clarius

Clarity You Can Trust

Handheld Ultrasound

Empowering Imaging across the Enterprise

Clarius Mobile Health

Founded: 2014
HQ: Vancouver, BC

Mission Better patient care enabled by medical imaging in every setting

The Evolution of Ultrasound

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$$$

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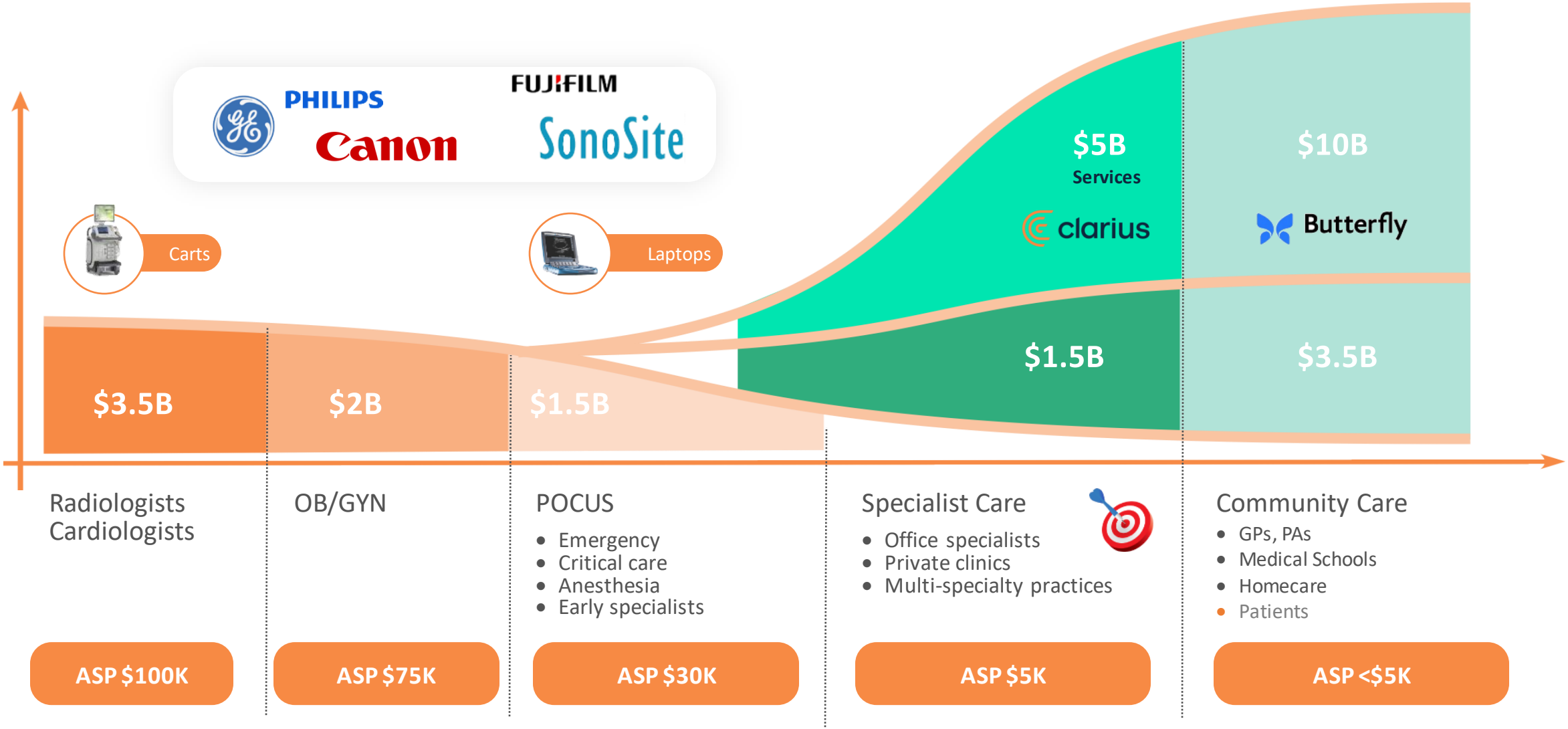
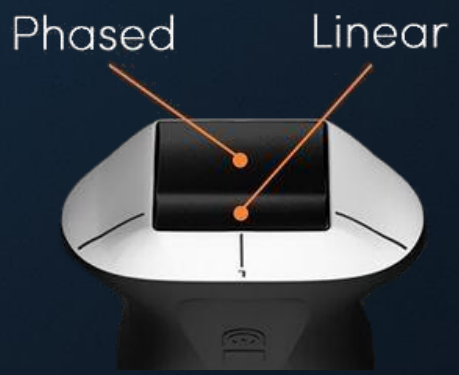
Market


