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AGING
ANALYTICS
AGENCY

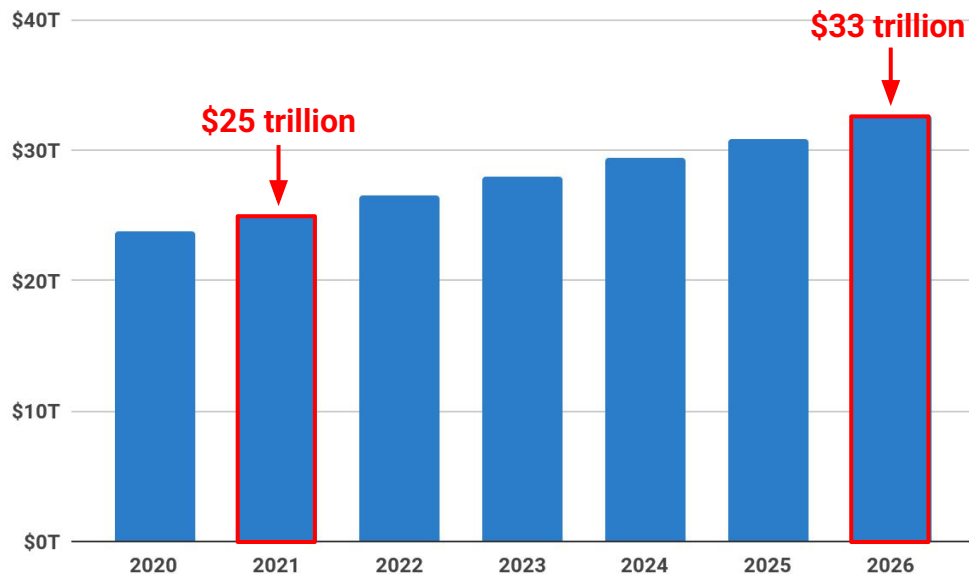
INVESTMENT DIGEST

Teaser

Longevity Industry Q1 2025

THE LONGEVITY ECONOMY ON A GLOBAL SCALE

The Longevity Economy: Scale Projections, Trillion USD



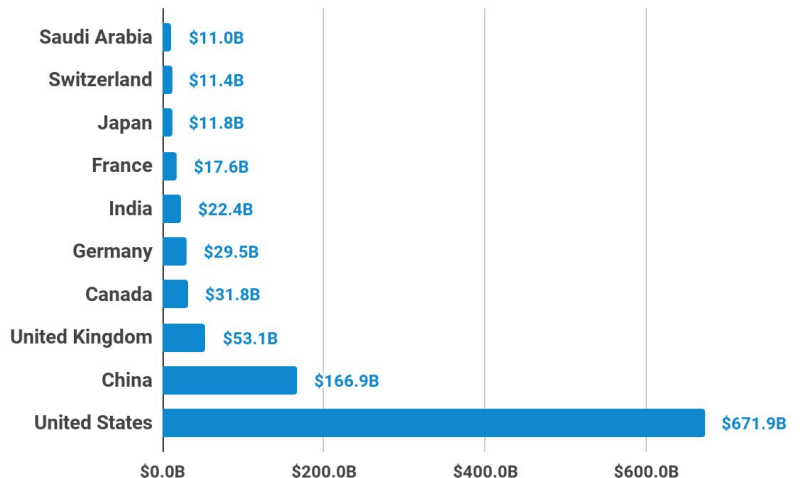
The Longevity Economy's Scale Projections contains global healthcare spending affecting Longevity, the combined capitalisation of publicly listed Longevity companies, the capitalisation of Longevity-related insurance and reinsurance companies, banks and pension funds and privately held Longevity companies.

Not only does ageing pose one of the most acute problems of our time - it also presents one of the most promising opportunities. Financial institutions, such as investment banks, pension funds, and insurance companies can either sink or swim when hit by the oncoming Silver Tsunami. Whether they will succeed in riding the wave or end up drowning under it will depend not only on their willingness to deploy new business models adapted to population ageing and emerging industries of AgeTech, WealthTech, and Longevity Finance, but also on the quality of Longevity analytics that they use to develop such business models.

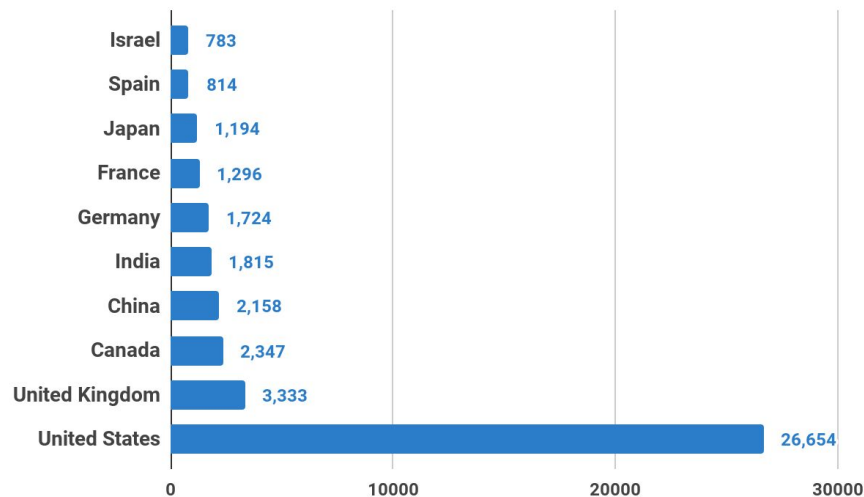
We define the Longevity Industry as a combination of ageing, advanced preventive precision biomedicine, AgeTech, relevant parts of national healthcare budgets, and the global financial industry related to such sub-industries.

TOP 10 COUNTRIES IN THE LONGEVITY SECTOR AS OF Q1 2025

Total Investment by Countries



Number of Companies



The chart on the left represents the top 10 countries with the largest total investment in the Longevity Industry (as of April 2022). The chart on the right shows the top 10 countries for the number of Longevity-focused companies. The undisputed leader here is the US which has a total of \$671.9 billion invested in 26,654 companies. It is followed by China, the second largest country for Longevity investment, which has a total of \$166.9 billion invested in 2,158 companies. China's closest competitor is the UK where funds are mostly raised from public sources and IPOs, not from private investors.

