Roche Patient Finder Suitability Analysis

Ada Cockpit | March 2026

Executive Summary

This analysis evaluates Roche's pharmaceutical portfolio for suitability with Ada Patient Finder, focusing on rare disease, specialty, and oncology drugs with high undiagnosed rates, diagnostic delays, and per-patient value. Patient Finder revenue model: 8-12% of first-year drug revenue per patient found.

Top Tier 1 Opportunities (Pursue Aggressively):

- **Ocrevus (MS)** - Largest revenue potential, clear diagnostic delays
- **Hemlibra (Hemophilia A)** - Ultra-high per-patient value, rare disease
- **Enspryng (NMOSD)** - Extreme rarity, massive underdiagnosis, $190K/year

Portfolio Summary

Drug	Indication	Tier	Fit Score	Addressable Undiagnosed (USA)	Ada Revenue Opportunity (1-5%)
Ocrevus (ocrelizumab)	**Multiple Sclerosis**	1	9/10	75,000	**$6.7M - $33.7M**
Hemlibra (emicizumab)	**Hemophilia A**	1	8/10	2,500	**$1.4M - $7.1M**
Enspryng (satralizumab)	**NMOSD**	1	7/10	3,800	**$764K - $3.8M**
Evrysdi (risdiplam)	Spinal Muscular Atrophy	2	5/10	500	**$286K - $1.4M**
Vabysmo (faricimab)	Wet AMD / DME	3	4/10	60,000	$1.3M - $6.4M
Tecentriq (atezolizumab)	Multiple Cancers	NO	3/10	N/A	Not suitable - diagnosed cancers
Polivy (polatuzumab)	R/R DLBCL	NO	1/10	N/A	Post-diagnosis only
Columvi (glofitamab)	R/R DLBCL	NO	1/10	N/A	Post-diagnosis only
Gazyva (obinutuzumab)	CLL / FL / Lupus	NO	2/10	N/A	Diagnosed conditions
Phesgo	HER2+ Breast Cancer	NO	1/10	N/A	Diagnosed cancer

Drug	Indication	Tier	Fit Score	Addressable Undiagnosed (USA)	Ada Revenue Opportunity (1-5%)
Kadcyla (T-DM1)	HER2+ Breast Cancer	NO	1/10	N/A	Patent expiring 2025-26
Perjeta (pertuzumab)	HER2+ Breast Cancer	NO	1/10	N/A	Patent expired 2025
Actemra (tocilizumab)	RA / GCA	3	3/10	N/A	Second-line, patent expiring
Lunsumio (mosunetuzumab)	R/R Follicular Lymphoma	NO	1/10	N/A	Post-diagnosis only
Inavolisib (Itovebi)	PIK3CA+ Breast Cancer	NO	1/10	N/A	Post-diagnosis, post-failure
Crovalimab	PNH	3	4/10	500	\$50K - \$250K

Detailed Drug Analysis

1. Ocrevus (Ocrelizumab) - Multiple Sclerosis

Market Size:

- US MS prevalence: ~1 million diagnosed cases

- Undiagnosed: 50,000-100,000 (diagnostic delay: 3 years average)
- Drug-addressable: 75,000 (RMS + PPMS eligible)

Economics:

- WAC: $78,858/year
- Net revenue per patient: ~$53,000/year
- 2023 global revenue: $7.1 billion
- Market share: 38% (market leader)

Patient Finder Opportunity:

- Ada can identify MS symptom patterns (vision issues, numbness, weakness, episodic nature)
- Ada surface ability: 8/10
- Company motivation: 9/10 (growth driver, competitive pressure)
- **1% penetration: $6.7M | 5% penetration: $33.7M Ada annual revenue**

Pitch:

"Ocrevus leads the $28B MS market, but 75,000 American MS patients wait 3 years for diagnosis while their disease progresses. Ada Patient Finder identifies these patients through symptom patterns and navigates them to neurologists—expanding your market by $4-20M in year one."

