



INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET, FORECAST TO 2033

2026

2033

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The Precision Medicine and Genomics Ecosystem market was valued at USD 2,843.7 million in 2025 and is projected to reach USD 8,163.7 million by 2033, at a CAGR of 14.2% during the forecast period.

This report focuses on the Precision Medicine and Genomics Ecosystem market revenue in India at the company level. From an India perspective, this report represents the overall market size by analyzing historical data and future prospects.

Key Points Covered in the Report

- Market revenue of Precision Medicine and Genomics Ecosystem market from 2021 to 2033.
- Market forecast for Precision Medicine and Genomics Ecosystem market from 2026 to 2033.
- Regional market share and revenue from 2021 to 2033.
- Company market share analysis, competitive scenario, ranking, and detailed company profiles.
- Market drivers, restraints, and detailed analysis of the Precision Medicine and Genomics Ecosystem Market.

Key Players of Precision Medicine and Genomics Ecosystem Market

HOL India Pvt Ltd (HARLEY of LONDON)

MedGenome Labs Ltd.

Strand Life Sciences Private Limited

MapmyGenome India Ltd.

4baseCare Onco Solutions Pvt. Ltd.

Canary Oncoceutics, Inc.

Redcliffe Lifetech Pvt. Ltd.

HaystackAnalytics Private Limited

Neuberg Diagnostics Pvt. Ltd.

Dr. Lal PathLabs Ltd.

Metropolis Healthcare Ltd.

Others

Key Type of Precision Medicine and Genomics Ecosystem Market**Precision Diagnostics****Precision Therapeutics Support****Genomic Testing****Multi-omics Testing****Companion Diagnostics****Pharmacogenomics Solutions****Molecular Oncology and Tumor Profiling****Clinical Bioinformatics and Interpretation Platforms****Personalized Preventive Health and Wellness Genomics****Others**

Key Application of Precision Medicine and Genomics Ecosystem Market**Oncology****Rare and Inherited Diseases****Cardiology****Neurology****Reproductive and Prenatal Health****Infectious Disease Genomics****Metabolic Disorders****Immunology and Autoimmune Disorders****Drug Response and Therapy Optimization****Others**

Key Region of Precision Medicine and Genomics Ecosystem Market

North India

South India

West India

East India

Central India

Table of Contents

| | | |
|--------|---|----|
| 1 | Precision Medicine and Genomics Ecosystem Market Overview | 23 |
| 1.1 | Product Overview and Scope of Precision Medicine and Genomics Ecosystem | 23 |
| 1.2 | Classification of Precision Medicine and Genomics Ecosystem by Type | 25 |
| 1.2.1 | India Precision Medicine and Genomics Ecosystem Market Revenue Comparison by Type (2025-2033) | 25 |
| 1.2.2 | India Precision Medicine and Genomics Ecosystem Revenue Market Share by Type in 2025 | 26 |
| 1.2.3 | Precision Diagnostics..... | 27 |
| 1.2.4 | Precision Therapeutics Support | 28 |
| 1.2.5 | Genomic Testing | 29 |
| 1.2.6 | Multi-omics Testing..... | 30 |
| 1.2.7 | Companion Diagnostics | 31 |
| 1.2.8 | Pharmacogenomics Solutions..... | 32 |
| 1.2.9 | Molecular Oncology and Tumor Profiling..... | 33 |
| 1.2.10 | Clinical Bioinformatics and Interpretation Platforms..... | 34 |
| 1.2.11 | Personalized Preventive Health and Wellness Genomics..... | 35 |
| 1.2.12 | Others..... | 36 |
| 1.3 | India Precision Medicine and Genomics Ecosystem Market by Application | 37 |
| 1.3.1 | India Precision Medicine and Genomics Ecosystem Market Size and Market Share Comparison by Application (2025-2033)..... | 37 |
| 1.3.2 | Oncology..... | 39 |
| 1.3.3 | Rare and Inherited Diseases | 40 |
| 1.3.4 | Cardiology..... | 41 |
| 1.3.5 | Neurology..... | 42 |
| 1.3.6 | Reproductive and Prenatal Health | 43 |
| 1.3.7 | Infectious Disease Genomics | 44 |
| 1.3.8 | Metabolic Disorders..... | 45 |
| 1.3.9 | Immunology and Autoimmune Disorders | 46 |
| 1.3.10 | Drug Response and Therapy Optimization..... | 47 |
| 1.3.11 | Others..... | 48 |
| 1.4 | Classification of Precision Medicine and Genomics Ecosystem by Region | 49 |
| 1.4.1 | India Precision Medicine and Genomics Ecosystem Market Revenue Comparison by Region (2025-2033) | 49 |