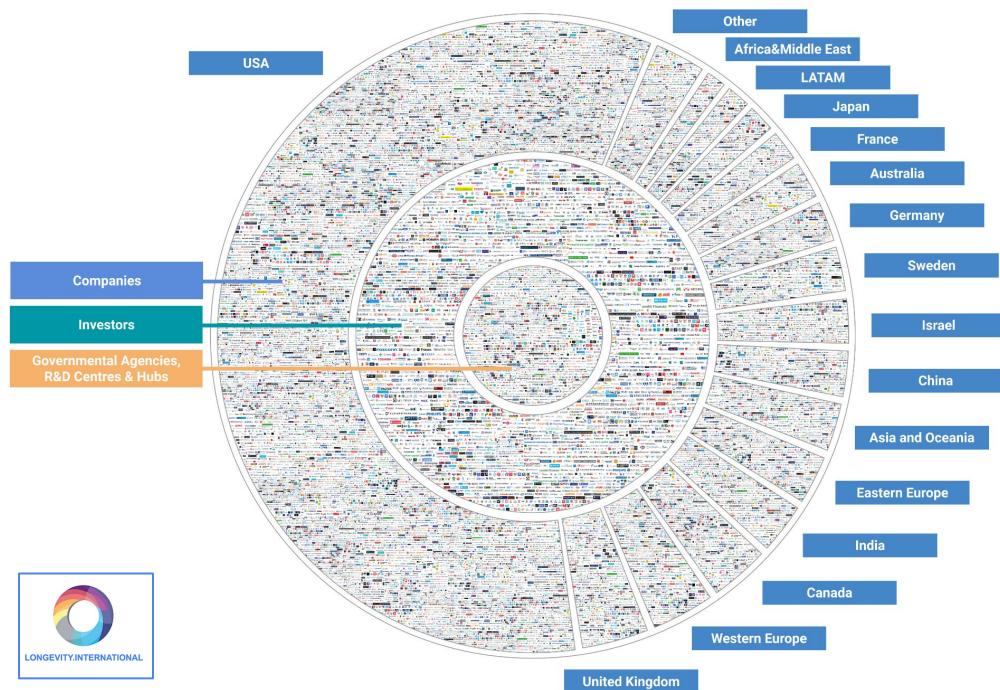
GLOBAL LONGEVITY ECOSYSTEM 2025

50,000 Companies

9,000 Investors

1,000 Hubs

20 Sectors



USA

UK

Canada

India

Japan

China

Sweden

Germany

Switzerland

Spain

CEE*

Singapore

Portugal

France

Brazil

Australia

MENA Region

EU

LONGEVITY INDUSTRY: MULTI-TRILLION DOLLAR OPPORTUNITY



FINANCIAL
TIMES

"The one billion retired people globally are a multi-trillion dollar opportunity for business "

~ Dmitry Kaminskiy, [interview in the Financial Times](#)

"We expect to add 1 billion older individuals in the next three to four decades, atop the more than 700 million older people we have today "

~ *International Monetary Fund*



LONGEVITY INDUSTRY: MULTI-TRILLION DOLLAR OPPORTUNITY

The Global Longevity Market is Estimated at \$27 trillion in 2025

50,000+ companies
(incl. 500 listed companies)

1,000+ R&D hubs

9,000+ investors

1,000+ financial institutions

100+ governments

160 subsectors

The Longevity market is not only limited to anti-ageing applications of life sciences. It also includes some new sectors of the financial industry, as well as government projects (national Longevity development plans); hence, its overall size potentially exceeds \$27 trillion. As the majority of full-blown Longevity startups are quickly becoming mature companies, large institutional investors are making increasingly more investments in the industry and a full-fledged Longevity infrastructure is emerging.

There are at least 500 publicly traded corporations that can be considered part of the Longevity industry.

Longevity Biomedicine, FinTech, and AgeTech industries include 50,000+ companies, 9,000+ investors, 20 sectors, and 160 subsectors.

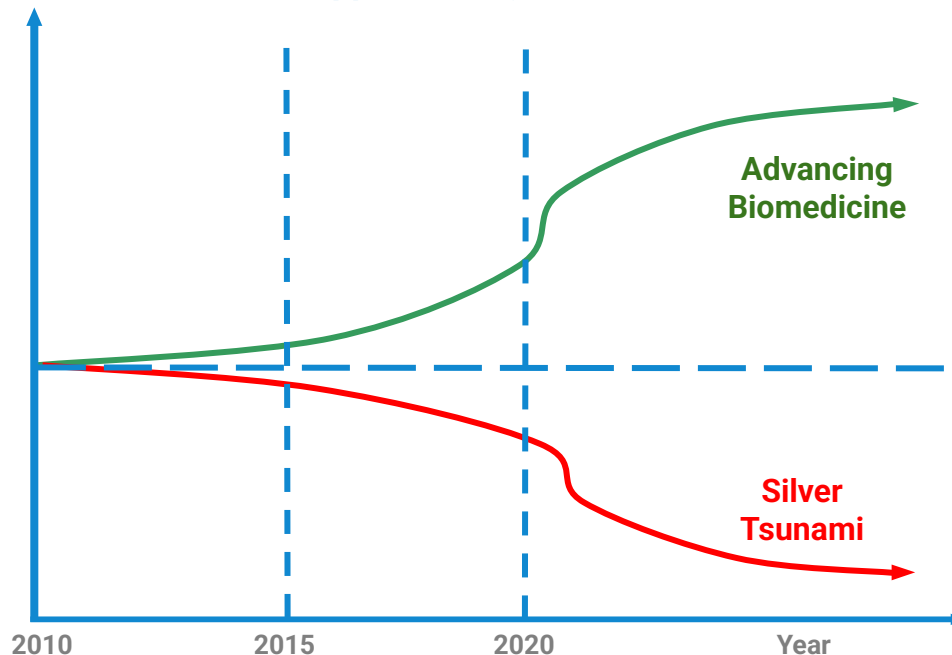
The Longevity Financial Industry includes 1,000+ corporations, 15 sectors, and 50 subsectors.

The Longevity Governance Landscape includes national healthcare budgets and development plans of at least 100 governments.

Note: Since there is no generally accepted methodology for their estimation, the numbers presented in the scheme are approximate.