PHILIPS
FUJIFILM
Canon
SonoSite
Carts
Laptops
$3.5B
$2B
$1.5B
$5B
Services
clarius
$1.5B
$10B
Butterfly
$3.5B
Radiologists
Cardiologists
OB/GYN
POCUS
• Emergency
• Critical care
• Anesthesia
• Early specialists
Specialist Care
• Office specialists
• Private clinics
• Multi-specialty practices
Community Care
• GPs, PAs
• Medical Schools
• Homecare
• Patients
ASP $100K
ASP $75K
ASP $30K
ASP $5K
ASP <$5K

Piezo Performance

Companies like **GE** and **Clarius** have taken approaches to combine multiple piezoelectic transducers within the same device to offer similar performance to other ultrasound carts that take advantage of the mature technology.



xMUT Technologies

Having been researched for over two decades, technologies like **cMUT** and **pMUT** have now been commercialized to offer flexible designs that allow the production of **low cost matrix arrays** that can include volumetric imaging.

By combining **semiconductor** technology within the **acoustics** itself, the future of ultrasound is now fabricated like your Apple M3 or AMD Ryzen processor.

The Evolution of Clarius

2016

2019

2022

Broad Spectrum

2 MHz — *Frequency* — 20 MHz

1-4 MHz

2-5 MHz

4-7 MHz

4-7 MHz
(endocavitary)

5-12 MHz

7-15 MHz

10-20 MHz

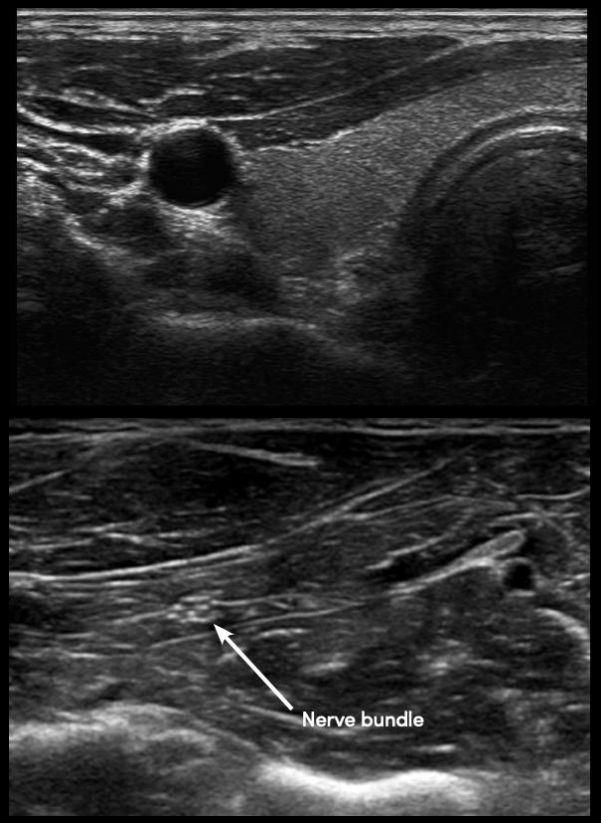
Differentiated models that vary in frequency and footprint that tailor to various ultrasound use-cases