| | | |
|-------|---|----|
| 1.4.2 | India Precision Medicine and Genomics Ecosystem Revenue Market Share by Region in 2025..... | 49 |
| 1.4.3 | North India | 50 |
| 1.4.4 | South India | 51 |
| 1.4.5 | West India | 52 |
| 1.4.6 | East India | 53 |
| 1.4.7 | Central India | 54 |
| 1.5 | India Market Size of Precision Medicine and Genomics Ecosystem (2021-2033)..... | 55 |
| 2 | Market Dynamics..... | 56 |
| 2.1 | Market Drivers..... | 56 |
| 2.1.1 | Government-backed initiatives such as GenomeIndia and DBT genomics infrastructure are expanding India-specific genomic datasets and strengthening the base for precision diagnostics and targeted care. | 56 |
| 2.1.2 | ABDM-led digital health interoperability, along with rising use of NGS, liquid biopsy, AI, and molecular diagnostics, is accelerating precision-health deployment across care settings. | 57 |
| 2.2 | Market Restraints..... | 58 |
| 2.2.1 | High testing and therapy costs, technical complexity, and the need for advanced laboratories and skilled personnel continue to restrict large-scale adoption. | 58 |
| 2.2.2 | Limited Indian genotype-phenotype reference databases, uneven infrastructure, and gaps in clinician awareness for variant interpretation slow broader clinical integration. | 59 |
| 2.3 | Market Opportunities | 60 |
| 2.3.1 | Development of India-specific biomarker panels, genomic chips, and clinico-genomic data platforms creates a strong opportunity to lower costs, improve local validation, and scale precision oncology and preventive genomics. | 60 |
| 2.4 | Porter's Five Forces Analysis | 62 |
| 2.4.1 | Threat of New Entrants: Moderate | 62 |
| 2.4.2 | Bargaining Power of Suppliers: Moderate to High..... | 62 |
| 2.4.3 | Bargaining Power of Buyers: Moderate to High..... | 62 |
| 2.4.4 | Threat of Substitutes: Moderate | 63 |
| 2.4.5 | Competitive Rivalry: High..... | 63 |
| 2.5 | SWOT Analysis..... | 64 |
| 2.5.1 | Strengths | 64 |
| 2.5.2 | Weaknesses..... | 64 |

| | | |
|----------|---|-----------|
| 2.5.3 | Opportunities | 65 |
| 2.5.4 | Threats..... | 66 |
| 3 | Harley of London India and MyCare 360: Positioning within India’s Emerging Precision Medicine Ecosystem..... | 67 |
| 3.1 | HOLNESS Framework and Precision Health Positioning | 67 |
| 3.2 | Integration of Precision Diagnostics, Multi-Omics, and Preventive Health | 69 |
| 3.3 | Population-Scale Personalized Care Pathways..... | 71 |
| 3.4 | Clinical Decision Support and Therapy Optimization | 73 |
| 3.5 | Unified AI-Enabled Continuum of Care..... | 75 |
| 3.6 | Alignment with India’s Emerging Precision-Health Infrastructure | 77 |
| 3.7 | Ecosystem Impact Potential of MyCare 360..... | 79 |
| 3.8 | Strategic Outlook for Harley of London India | 80 |
| 3.9 | Strategic Implications | 82 |
| 3.10 | Market Opportunity for HARLEY of LONDON..... | 83 |
| 3.10.1 | Preventive-care Monetization | 83 |
| 3.10.2 | Digital-health Revenue Pathways..... | 83 |
| 3.10.3 | Longevity and Wellness Integration | 84 |
| 3.11 | Competitive Advantage..... | 85 |
| 4 | Company Profiles..... | 87 |
| 4.1 | HOL India Pvt Ltd (HARLEY of LONDON)..... | 87 |
| 4.1.1 | Company Basic Information and Its Competitors..... | 87 |
| 4.1.2 | HOL India Pvt Ltd (HARLEY of LONDON) Product Category..... | 87 |
| 4.1.2.1 | MyCare 360..... | 87 |
| 4.1.2.2 | HOLNESS | 88 |
| 4.1.3 | Unified Global Identity, India Strategy, Ecosystem Architecture, and Precision-Health Enablement | 88 |
| 4.1.4 | HOL India Pvt Ltd (HARLEY of LONDON) Recent Developments | 90 |
| 4.1.5 | Main Business/Business Overview | 91 |
| 4.2 | MedGenome Labs Ltd. | 92 |
| 4.2.1 | Company Basic Information and Its Competitors..... | 92 |
| 4.2.2 | MedGenome Labs Ltd. Product Category | 92 |
| 4.2.2.1 | Reproductive Health Testing Solutions | 92 |
| 4.2.2.2 | Rare Inherited Disorders Testing Solutions..... | 93 |
| 4.2.2.3 | Oncology Testing Solutions | 93 |