LONGEVITY AND SILVER TSUNAMI - COLLISION OF TWO OPPOSING MEGATRENDS

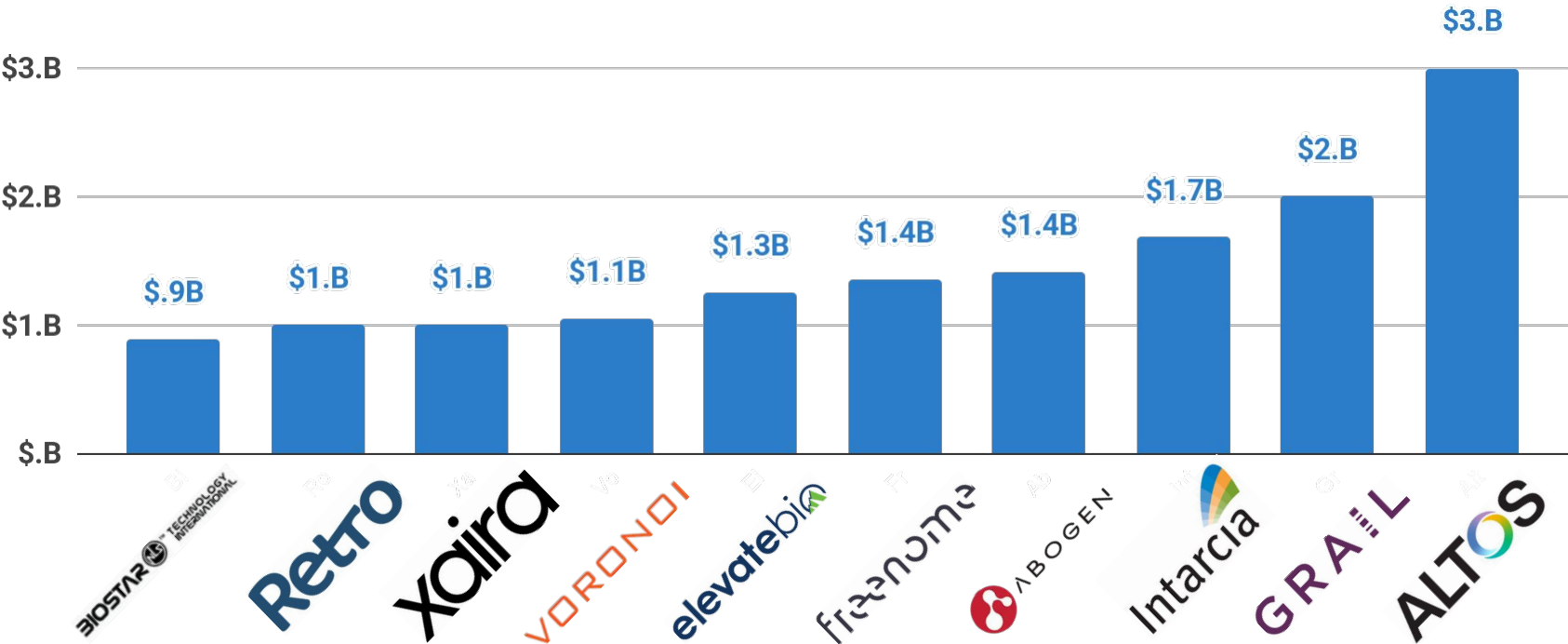
Two Opposed MegaTrends



Rapid progress in biomedicine has been mainly due to the advances in collection and analysis of data. The industry is poised to witness a quantum leap in the near future, particularly because of the impact made by Artificial Intelligence on biomedicine R&D and in light of the upcoming paradigm shift from treatment to prevention.

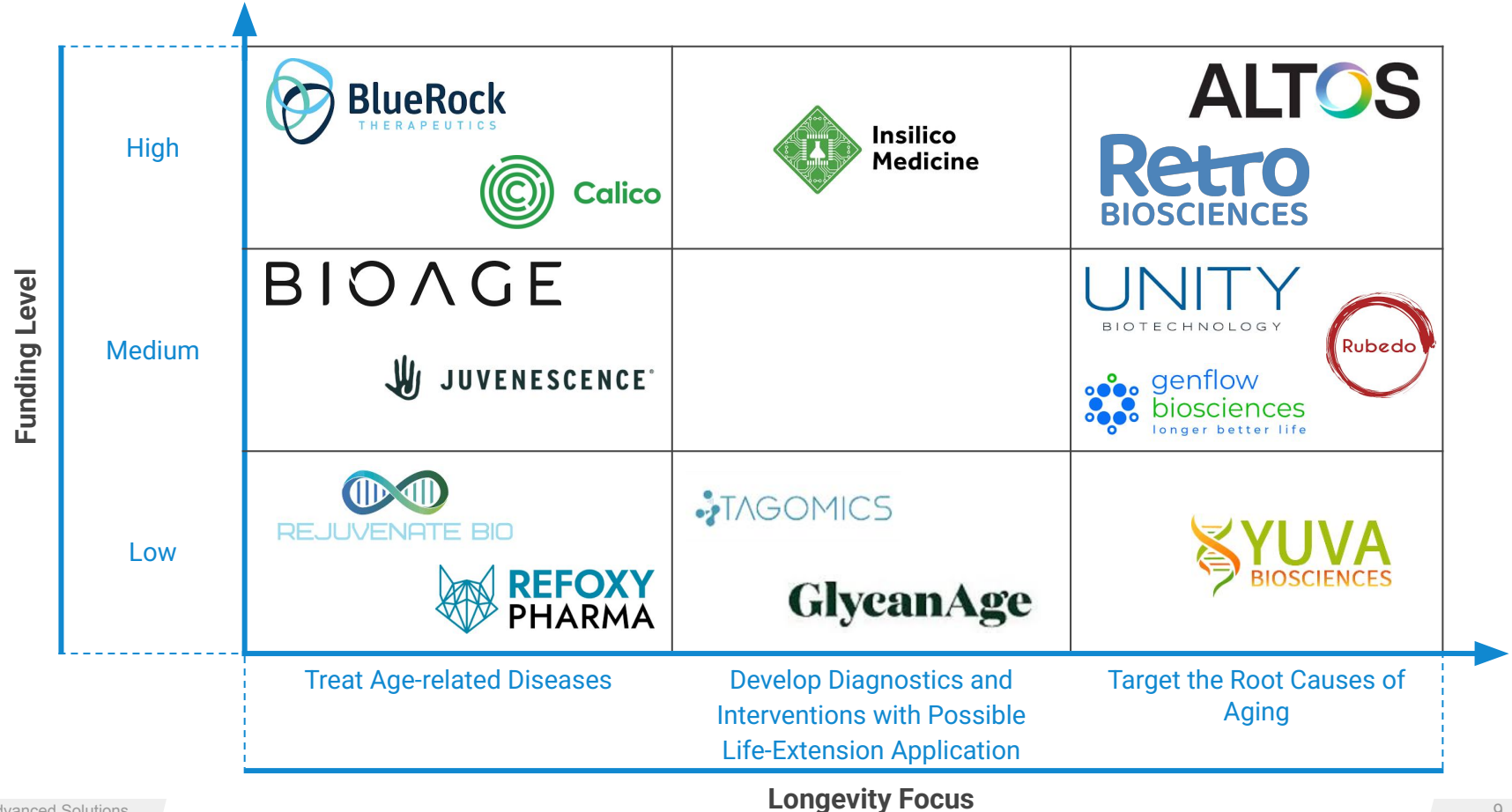
At the same time, the inevitable Silver Tsunami (demographic ageing) places a major economic burden not only on the healthcare systems of developing nations, but also on major financial institutions, including pension funds, insurance companies, asset management firms and retail/private wealth banks. It is also expected to increase costs associated with old age.