Product Fit

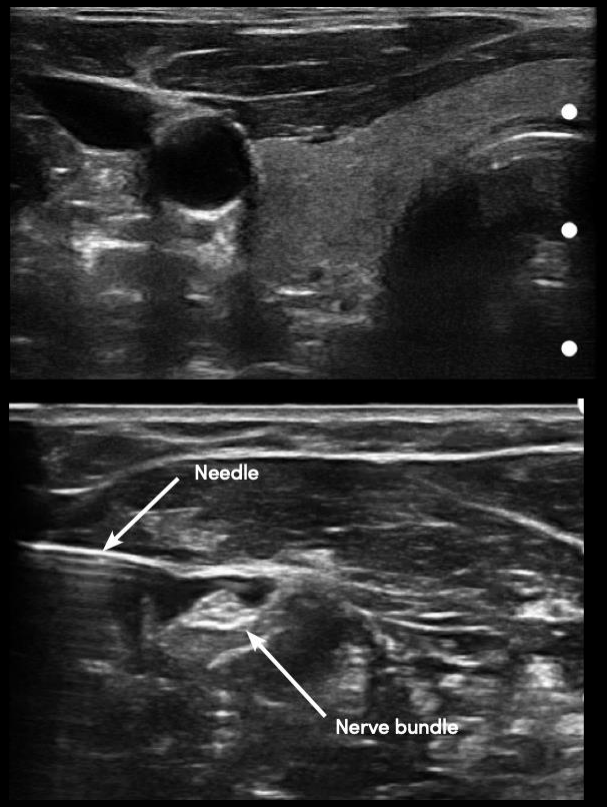
2 MHz — *Frequency* — 20 MHz

Cardiac Assessment	Obstetrics Interventional Radiology	Veterinary Pediatric	Early Pregnancy Fertility Urology / Prostate	Vascular		Aesthetics
Emergency Medicine Critical Care EMS / Ambulatory General Practitioner Medical Education				MSK / Orthopedics Pain Management Plastic Surgery Endocrinology	Rheumatology Podiatry	

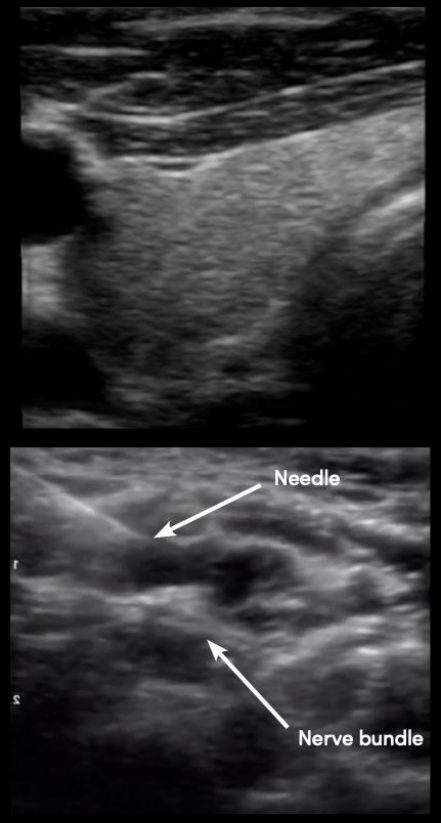
Image Comparison – Thyroid/Nerve



Philips CX 50
Reference



Clarius
Better resolution, contrast.
Wider field of view



Butterfly IQ
Reference

Value Proposition

Improve patient outcomes

change care pathway based on instant diagnosis, better procedure guidance, lower malpractice costs

Expand scope of services

performing more complex procedures, perform procedures in office, increase reimbursement

Differentiate the practice

higher trust/confidence, improve efficiency vs traditional ultrasound, more repeat customers