| | | |
|---------|--|-----|
| 4.2.2.4 | Infectious Diseases Testing Solutions | 93 |
| 4.2.2.5 | Research Services | 94 |
| 4.2.3 | MedGenome Labs Ltd. Precision Medicine and Genomics Ecosystem Revenue (2023-2025) | 94 |
| 4.2.4 | MedGenome Labs Ltd. Recent Developments | 95 |
| 4.2.5 | Main Business/Business Overview | 96 |
| 4.3 | Strand Life Sciences Private Limited | 97 |
| 4.3.1 | Company Basic Information and Its Competitors | 97 |
| 4.3.2 | Strand Life Sciences Private Limited Product Category | 97 |
| 4.3.2.1 | Oncology Solutions | 97 |
| 4.3.2.2 | Rare Disease and Reproductive Health Solution | 98 |
| 4.3.2.3 | Genomic Wellness | 98 |
| 4.3.2.4 | Multiomics Services | 99 |
| 4.3.3 | Strand Life Sciences Private Limited Precision Medicine and Genomics Ecosystem Revenue (2023-2025) | 99 |
| 4.3.4 | Strand Life Sciences Private Limited Recent Developments | 101 |
| 4.3.5 | Main Business/Business Overview | 102 |
| 4.4 | MapmyGenome India Ltd. | 103 |
| 4.4.1 | Company Basic Information and Its Competitors | 103 |
| 4.4.2 | MapmyGenome India Ltd. Product Category | 103 |
| 4.4.2.1 | OncoMap | 103 |
| 4.4.2.2 | BabyMap | 104 |
| 4.4.2.3 | RareMap | 104 |
| 4.4.2.4 | BodyMap | 104 |
| 4.4.2.5 | Other Tests | 104 |
| 4.4.2.6 | Wellness Products | 105 |
| 4.4.3 | MapmyGenome India Ltd. Precision Medicine and Genomics Ecosystem Revenue (2023-2025) | 105 |
| 4.4.4 | MapmyGenome India Ltd. Recent Developments | 106 |
| 4.4.5 | Main Business/Business Overview | 107 |
| 4.5 | 4baseCare Onco Solutions Pvt. Ltd. | 108 |
| 4.5.1 | Company Basic Information and Its Competitors | 108 |
| 4.5.2 | 4baseCare Onco Solutions Pvt. Ltd. Product Category | 108 |
| 4.5.2.1 | Genomic Tests | 108 |
| 4.5.2.2 | OncoTwin | 109 |
| 4.5.2.3 | Global Cancer Diversity Atlas (GCDA) | 109 |

| | | |
|----------|---|-----|
| 4.5.3 | 4baseCare Onco Solutions Pvt. Ltd. Precision Medicine and Genomics Ecosystem Revenue (2023-2025)..... | 109 |
| 4.5.4 | 4baseCare Onco Solutions Pvt. Ltd. Recent Developments | 111 |
| 4.5.5 | Main Business/Business Overview | 112 |
| 4.6 | Canary Oncoceutics, Inc. | 113 |
| 4.6.1 | Company Basic Information and Its Competitors..... | 113 |
| 4.6.2 | Canary Oncoceutics, Inc. Product Category | 113 |
| 4.6.2.1 | Canary Acuity..... | 113 |
| 4.6.2.2 | Canary Focus..... | 114 |
| 4.6.2.3 | Canary Pulse | 114 |
| 4.6.2.4 | Canary Stat..... | 114 |
| 4.6.2.5 | Canary HRD | 115 |
| 4.6.2.6 | Canary Stat Heredit | 115 |
| 4.6.3 | Canary Oncoceutics, Inc. Precision Medicine and Genomics Ecosystem Revenue (2023-2025) | 115 |
| 4.6.4 | Main Business/Business Overview | 116 |
| 4.7 | Redcliffe Lifetech Pvt. Ltd..... | 117 |
| 4.7.1 | Company Basic Information and Its Competitors..... | 117 |
| 4.7.2 | Redcliffe Lifetech Pvt. Ltd. Product Category | 117 |
| 4.7.2.1 | Whole Genome Sequencing..... | 117 |
| 4.7.2.2 | Whole Exome Sequencing..... | 118 |
| 4.7.2.3 | Shotgun Metagenomics Sequencing..... | 118 |
| 4.7.2.4 | Amplicon Sequencing | 118 |
| 4.7.2.5 | ChIP Sequencing | 119 |
| 4.7.2.6 | Whole Genome Bisulphite Sequencing..... | 119 |
| 4.7.2.7 | Transcriptome Sequencing..... | 119 |
| 4.7.2.8 | GeoMX Digital Spatial Profiler | 120 |
| 4.7.2.9 | nCounter | 120 |
| 4.7.2.10 | NGS Genotyping | 120 |
| 4.7.3 | Redcliffe Lifetech Pvt. Ltd. Precision Medicine and Genomics Ecosystem Revenue (2023-2025)..... | 121 |
| 4.7.4 | Redcliffe Lifetech Pvt. Ltd. Recent Developments..... | 122 |
| 4.7.5 | Main Business/Business Overview | 123 |
| 4.8 | HaystackAnalytics Private Limited | 124 |
| 4.8.1 | Company Basic Information and Its Competitors..... | 124 |
| 4.8.2 | HaystackAnalytics Private Limited Product Category | 124 |