TOP 10 PRIVATE LONGEVITY-FOCUSED COMPANIES BY TOTAL INVESTMENTS AS OF Q1 2025



As of Q1 2025, the top 10 private longevity-focused companies have raised a total of approximately **\$14.6B** in investments. This sustained inflow of capital highlights the continued momentum in the Longevity, PharmTech, and HealthTech sectors. The industry’s resilience beyond the post-pandemic period reflects growing investor confidence in the potential of life extension technologies, regenerative medicine, and personalized healthcare.

TOP LONGEVITY COMPANIES BY FUNDING LEVEL AND SPECIALISATION



LONGEVITY INDUSTRY MARKET TIMELINE

The first approaches

- The first scalable approaches for Longevity biomedicine and biomarkers of ageing were developed and several industry players with forward-thinking executives started launching pilot collaborations and making small investments.

Criticism

- However, only few market players believed in anti-ageing technologies.
- Many pilot projects failed due to the lack of scientific validation and immaturity of the technologies, creating a lot of criticism towards the whole industry.
- Since then the race for the acquisition of the Longevity startups began.
- Testing of the technology began.

Industry development

- Capitalisation of the industry was continuously growing.
- Many bets of early investors appeared to be justified.
- Large financial institutions, as well as government agencies, started to express interest in the Longevity industry.

Transition from quantity to quality

- An important milestone in transitioning from the quantity of Longevity startups to qualitative gains – significant number of practical validations of previously conducted research appeared during this year.
- Competition for the most successful pharma AI companies increased dramatically.

Intensive competition

- Most developed Longevity startups are becoming mature companies, large institutional investors are being attracted to the industry, full-fledged Longevity infrastructure is being developed.
- Intensive cooperation of Longevity companies with corporations, banks, and governments begins.
- Competition among advanced Longevity companies booms.

2013-2016

2016-2018

2019-2021

2021-2023

2023-2025

LONGEVITY GOVERNANCE AND NATIONAL HEALTHCARE BUDGETS

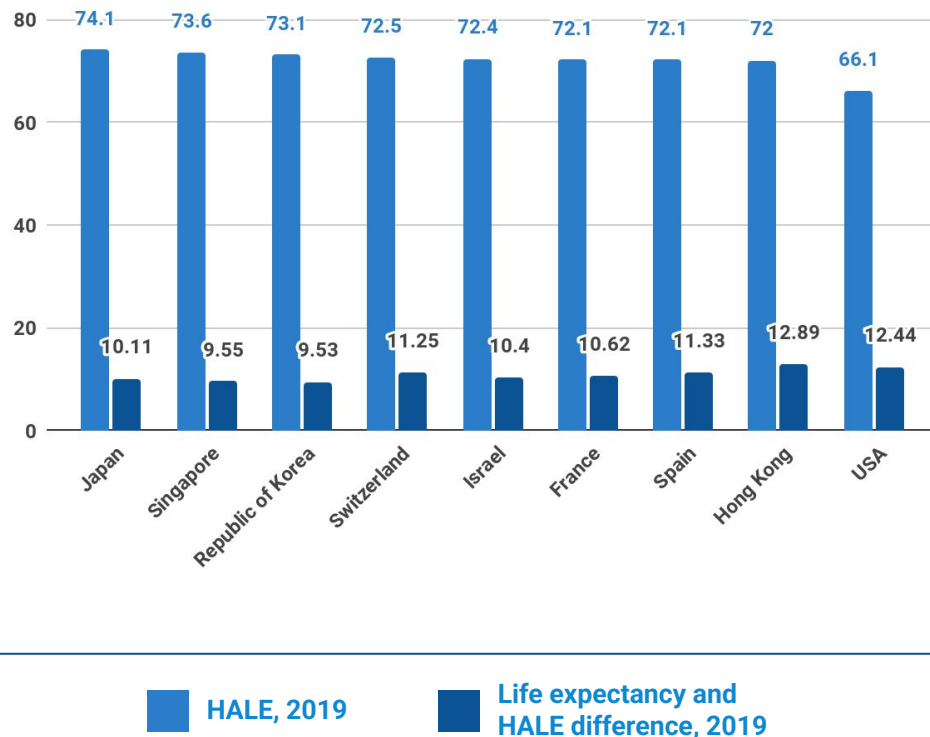
Overview



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LONGEVITY GOVERNANCE INDUSTRY: OVERVIEW



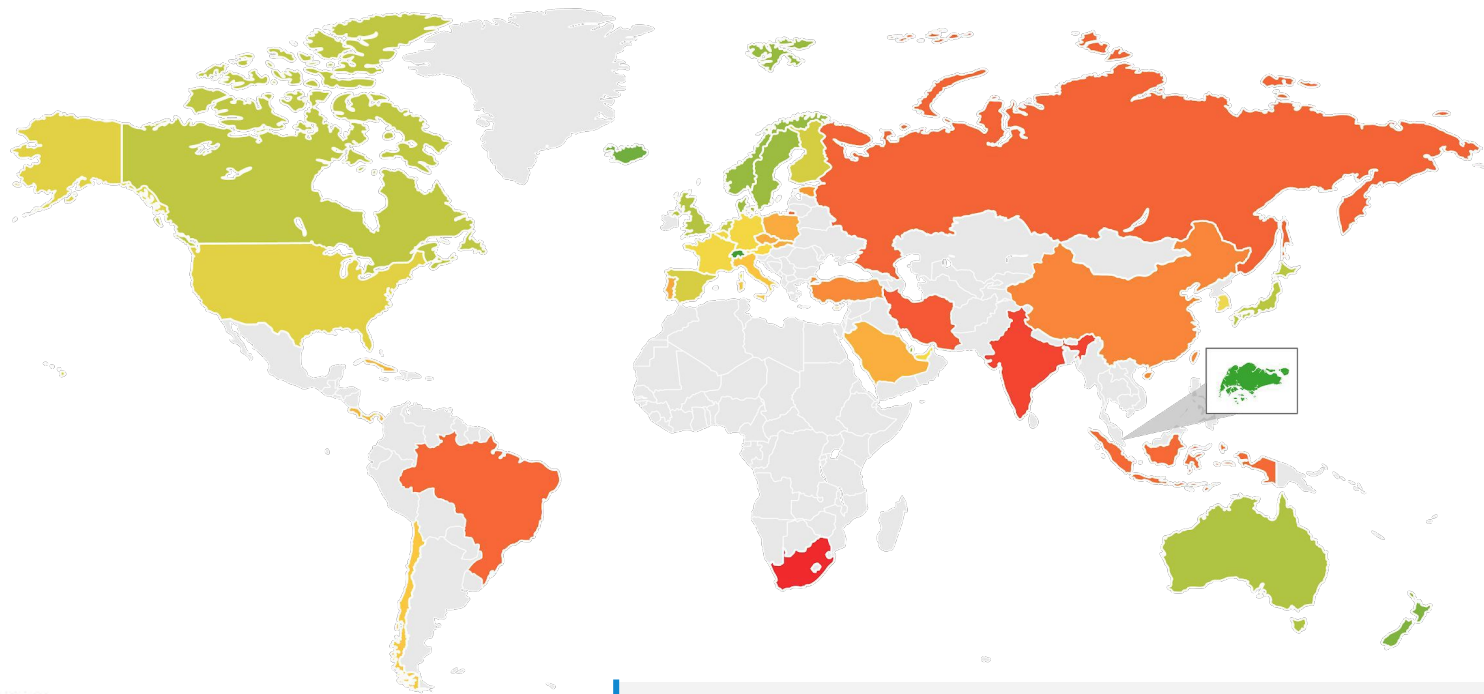
The main goal of the Longevity Governance Industry is to **reduce the gap between life expectancy and HALE** (Health-Adjusted Life Expectancy). Global Longevity Governance is a special analytical study that uses data across 50 countries to measure Healthy Longevity according to HALE. In so doing, it is able to identify the existing gaps between HALE and unadjusted life expectancy. All the parameters used in the report depend on the social policy, healthcare, medical, financial and socio-economic factors in a particular country. We provide an overview of countries with the lowest to highest HALE indicators.

