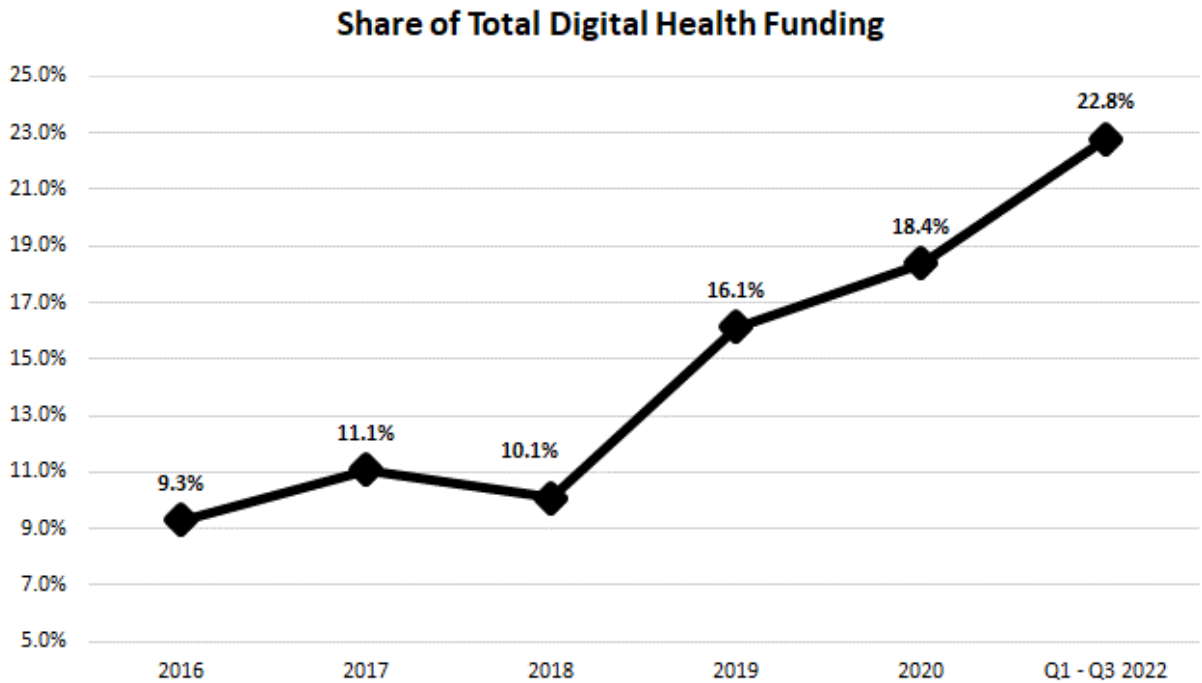
| | |
|-----------|---|
| Charts | 3 |
| Landscape | 4 |



CHARTS



Source: SEC, GIMBHI Database, Crunchbase, Pitchbook



Source: SEC, GIMBHI Database, Rock Health



GIMBHI LANDSCAPE



Rather than categorizations focused on the business model or target client, our methodology is product-focused. For example, Unmind is described as a workplace mental health platform that empowers employees to measure, understand, and improve their mental wellbeing. We put Unmind in the Interactive Software category because the platform offers self-guided programs and interactive courses focused on mental health. The **Wellness** category includes startups focused on mental, emotional, and cognitive wellness which would include meditation, mindfulness, positive psychology, sleep, and emotional well-being, among other areas. **Measurement, testing, and diagnostics** include startups such as Lineagen (a startup that provides genetic evaluation services for autism and developmental delay) and Neurotrack (a developer of digital cognitive health solutions to help individuals assess and monitor their cognitive health). **Interactive Software** includes companies that develop software to help treat or cope with mental health disorders, intellectual disabilities, or developmental disabilities. However, this category would exclude prescription software therapeutics. The **Provider Tools** category includes tools primarily targeted at mental healthcare providers such as Valant (EHR behavioral health software for private practices). **Digital Therapeutics** includes startups that have developed digital therapeutics or have stated an intention to develop digital therapeutics. We use the category of **Tech-Enabled Treatment Platforms** to include startups that leverage technology to provide mental healthcare but still offer traditional, in-person care delivery. This includes startups like TwoChairs and Eleanor Health. **Patient Tools** include tools created for patient or consumer use. The **Telehealth** bucket includes startups primarily focused on telehealth with a focus on mental health such as Talkspace and AbleTo.



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