| | | |
|----------|--|-----|
| 4.8.2.1 | Universal Infectious Diseases Test | 124 |
| 4.8.2.2 | ΩTB Test..... | 124 |
| 4.8.2.3 | Identifi..... | 125 |
| 4.8.3 | HaystackAnalytics Private Limited Precision Medicine and Genomics Ecosystem Revenue (2023-2025)..... | 125 |
| 4.8.4 | HaystackAnalytics Private Limited Recent Developments | 126 |
| 4.8.5 | Main Business/Business Overview..... | 127 |
| 4.9 | Neuberg Diagnostics Pvt. Ltd. | 128 |
| 4.9.1 | Company Basic Information and Its Competitors..... | 128 |
| 4.9.2 | Neuberg Diagnostics Pvt. Ltd. Product Category..... | 128 |
| 4.9.2.1 | Inherited Genomics Testing | 128 |
| 4.9.2.2 | Reproductive Genomics Testing..... | 129 |
| 4.9.2.3 | Cancer Genomics Testing | 129 |
| 4.9.2.4 | Haemato Oncology..... | 129 |
| 4.9.2.5 | Transplant Immunogenetics Testing..... | 130 |
| 4.9.2.6 | Pharmacogenomics Testing | 130 |
| 4.9.2.7 | Personalized Genomics Testing..... | 131 |
| 4.9.2.8 | DNA Fingerprinting Testing | 131 |
| 4.9.3 | Neuberg Diagnostics Pvt. Ltd. Precision Medicine and Genomics Ecosystem Revenue (2023-2025)..... | 132 |
| 4.9.4 | Neuberg Diagnostics Pvt. Ltd. Recent Developments | 133 |
| 4.9.5 | Main Business/Business Overview..... | 134 |
| 4.10 | Dr. Lal PathLabs Ltd. | 135 |
| 4.10.1 | Company Basic Information and Its Competitors..... | 135 |
| 4.10.2 | Dr. Lal PathLabs Ltd. Product Category..... | 135 |
| 4.10.2.1 | Pharmacogenomics Testing | 135 |
| 4.10.2.2 | Genetic Disorders Testing | 136 |
| 4.10.2.3 | Prenatal Diagnosis Testing | 136 |
| 4.10.2.4 | Transplant Precision Diagnostics..... | 137 |
| 4.10.3 | Dr. Lal PathLabs Ltd. Precision Medicine and Genomics Ecosystem Revenue (2023-2025) | 137 |
| 4.10.4 | Dr. Lal PathLabs Ltd. Recent Developments | 139 |
| 4.10.5 | Main Business/Business Overview..... | 140 |
| 4.11 | Metropolis Healthcare Ltd. | 141 |
| 4.11.1 | Company Basic Information and Its Competitors..... | 141 |
| 4.11.2 | Metropolis Healthcare Ltd. Product Category..... | 141 |

| | | |
|----------|--|-----|
| 4.11.2.1 | Oncology Genomic Testing..... | 141 |
| 4.11.2.2 | Women and Child Health Genomic Testing..... | 142 |
| 4.11.2.3 | Neurology Genomic Testing..... | 142 |
| 4.11.2.4 | Nephrology Genomic Testing..... | 143 |
| 4.11.2.5 | Gastroenterology and Liver Disorders Testing..... | 143 |
| 4.11.2.6 | Endocrinology Genomic Testing..... | 144 |
| 4.11.3 | Metropolis Healthcare Ltd. Precision Medicine and Genomics Ecosystem Revenue (2023-2025)..... | 144 |
| 4.11.4 | Metropolis Healthcare Ltd. Recent Developments..... | 146 |
| 4.11.5 | Main Business/Business Overview..... | 147 |
| 5 | India Precision Medicine and Genomics Ecosystem Market Competition, by Players..... | 148 |
| 5.1 | India Precision Medicine and Genomics Ecosystem Market Revenue and Share by Players (2023-2025)..... | 148 |
| 5.2 | Market Concentration Rate..... | 151 |
| 5.2.1 | Top 3 Precision Medicine and Genomics Ecosystem Players Market Share ... | 151 |
| 5.2.2 | Top 5 Precision Medicine and Genomics Ecosystem Players Market Share ... | 152 |
| 6 | India Precision Medicine and Genomics Ecosystem Market Segment by Type..... | 153 |
| 6.1 | India Precision Medicine and Genomics Ecosystem Market Revenue and Market Share by Type (2021-2025)..... | 153 |
| 6.2 | Precision Diagnostics..... | 157 |
| 6.3 | Precision Therapeutics Support..... | 158 |
| 6.4 | Genomic Testing..... | 159 |
| 6.5 | Multi-omics Testing..... | 160 |
| 6.6 | Companion Diagnostics..... | 161 |
| 6.7 | Pharmacogenomics Solutions..... | 162 |
| 6.8 | Molecular Oncology and Tumor Profiling..... | 163 |
| 6.9 | Clinical Bioinformatics and Interpretation Platforms..... | 164 |
| 6.10 | Personalized Preventive Health and Wellness Genomics..... | 165 |
| 6.11 | Others..... | 166 |
| 6.12 | India Precision Medicine and Genomics Ecosystem Market Forecast by Type (2026-2033)..... | 167 |
| 7 | India Precision Medicine and Genomics Ecosystem Market Segment by Application..... | 169 |
| 7.1 | India Precision Medicine and Genomics Ecosystem Market Share by Application (2021-2025)..... | 169 |
| 7.2 | Oncology..... | 173 |