The lowest gap between HALE and Life Expectancy is observed in **Singapore** where people tend to be wealthier and are, therefore, able to eat healthy food and have access to the best health care. However, this rule is not applicable to **the US**, which spends a significant amount of money on healthcare but still has a relatively low HALE. Countries in which people live in poor environmental conditions, do not have access to modern healthcare and appropriate nutrition also have a low HALE.

50 COUNTRIES: ANALYSIS OF LONGEVITY PROGRESS

1	Argentina	13	Estonia	26	Japan	39	Saudi Arabia
2	Australia	14	Finland	27	Luxembourg	40	Singapore
3	Austria	15	France	28	Malta	41	Slovakia
4	Belgium	16	Germany	29	Mexico	42	Slovenia
5	Brazil	17	Greece	30	Netherlands	43	South Africa
6	Canada	18	Hong-Kong, SAR	31	New Zealand	44	Spain
7	Chile	19	Iceland	32	Norway	45	Sweden
8	China	20	India	33	Panama	46	Switzerland
9	Costa Rica	21	Indonesia	34	Poland	47	Turkey
10	Cuba	22	Iran	35	Portugal	48	United Arab Emirates
11	Czech Republic	23	Ireland	36	Qatar	49	United Kingdom
12	Denmark	24	Israel	37	Republic of Korea	50	United States of America
		25	Italy	38	Russian Federation		

HALE RANKING AND GAP ESTIMATION



Health-Adjusted Life Expectancy (HALE), used here as a measure of Healthy Longevity, is the average number of years an individual can expect to live free of chronic age-related disease.

AGE-FRIENDLY BANKS

Overview



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AGE-FRIENDLY BANKS

The worldwide population of older people growing pushes even the most conservative financial institutions to examine how to make their products more "age-friendly." Banks that are age-friendly provide effective and specialised financial products, services, and safeguards for people over the age of 65.

The proportion of older people in the population is growing, which means there are fewer and fewer working-age people. Banks and financial services will need to meet the changing demands and expectations of customers in this new era.

Banks and financial institutions should think about creating new products for the growing number of older people, who are also living longer now and thus able to absorb higher financial risks than elderly people of past generations. So, there should be new thinking about investment plans and other products designed for this new generation of elderly citizens in this new era.

Innovation can be the answer to decumulation of wealth as well. Banks should pay attention to single elderly people who tend to live alone without descendants. These types of people need different kinds of loans that are specifically designed for retired people, such as reverse mortgages. These products can provide people the support they need for long-term, secure living.

Main Components of Age-Friendly Banking

1

Protecting older adults from financial abuse and fraud

2

Customising financial products and services to older adults needs

3

Expanding affordable financial management

4

Guaranteeing access to critical income supports

5

Facilitating ageing in the community

6

Improving the accessibility of banking for those with restricted mobility or living alone in remote areas

AGE-FRIENDLY NEOBANKS VS. TRADITIONAL BANKS

Neobanks

Neobanks are digital banks without any physical branches, developed for the growing masses of tech-savvy customers that prefer to manage their money using mobile apps or other digital media

Absence of expenses related to the maintenance of the bank's branch network

High speed and simplicity & comfort

Neobanks offer higher rate for savings and checking accounts

Neobanks work without reference to the office business hours. So, they are available 24/7 all year round. For a neobank, your location does not matter

Traditional Banks

Traditional banks have physical branches and actual people at the counters

Additional costs for customer service in offices and branches

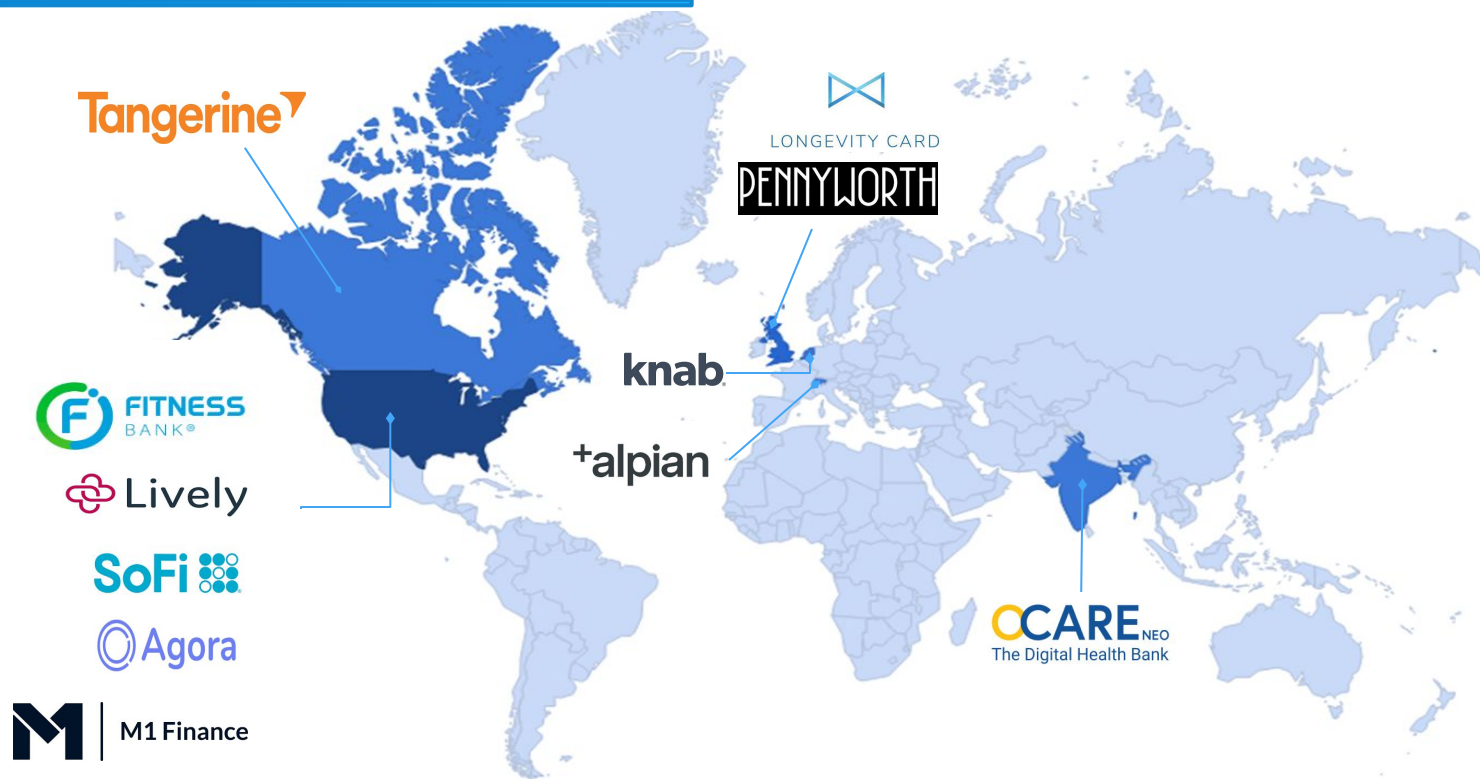
Length of making changes and taking decisions, and administration (bureaucracy)

