Healthcare offers defensive and offensive capabilities. This mix can help portfolio managers weather various markets and encourage investors to stay the course.

Demographic growth—both defensive and offensive capabilities—will drive the treatment of certain diseases, such as hereditary illnesses.

New and developing treatments present exciting opportunities for patients, drug manufacturers and healthcare providers. For example, there has been a resurgence in the use of ADCs, which are monoclonal antibodies linked to toxic payloads. These therapies can be used to treat cancer or other diseases.

Kann: Over the last few years, technological innovation has disrupted multiple sectors, including healthcare. We are seeing tremendous advances in industries such as robotics, automation and AI. These technologies have the potential to drive innovation in healthcare, with the aim of improving patient outcomes and reducing costs.

Q Please share with us the scientific and technological breakthroughs that have fundamentally changed the practice of medicine...

What do you see as the key market drivers for developing the next generation of healthcare solutions?

Kann: There are several key market drivers that are driving the development of new healthcare solutions. These include advances in genomics, which are providing insights into the causes of disease and opportunities for personalized medicine. Artificial intelligence and data analytics are also playing a role in improving patient outcomes and reducing costs.

In the age of the patient empowerment, there is a growing demand for healthcare solutions that are personalized and patient-centered. This is leading to the development of new therapies and technologies that are specifically designed to meet the needs of individual patients.

However, the development of new healthcare solutions is not without challenges. There are significant regulatory hurdles to overcome, and the cost of development can be high. As a result, many companies are looking for ways to accelerate the development process and bring new therapies to market more quickly.

In conclusion, the development of new healthcare solutions is an important area of focus for investors. With advances in genomics, AI and data analytics, there are significant opportunities for innovation and growth in this space. However, companies will need to navigate the regulatory and reimbursement landscape to bring new therapies to market successfully.