| | | |
|-----------|---|------------|
| 7.3 | Rare and Inherited Diseases..... | 174 |
| 7.4 | Cardiology..... | 175 |
| 7.5 | Neurology..... | 176 |
| 7.6 | Reproductive and Prenatal Health..... | 177 |
| 7.7 | Infectious Disease Genomics..... | 178 |
| 7.8 | Metabolic Disorders..... | 179 |
| 7.9 | Immunology and Autoimmune Disorders..... | 180 |
| 7.10 | Drug Response and Therapy Optimization..... | 181 |
| 7.11 | Others..... | 182 |
| 7.12 | Precision Medicine and Genomics Ecosystem Market Forecast by Application (2026-2033)..... | 183 |
| 8 | India Precision Medicine and Genomics Ecosystem Market Segment by Region..... | 185 |
| 8.1 | India Precision Medicine and Genomics Ecosystem Market Share by Region (2021-2025)..... | 185 |
| 8.2 | North India..... | 188 |
| 8.3 | South India..... | 189 |
| 8.4 | West India..... | 190 |
| 8.5 | East India..... | 191 |
| 8.6 | Central India..... | 192 |
| 8.7 | Precision Medicine and Genomics Ecosystem Market Forecast by Region (2026-2033)..... | 193 |
| 9 | India Precision Medicine and Genomics Ecosystem Market Size Forecast (2026-2033)..... | 194 |
| 9.1 | India Precision Medicine and Genomics Ecosystem Market Size Forecast (2026-2033)..... | 194 |
| 9.1.1 | India Precision Medicine and Genomics Ecosystem Market Revenue Forecast by Type (2026-2033)..... | 195 |
| 9.1.2 | India Precision Medicine and Genomics Ecosystem Market Revenue Forecast by Application (2026-2033)..... | 196 |
| 9.1.3 | India Precision Medicine and Genomics Ecosystem Market Revenue Forecast by Region (2026-2033)..... | 197 |
| 10 | Appendix..... | 198 |
| 10.1 | Methodology..... | 198 |
| 10.2 | Primary Research..... | 198 |
| 10.3 | Research Methodology..... | 199 |
| 10.4 | Assumptions & Exclusions..... | 200 |
| 10.5 | Secondary data sources..... | 200 |
| 10.6 | Disclaimer..... | 201 |

List of Tables

| | | |
|----------|---|-----|
| TABLE 1 | INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET REVENUE (MILLION USD) SPLIT BY TYPE | 25 |
| TABLE 2 | INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM REVENUE (USD MILLION) BY APPLICATION (2025-2033) | 37 |
| TABLE 3 | INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET REVENUE (MILLION USD) SPLIT BY REGION | 49 |
| TABLE 4 | HOL INDIA PVT LTD (HARLEY OF LONDON) BASIC INFORMATION AND ITS COMPETITORS | 87 |
| TABLE 5 | RECENT DEVELOPMENTS | 90 |
| TABLE 6 | MEDGENOME LABS LTD. BASIC INFORMATION AND ITS COMPETITORS | 92 |
| TABLE 7 | MEDGENOME LABS LTD. PRECISION MEDICINE AND GENOMICS ECOSYSTEM REVENUE (USD MILLION) AND MARKET SHARE (2023-2025) | 94 |
| TABLE 8 | RECENT DEVELOPMENTS | 95 |
| TABLE 9 | STRAND LIFE SCIENCES PRIVATE LIMITED BASIC INFORMATION AND ITS COMPETITORS | 97 |
| TABLE 10 | STRAND LIFE SCIENCES PRIVATE LIMITED PRECISION MEDICINE AND GENOMICS ECOSYSTEM REVENUE (USD MILLION) AND MARKET SHARE (2023-2025) | 99 |
| TABLE 11 | RECENT DEVELOPMENTS | 101 |
| TABLE 12 | MAPMYGENOME INDIA LTD. BASIC INFORMATION AND ITS COMPETITORS | 103 |
| TABLE 13 | MAPMYGENOME INDIA LTD. PRECISION MEDICINE AND GENOMICS ECOSYSTEM REVENUE (USD MILLION) AND MARKET SHARE (2023-2025) | 105 |
| TABLE 14 | RECENT DEVELOPMENTS | 106 |
| TABLE 15 | 4BASECARE ONCO SOLUTIONS PVT. LTD. BASIC INFORMATION AND ITS COMPETITORS | 108 |
| TABLE 16 | 4BASECARE ONCO SOLUTIONS PVT. LTD. PRECISION MEDICINE AND GENOMICS ECOSYSTEM REVENUE (USD MILLION) AND MARKET SHARE (2023-2025) | 109 |
| TABLE 17 | RECENT DEVELOPMENTS | 111 |
| TABLE 18 | CANARY ONCOCEUTICS, INC. BASIC INFORMATION AND ITS COMPETITORS | 113 |
| TABLE 19 | CANARY ONCOCEUTICS, INC. PRECISION MEDICINE AND GENOMICS ECOSYSTEM REVENUE (USD MILLION) AND MARKET SHARE (2023-2025) | 115 |
| TABLE 20 | REDCLIFFE LIFETECH PVT. LTD. BASIC INFORMATION AND ITS COMPETITORS | 117 |
| TABLE 21 | REDCLIFFE LIFETECH PVT. LTD. PRECISION MEDICINE AND GENOMICS ECOSYSTEM REVENUE (USD MILLION) AND MARKET SHARE (2023-2025) | 121 |
| TABLE 22 | RECENT DEVELOPMENTS | 122 |
| TABLE 23 | HAYSTACKANALYTICS PRIVATE LIMITED BASIC INFORMATION AND ITS COMPETITORS | 124 |
| TABLE 24 | HAYSTACKANALYTICS PRIVATE LIMITED PRECISION MEDICINE AND GENOMICS ECOSYSTEM REVENUE (USD MILLION) AND MARKET SHARE (2023-2025) | 125 |
| TABLE 25 | RECENT DEVELOPMENTS | 126 |