Traditional banks offer lower rate for savings and checking accounts compared to neobanks

Traditional banks also keep up to date. Many of them provide mobile solutions with a variety of options. However, they may not be available everywhere

Neobanks are disrupting the traditional banking system by **leveraging technology** and **artificial intelligence (AI)** to offer a range of personalised services to customers. On the other hand, **traditional banks** follow an omnichannel approach i.e. having both physical (through branches and ATMs) and digital banking presence to offer a multitude of products and services.

AGE-FRIENDLY NEOBANKS: REGIONAL PROPORTION



USA having 5 Age-Friendly neobanks (**FitnessBank**, **Lively**, **SoFi**, **Agora** and **M1 Finance**) among 11 banks, is the most active country in this field, the second place belongs to **the UK** with two banks (**Longevity Card** and **Pennyworth**) and each of other countries (**Canada**, **India**, **Switzerland** and **Netherlands**) has an Age-Friendly neobank (respectively **Tangerine**, **Ocare**, **Alpian** and **Knab**).

PUBLICLY TRADED LONGEVITY-FOCUSED COMPANIES

Overview



Top 20 Publicly Traded Longevity-Focused Companies

NASDAQ



US-Based



UnitedHealth Group
(UNH)
Market Cap: \$500B



Amgen Inc. (AMGN)
Market Cap: \$150B



Gilead Sciences, Inc.
(GILD)
Market Cap: \$100B



Regeneron
Pharmaceuticals, Inc.
(REGN)
Market Cap: \$85B



Vertex
Pharmaceuticals
Incorporated (VRTX)
Market Cap: \$90B



Biogen Inc. (BIIB)
Market Cap: \$50B



Moderna, Inc. (MRNA)
Market Cap: \$60B



China-Based



BeiGene (BGNE)
Market Cap: \$20B



UK-Based



Abcam (ABCM)
Market Cap: \$4B



AstraZeneca PLC (AZN)
Market Cap: \$200B

Euronext Brussel (BR)



Switzerland-Based



Novartis AG (NVS)
Market Cap: \$200B



Sanofi (SNY)
Market Cap: \$120B



Sweden-Based



Getinge (GETI-B)
Market Cap: \$10B

Hong Kong (HKD)



Hong Kong-Based



CRISPR Therapeutics AG
(CRSP)
Market Cap: \$7B



Deep Longevity
Acquired by \$4M

NYSE



US-Based



Pfizer Inc. (PFE)
Market Cap: \$220B



Eli Lilly and Company
(LLY)
Market Cap: \$400B

Other



US-Based



Alnylam
Pharmaceuticals, Inc.
(ALNY)
Market Cap: \$30B



Editas Medicine, Inc.
(EDIT)
Market Cap: \$5B

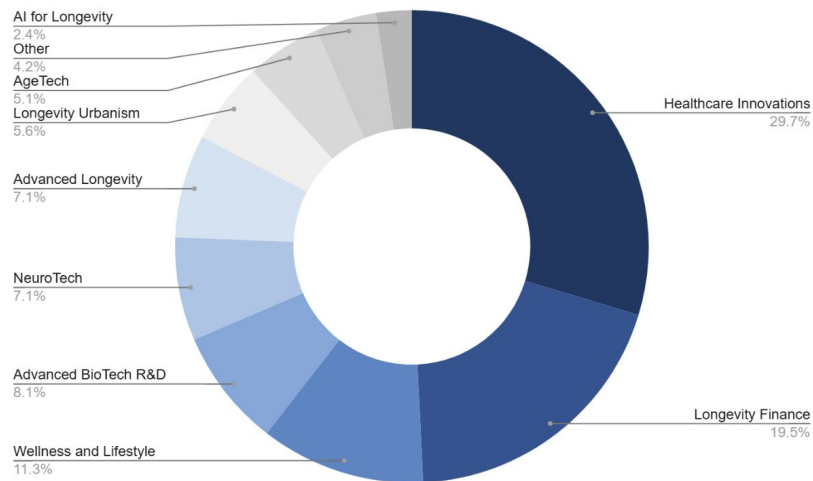


Sweden-Based



Roche Holding AG
(RHHBY)
Market Cap: \$300B

Distribution of Public Companies by Longevity Industry Sectors



Among 500 Longevity-focused public companies, **Healthcare Innovations, Longevity Finance and Wellness and Lifestyle** are the most represented sectors by a number of companies. As society's focus is shifting towards keeping older people healthy and active for longer, life sciences and tech-enabled solutions are key areas that are likely to attract even more investments in the near future.