2. Hemlibra (Emicizumab) - Hemophilia A

Market Size:

- US Hemophilia A: ~14,900 diagnosed cases
- Undiagnosed: 3,000-5,000 (mild/moderate cases)
- Drug-addressable: 2,500 moderate cases

Economics:

- WAC: $465,000/year (highest in portfolio)
- Net revenue per patient: ~$337,500/year
- Estimated revenue: $3-4 billion globally
- Patent protection through 2032

Patient Finder Opportunity:

- Ada can identify bleeding patterns (easy bruising, prolonged bleeding, joint pain)
- Ada surface ability: 6/10 (requires targeted questioning)
- Company motivation: 8/10 (ultra-high per-patient value)
- **1% penetration: $1.4M | 5% penetration: $7.1M Ada annual revenue**

Pitch:

"Hemlibra generates $465,000 per patient annually, but 3,000+ Americans with moderate hemophilia A live undiagnosed, suffering preventable bleeding. Ada's targeted questions about bruising and bleeding patterns identify these patients and connect them to hematologists—worth $850K-$4M to Roche in year one alone."

3. Enspryng (Satralizumab) - NMOSD

Market Size:

- US NMOSD prevalence: ~23,100 total cases (6.9 per 100,000)
- Undiagnosed: 3,500-5,800 (15-25% due to MS misdiagnosis)
- Drug-addressable: 3,800 (AQP4-positive subset)

Economics:

- WAC: $190,000/year ($14,615 per dose, monthly)
- Net revenue per patient: ~$130,000/year
- Ultra-rare disease market
- Higher in Black females (19.2 per 100,000)

Patient Finder Opportunity:

- Ada can identify attack-based neurological symptoms (sudden vision loss, myelitis, brainstem symptoms)
- Ada surface ability: 6/10
- Company motivation: 8/10 (rare disease - every patient matters)
- **1% penetration: $764K | 5% penetration: $3.8M Ada annual revenue**

Pitch:

"3,800 Americans with NMOSD are misdiagnosed as MS, receiving wrong treatment while their rare disease progresses. Enspryng costs $190,000/year, and finding these patients is Roche's top priority. Ada's neurological symptom assessment identifies attack-based patterns and triggers AQP4 testing—connecting patients to correct diagnosis. Worth $494K-$2.5M annually to Roche, and life-changing for patients."

4. Evrysdi (Risdiplam) - Spinal Muscular Atrophy

Market Size:

- US SMA prevalence: ~3,350 total cases (1 per 100,000)
- Undiagnosed: 500-1,000 late-onset/adult cases (infantile cases now caught by newborn screening)
- Drug-addressable: 500 (limited by NBS implementation)

Economics:

- Estimated WAC: $300,000-400,000/year
- Net revenue per patient: ~$250,000/year
- Competing in ~$2B global SMA market

Patient Finder Opportunity:

- Ada difficulty: 4/10 (late-onset symptoms non-specific)

- Company motivation: 5/10 (NBS has eliminated largest segment)
- **1% penetration: $286K | 5% penetration: $1.4M Ada annual revenue**

Note:

This was a stronger opportunity pre-newborn screening. Now limited to late-onset/adult cases with progressive weakness.

Key Insights

Best Patient Finder Opportunities:

- **Rare diseases with diagnostic delays** (NMOSD, Hemophilia A)
- **Specialty drugs with long diagnostic odysseys** (MS)
- **Ultra-high per-patient value** (Hemlibra $465K WAC)

Poor Patient Finder Fit:

- Oncology drugs for diagnosed cancers (most of portfolio)
- Relapsed/refractory settings (post-diagnosis, post-treatment)
- Mature products facing biosimilars (Perjeta, Kadcyla, Actemra)
- Conditions with screening programs (SMA with newborn screening)

Ada's Strongest Surface:

- Neurological symptoms (MS, NMOSD)
- Bleeding patterns (Hemophilia A)
- Attack-based episodic symptoms

Recommended Approach

Priority 1: Ocrevus Partnership

- Largest revenue opportunity ($6.7M-$33.7M)
- Clear diagnostic delays (3 years average)
- Ada can identify MS symptom patterns effectively
- Roche highly motivated (competitive pressure from Kesimpta)

Priority 2: Hemlibra Partnership

- Ultra-high per-patient value ($465K WAC)
- Clear undiagnosed population (mild/moderate hemophilia A)
- Rare disease model where patient finding is critical

Priority 3: Enspryng Partnership

- Extreme rarity + high undiagnosed rate
- Explicit Roche goal: find MS-misdiagnosed NMOSD patients
- High per-patient value ($190K WAC)
- Strong rare disease motivation

Avoid:

- Oncology drugs (not Patient Finder model)
- Mature products with patent expiry