| | | |
|----------|--|-----|
| TABLE 26 | NEUBERG DIAGNOSTICS PVT. LTD. BASIC INFORMATION AND ITS COMPETITORS | 128 |
| TABLE 27 | NEUBERG DIAGNOSTICS PVT. LTD. PRECISION MEDICINE AND GENOMICS ECOSYSTEM REVENUE (USD MILLION) AND MARKET SHARE (2023-2025) | 132 |
| TABLE 28 | RECENT DEVELOPMENTS | 133 |
| TABLE 29 | DR. LAL PATHLABS LTD. BASIC INFORMATION AND ITS COMPETITORS | 135 |
| TABLE 30 | DR. LAL PATHLABS LTD. PRECISION MEDICINE AND GENOMICS ECOSYSTEM REVENUE (USD MILLION) AND MARKET SHARE (2023-2025) | 137 |
| TABLE 31 | RECENT DEVELOPMENTS | 139 |
| TABLE 32 | METROPOLIS HEALTHCARE LTD. BASIC INFORMATION AND ITS COMPETITORS | 141 |
| TABLE 33 | METROPOLIS HEALTHCARE LTD. PRECISION MEDICINE AND GENOMICS ECOSYSTEM REVENUE (USD MILLION) AND MARKET SHARE (2023-2025) | 144 |
| TABLE 34 | RECENT DEVELOPMENTS | 146 |
| TABLE 35 | INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET REVENUE (MILLION USD) BY PLAYERS (2023-2025) | 148 |
| TABLE 36 | INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET REVENUE SHARE (%) BY PLAYERS (2023-2025) | 149 |
| TABLE 37 | TOP 3 PRECISION MEDICINE AND GENOMICS ECOSYSTEM PLAYERS MARKET SHARE | 151 |
| TABLE 38 | TOP 5 PRECISION MEDICINE AND GENOMICS ECOSYSTEM PLAYERS MARKET SHARE | 152 |
| TABLE 39 | INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET REVENUE (MILLION USD) BY TYPE (2021-2025) | 154 |
| TABLE 40 | INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET REVENUE SHARE BY TYPE (2021-2025) | 155 |
| TABLE 41 | INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET REVENUE FORECAST BY TYPE (2026-2033) | 167 |
| TABLE 42 | INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET REVENUE BY APPLICATION (2021-2025) | 170 |
| TABLE 43 | INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET REVENUE SHARE BY APPLICATION (2021-2025) | 171 |
| TABLE 44 | INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM REVENUE FORECAST BY APPLICATION (2026-2033) | 183 |
| TABLE 45 | INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET REVENUE BY REGION (2021-2025) | 185 |
| TABLE 46 | INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET REVENUE SHARE BY REGION (2021-2025) | 186 |
| TABLE 47 | INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM REVENUE FORECAST BY REGION (2026-2033) | 193 |
| TABLE 48 | INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET REVENUE (MILLION USD) FORECAST BY TYPE (2026-2033) | 195 |

| | |
|--|-----|
| TABLE 49 INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET REVENUE (MILLION USD) FORECAST BY APPLICATION (2026-2033) | 196 |
| TABLE 50 INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET REVENUE (MILLION USD) FORECAST BY REGION (2026-2033) | 197 |