IPOs in 2024

Company Name	Website	Location	Revenue	Product/Focus	IPO Money Raised	Ticker	IPO Date	Longevity Sub Sector
 CG Oncology	cgoncology.com	Irvine, California, USA	Not disclosed	Oncolytic immunotherapies	\$380 million	CGON	25/01/24	Preclinical Studies
 ArriVent Biopharma	arrivent.com	Philadelphia, Pennsylvania, USA	Not disclosed	Targeted cancer therapies	Not disclosed	ARVT	26/01/24	Preclinical Studies
 HaemaLogiX	haemalogix.com	Sydney, New South Wales, Australia	Not disclosed	Treatments for multiple myeloma	\$50 million	HLGX	01/04/24	Preclinical Studies
 Bicar Therapeutics	bicaratx.com	Cambridge, Massachusetts, USA	Not disclosed	Bifunctional antibodies for cancer	Not disclosed	BICR	15/09/24	Preclinical Studies
 MBX Biosciences	mbxbio.com	Carmel, Indiana, USA	Not disclosed	Endocrine disorders therapies	Not disclosed	MBXB	15/09/24	Preclinical Studies
 Zenas BioPharma	zenasbio.com	Waltham, Massachusetts, USA	Not disclosed	Autoimmune disease treatments	Not disclosed	ZENA	15/09/24	Preclinical Studies
 Upstream Bio	upstreambio.com	Cambridge, Massachusetts, USA	Not disclosed	Therapies for inflammatory diseases	\$255 million	UPST	11/10/24	Preclinical Studies
 CAMP4 Therapeutics	camp4tx.com	Cambridge, Massachusetts, USA	Not disclosed	Gene regulation therapies	\$75 million	CAMP	10/10/24	Preclinical Studies
 CAMP4 Therapeutics	odyssseytx.com	Boston, Massachusetts, USA	Not disclosed	Inflammatory diseases and cancer treatments	Not disclosed	ODYS	01/12/24	Preclinical Studies
 Aktis Oncology	aktisoncology.com	Cambridge, Massachusetts, USA	Not disclosed	Radiopharmaceuticals for cancer	Not disclosed	AKTS	01/12/24	Preclinical Studies

KEY TAKEAWAYS

Overview



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MAJOR OBSERVATIONS FOR 2024-2025: KEY BUSINESS TAKEAWAYS

1. The **Longevity** market is not only limited to anti-ageing applications of life sciences. It also includes some new sectors of the **financial industry**, as well as **government projects** (national Longevity development plans); hence, its overall size potentially **exceeds \$27 trillion**.
2. The **undisputed** leader in the Longevity sector is the **US** which has a total of **\$671.9 billion** invested in 26,654 companies (54% of all Longevity-related companies worldwide) followed by **China** with **\$166.9 billion** invested in 2,158 companies.
3. **PharmTech** and **P4 Medicine** are Longevity sub-sectors involving the largest number of companies and receiving the highest volume of investments with a total investment of **\$130.7B** and **\$85.4B**, within private companies respectively. Among 500 Longevity-focused public companies, **PharmTech**, **P4 Medicine** and **Deep Diagnostics** are the most represented sectors by a number of companies.
4. The financial sector is expected to witness **the rise of Age-Friendly banks**, a new form of organisation aimed at making banking easier for those over 60. In most ways, it would resemble a typical fintech bank that had been reprogrammed for older clientele. The creation of cellphones specialised for the elderly, which may be completed within a year, is one of the few remaining stages on the road to an Age-Friendly Bank.
5. The compound capitalisation of public Longevity companies experienced some turbulence during Q4 2024 with a maxim drop of 12 % compared to the beginning of the year. However, approaching Q1 2025 the capitalisation has almost stabilised to the pre-drop state.
6. The **lowest** gap between **HALE** and **Life Expectancy** is observed in **Singapore** where people tend to be wealthier and are, therefore, able to eat healthy food and have access to the best health care. HALE at birth in countries varies significantly. The **highest** value is in **Japan** (74 years) and the lowest value is in **Lesotho** (44 years). The **United States** is a high-income country where life expectancy is marginally **below** the average level of chosen countries (**70 years**).

INVESTTECH ADVANCED SOLUTIONS: ANALYTICAL REPORTS

InvestTech Advanced Solutions in cooperation with analytical subsidiaries of Deep Knowledge Group produces regular open-access reports covering emerging technologies, innovations, companies, and trends across the variety of DeepTech domains.

These reports focus on major areas of high-potential industries, maintaining ratings of market players based on their innovation potential and business activity.

The scope of analytical reports accounts for over 10 investment digests that are subject to periodic updates. The elements comprised in every report are as follows:

Industry
Trends

Investors

Investment
Rounds

R&D Trends

Venture
Capital
Ecosystem

Private
Companies

Public
Companies

M&A
Landscape

Explore the entire scope of analytical reports at:

www.invest-solutions.tech/reports

Longevity Investment Digest

This landmark report outlines major investment rounds, and relevant R&D trends, as well as illustrates the traction of the Longevity Industry and delivers a comparison of market players. The information in the digest covers key industry trends, 23,000 Longevity companies, 50 leading investors, and more than 600 Longevity-focused publicly traded corporations.



LONGEVITY FINANCE BIG DATA ANALYTICS DASHBOARD

Developed by InvestTech Advanced Solutions based on the data provided by the Aging Analytics Agency, the Longevity Finance Analytics Dashboard is a licensed white-label solution designed for financial corporations (e.g. banks, pension funds, asset management firms and insurance companies) looking to adjust their business models to Longevity-focused banking and **tap into the multi-trillion-dollar market of 1 billion people** in retirement.

The project aims to provide **tangible, data-driven, fast, comprehensive and inexpensive SWOT analysis, customised practical recommendations, benchmarking, forecasting and guidance** needed to transform financial institutions for Longevity-related challenges in the future.