Clarius L15

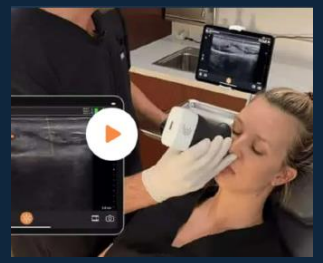
Musculoskeletal / Anesthesiology

Needle guidance

Musculoskeletal diagnosis

Sports medicine doctors, Pain specialists, Anesthesiologists, GPs

Clarius L20



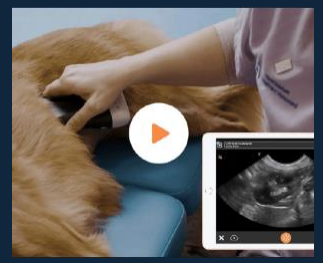
Aesthetics / Plastic Surgery

Needle guidance

Procedure safety

Plastic surgeons, Aesthetics doctors, Nurses doing injections

Clarius C7VET



Veterinary

Point of care answers

Veterinary FAST exams

Veterinary doctors

Clarius C3

Emergency Care / Critical Care

Point of care answers

Cardiac evaluation

Emergency doctors, Critical Care doctors, EMTs

Clarius Ecosystem

Scanners

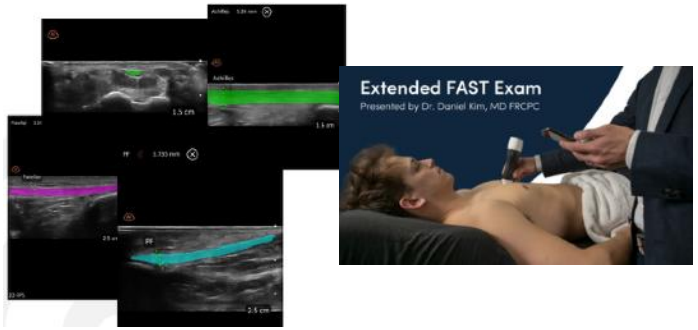
Wireless | Handheld | **Specialized**

Best In Class Imaging | Affordable

App

Simplified | Classroom | AI Powered

Specialty Packages



Cloud

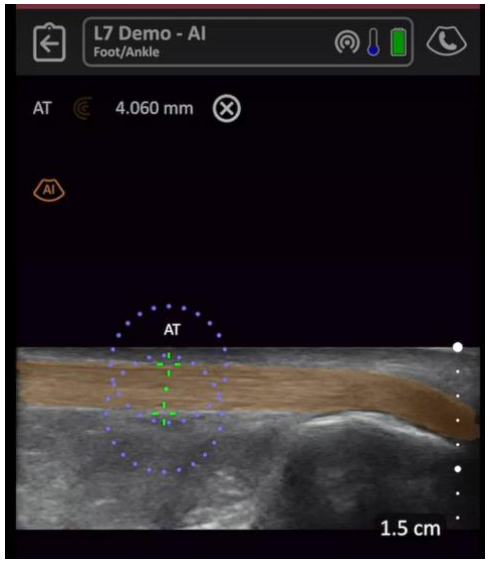
Storage | Reporting | Tele-medicine

Collaboration | 3rd Party Applications

AI Features

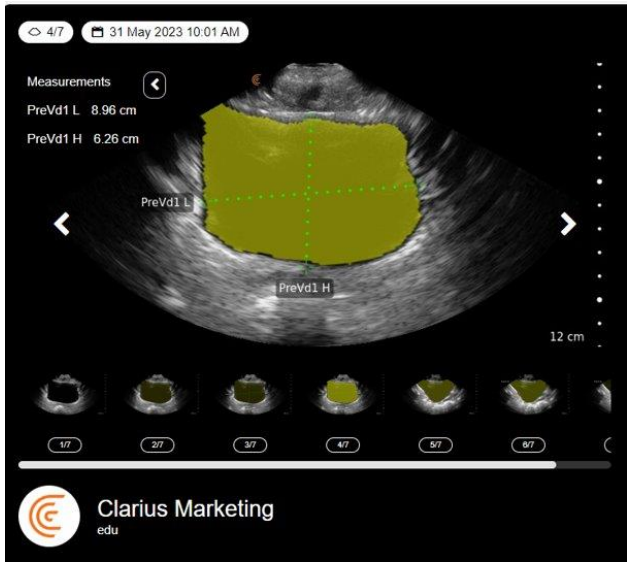
In addition to the existing system-level AI capabilities for automating presets, gain, frequency and depth, Clarius has developed dedicated indication-specific AI models

Tendon Segmentation & Measurement



Automated segmentation & caliper placement for 4 main tendons

Automated Bladder Calculations



Automated bladder volume outputs

Education AI (T-Mode)

Texture overlay to educate users on the grayscale anatomy being scanned

Enterprise Product Portfolio

The only handheld solution to address a wide range of specialties across the entire hospital system

PAL HD3

- Launched late 2023
- Designed for:
  - EMED/Critical Care
  - Internal Medicine
  - Anesthesia
  - Nursing Stations
- Dual Cardiac and High Frequency Linear
- Broadest frequency range of any handheld product:
  - Clarius PAL - 1-15 MHz
  - GE Vscan Air - 3-12 MHz
  - Butterfly iQ - 1-10 MHz

Fleet / User Management

- Hospital EMR & PACS connectivity
- SSO, MDM
- Device management, allocation, tracking
- Enterprise domain management

Rural Health

With the portability and affordability that handheld ultrasound provides, rural health practitioners now have a much more **accessible** pathway to utilize medical imaging.

In scenarios where patients often had to be **airlifted** to a major centers to get time-critical diagnostics performed, ultrasound is now playing a role in reducing these costly transfers and helping to make **on the spot decisions**.

With further advances in integrated cloud tools and telemedicine, physicians also have the ability to get second opinions in real-time.