List of Figures

| | |
|--|----|
| FIGURE 1 INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM REVENUE MARKET SHARE BY TYPE IN 2025 | 26 |
| FIGURE 2 PRECISION DIAGNOSTICS PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION | 27 |
| FIGURE 3 PRECISION THERAPEUTICS SUPPORT PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION | 28 |
| FIGURE 4 GENOMIC TESTING PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION | 29 |
| FIGURE 5 MULTI-OMICS TESTING PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION | 30 |
| FIGURE 6 COMPANION DIAGNOSTICS PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION | 31 |
| FIGURE 7 PHARMACOGENOMICS SOLUTIONS PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION | 32 |
| FIGURE 8 MOLECULAR ONCOLOGY AND TUMOR PROFILING PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION | 33 |
| FIGURE 9 CLINICAL BIOINFORMATICS AND INTERPRETATION PLATFORMS PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION | 34 |
| FIGURE 10 PERSONALIZED PREVENTIVE HEALTH AND WELLNESS GENOMICS PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION | 35 |
| FIGURE 11 OTHERS PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION | 36 |
| FIGURE 12 PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET SHARE BY APPLICATION IN 2025 | 38 |
| FIGURE 13 ONCOLOGY PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION | 39 |
| FIGURE 14 RARE AND INHERITED DISEASES PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION | 40 |
| FIGURE 15 CARDIOLOGY PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION | 41 |
| FIGURE 16 NEUROLOGY PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION | 42 |
| FIGURE 17 REPRODUCTIVE AND PRENATAL HEALTH PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION | 43 |
| FIGURE 18 INFECTIOUS DISEASE GENOMICS PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION | 44 |

| | | |
|-----------|--|-----|
| FIGURE 19 | METABOLIC DISORDERS PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION | 45 |
| FIGURE 20 | IMMUNOLOGY AND AUTOIMMUNE DISORDERS PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION | 46 |
| FIGURE 21 | DRUG RESPONSE AND THERAPY OPTIMIZATION PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION | 47 |
| FIGURE 22 | OTHERS PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION | 48 |
| FIGURE 23 | INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM REVENUE MARKET SHARE BY REGION IN 2025 | 49 |
| FIGURE 24 | NORTH INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION | 50 |
| FIGURE 25 | SOUTH INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION | 51 |
| FIGURE 26 | WEST INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION | 52 |
| FIGURE 27 | EAST INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION | 53 |
| FIGURE 28 | CENTRAL INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION | 54 |
| FIGURE 29 | INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET REVENUE (MILLION USD) AND GROWTH RATE (2021-2033) | 55 |
| FIGURE 30 | MEDGENOME LABS LTD. PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET SHARE (2023-2025) | 95 |
| FIGURE 31 | STRAND LIFE SCIENCES PRIVATE LIMITED PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET SHARE (2023-2025) | 100 |
| FIGURE 32 | MAPMYGENOME INDIA LTD. PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET SHARE (2023-2025) | 106 |
| FIGURE 33 | BASECARE ONCO SOLUTIONS PVT. LTD. PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET SHARE (2023-2025) | 110 |
| FIGURE 34 | CANARY ONCOCEUTICS, INC. PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET SHARE (2023-2025) | 116 |
| FIGURE 35 | REDCLIFFE LIFETECH PVT. LTD. PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET SHARE (2023-2025) | 121 |
| FIGURE 36 | HAYSTACKANALYTICS PRIVATE LIMITED PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET SHARE (2023-2025) | 126 |
| FIGURE 37 | NEUBERG DIAGNOSTICS PVT. LTD. PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET SHARE (2023-2025) | 132 |
| FIGURE 38 | DR. LAL PATHLABS LTD. PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET SHARE (2023-2025) | 138 |

| | |
|---|-----|
| FIGURE 39METROPOLIS HEALTHCARE LTD. PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET SHARE (2023-2025) | 145 |
| FIGURE 40INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET REVENUE SHARE BY PLAYERS IN 2025 | 150 |
| FIGURE 41INDIA TOP 3 PLAYERS PRECISION MEDICINE AND GENOMICS ECOSYSTEM REVENUE MARKET SHARE IN 2025 | 151 |
| FIGURE 42INDIA TOP 5 PLAYERS PRECISION MEDICINE AND GENOMICS ECOSYSTEM REVENUE MARKET SHARE IN 2025 | 152 |
| FIGURE 43INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET REVENUE SHARE BY TYPE (2021-2025) | 156 |
| FIGURE 44INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET REVENUE SHARE BY TYPE IN 2025 | 156 |
| FIGURE 45PRECISION DIAGNOSTICS PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION | 157 |
| FIGURE 46PRECISION THERAPEUTICS SUPPORT PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION | 158 |
| FIGURE 47GENOMIC TESTING PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION | 159 |
| FIGURE 48MULTI-OMICS TESTING PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION | 160 |
| FIGURE 49COMPANION DIAGNOSTICS PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION | 161 |
| FIGURE 50PHARMA GENOMICS SOLUTIONS PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION | 162 |
| FIGURE 51MOLECULAR ONCOLOGY AND TUMOR PROFILING PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION | 163 |
| FIGURE 52CLINICAL BIOINFORMATICS AND INTERPRETATION PLATFORMS PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION | 164 |
| FIGURE 53PERSONALIZED PREVENTIVE HEALTH AND WELLNESS GENOMICS PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION | 165 |
| FIGURE 54OTHERS PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION | 166 |
| FIGURE 55INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET SHARE FORECAST BY TYPE (2026-2033) | 168 |
| FIGURE 56INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM REVENUE MARKET SHARE BY APPLICATION (2021-2025) | 172 |
| FIGURE 57INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM REVENUE SHARE BY APPLICATION IN 2025 | 172 |
| FIGURE 58ONCOLOGY PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION | 173 |