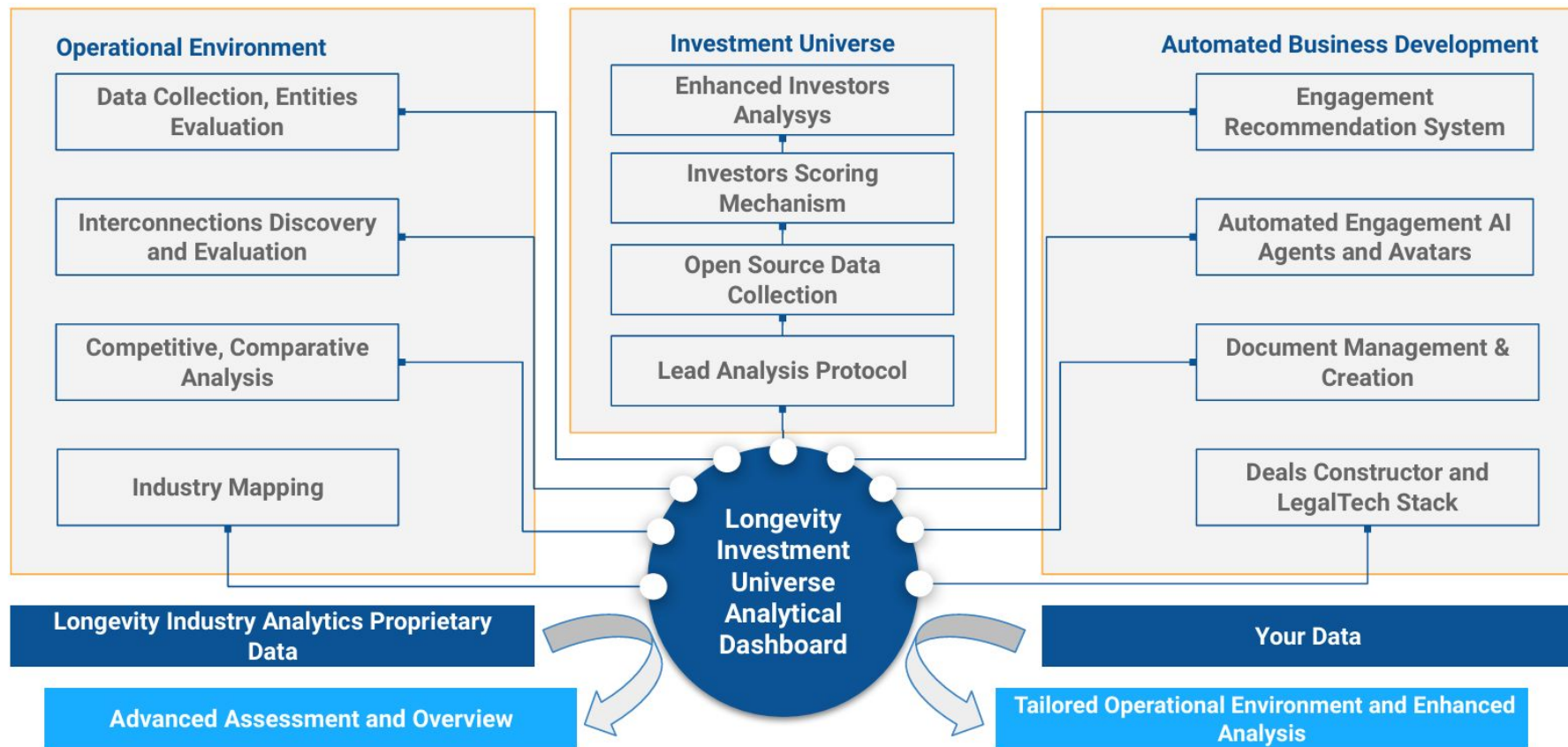


The analytics provided herein can help deliver value to financial institutions and adjust their business models to Longevity-related challenges in the future

Financial Institutions (e.g. Banks, Pension Funds, Asset Management Firms and Insurance Companies)

- SWOT analysis of the most promising entities and technologies
- Real-time monitoring of the developments in the Longevity financial industry
- Benchmarking the most market-ready Longevity finance technologies
- Due diligence of emerging technologies' strengths
- Opportunities forecasting

LONGEVITY INVESTMENT ANALYTICS DASHBOARD



INVESTTECH ADVANCED SOLUTIONS: PROPRIETARY ANALYTICS

Some of the more in-depth research is only available to our clients and strategic partners as proprietary analytics. As a rule, this analytics covers the topics that are of great interest to parties concerned and delivers an extensive scope of information on particular topics.

Proprietary Analytics delivers practical answers to certain questions in order to optimise the short and long-term strategies of companies related to the industry. Proprietary reports are supported by our rapidly developing data mining engine and analytics dashboards.

Ready-to-use
Proprietary
Reports

Custom
Consulting
Projects

Investment
Prospects

M&A
Prospects

Strategic
Growth Ideas

Trends
Profiling

Niche
Industries
Overviews

Case Studies

Access our website to learn more:

www.invest-solutions.tech

Proprietary Version of Longevity Derivatives and Financial Instruments Report

This report thoughtfully explores Longevity-derived financial instruments. The study includes derivatives explanation and analysis, including the comparison to other financial instruments. The proprietary version delivers an exhaustive overview of the biomarkers-based Longevity assessment solutions.



LONGEVITY INVESTMENT BIG DATA ANALYTICS DASHBOARD

The Longevity Investment Analytics Dashboard developed by InvestTech Advanced Solutions based on the data provided by the Aging Analytics Agency which is active in the industry since 2013 aims to produce **knowledge-based validated investment insights** covering four major Longevity branches: financial Longevity industry, Longevity R&D, Longevity medicine and Longevity technology.

The project generates **quantifiable and advanced data-driven investment recommendations** to conduct **an effective and inexpensive SWOT analysis and due diligence** for Longevity companies and investors, and **real-time financial analytics and consulting** for private and publicly traded companies across 20 Longevity sectors.



The analytics can deliver funding targets to investors, funding to companies and detailed SWOT analysis

Investors

- Comprehensive market analysis
- Due diligence and SWOT analysis of investment targets
- Analysis of the strategies of leading industry investors

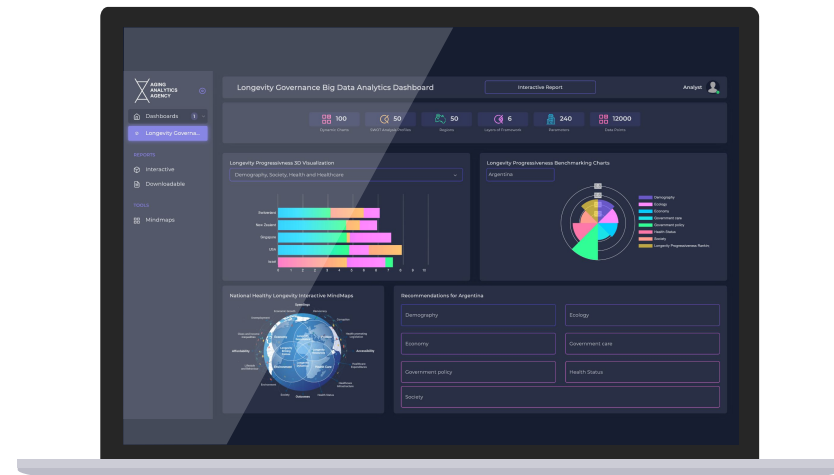
Companies

- SWOT analysis of competitors
- Automated business development recommendations
- AI-based matching with investors

LONGEVITY GOVERNANCE BIG DATA ANALYTICS DASHBOARD

The Longevity Governance Dashboard brings access to continuous monitoring of the specific governmental policy activities directly impacting both National Healthy Longevity and Longevity Industrialisation, and to consistently **tracking and analysis of data points related to government-led Longevity Development initiatives.**

Its aim is to deliver strategic decision-makers across the private sector, global investment community, financial industry, and governance **access to Big Data analytics and visualisation, market intelligence, competitive analysis, technology and company benchmarking, SWOT analysis, practical recommendations** and other strategic toolset capable of handling the unprecedented complexity and multidimensionality of the full-scope Global Longevity public and private sector ecosystem.



The analytics provided herein identifies factors with the greatest effect on the gap between life expectancy and Health-Adjusted Life Expectancy

Government Agencies, Healthcare, Economy & Industrial Development Ministries and International Policy Organisations

- Features region-specific recommendation packs
- Provides tangible and practical recommendations tuned to the specifics of individual countries
- Precision Health



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