| | |
|---|-----|
| FIGURE 59 RARE AND INHERITED DISEASES PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION | 174 |
| FIGURE 60 CARDIOLOGY PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION | 175 |
| FIGURE 61 NEUROLOGY PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION | 176 |
| FIGURE 62 REPRODUCTIVE AND PRENATAL HEALTH PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION | 177 |
| FIGURE 63 INFECTIOUS DISEASE GENOMICS PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION | 178 |
| FIGURE 64 METABOLIC DISORDERS PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION | 179 |
| FIGURE 65 IMMUNOLOGY AND AUTOIMMUNE DISORDERS PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION | 180 |
| FIGURE 66 DRUG RESPONSE AND THERAPY OPTIMIZATION PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION | 181 |
| FIGURE 67 OTHERS PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION | 182 |
| FIGURE 68 INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET SHARE FORECAST BY APPLICATION (2026-2033) | 184 |
| FIGURE 69 INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM REVENUE MARKET SHARE BY REGION (2021-2025) | 187 |
| FIGURE 70 INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM REVENUE SHARE BY REGION IN 2025 | 187 |
| FIGURE 71 NORTH INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION | 188 |
| FIGURE 72 SOUTH INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION | 189 |
| FIGURE 73 WEST INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION | 190 |
| FIGURE 74 EAST INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION | 191 |
| FIGURE 75 CENTRAL INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION | 192 |
| FIGURE 76 INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET SHARE FORECAST BY REGION (2026-2033) | 193 |
| FIGURE 77 INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET REVENUE (MILLION USD) AND GROWTH RATE FORECAST (2026-2033) | 194 |

1 Precision Medicine and Genomics Ecosystem Market Overview

1.1 Product Overview and Scope of Precision Medicine and Genomics Ecosystem

The Precision Medicine and Genomics Ecosystem market was valued at 2843.7 million USD in 2025 and is projected to reach 8163.7 million USD by 2033, at a CAGR of 14.2% during the forecast period.

The India precision medicine and genomics ecosystem is entering a phase of accelerated, market-shaping maturation driven by converging forces: rapidly falling sequencing and testing costs, rising clinical demand from a growing cancer and chronic disease burden, expanding private and public funding, and a vibrant startup and diagnostic-laboratory landscape. Public initiatives such as the Genome India Project, launched to build population-specific reference data, have legitimized large-scale genomic efforts and created a foundation for research-grade datasets that can be translated into diagnostics and therapeutic stratification. Commercial adoption has been strongest in oncology (tumor profiling and companion diagnostics), reproductive and rare-disease testing, and pharmacogenomics, where actionable results, physician awareness, and commercial reimbursement models align most readily. The diagnostics market remains concentrated in a few major urban centers and private tertiary hospitals, but an expanding network of accredited molecular labs, increased use of next-generation sequencing (NGS) platforms, and growing investments into bioinformatics capacity are enabling wider regional reach and more complex test offerings. Despite clear momentum, the ecosystem faces several structural constraints that temper near-term scale. India lacks a comprehensive, sector-specific reimbursement framework and national policies for routine coverage of genomic testing, which limits affordability and restricts uptake largely to out-of-pocket payers or employer-sponsored care. Data governance and privacy frameworks specific to genomic data are still evolving, the absence of a fully enacted national data-protection law and the need for clear clinical-genetics guidelines create regulatory uncertainty for both clinical laboratories and companies developing genomic-products and AI-driven decision support. Workforce and skills shortages in clinical genomics, genetic counseling, and bioinformatics remain notable bottlenecks, even as training programs and fellowship opportunities expand. Fragmentation of laboratory standards and variable adherence to accreditation norms also create inconsistent test quality perceptions among clinicians and patients. Investor interest and public-private partnerships are significant counterweights to these constraints.

Government grants, translational-funding agencies, and disease-focused philanthropic initiatives have catalyzed translational projects, while venture funding and strategic partnerships with global genomics companies have injected capital, platforms, and business models into India's ecosystem. Domestic companies are building end-to-end value chains from sample collection and sequencing to cloud-based analytics and reporting and several Indian firms have begun to pursue exports or regional leadership in South and Southeast Asia. Technological advances such as cheaper, higher-throughput sequencing, targeted panel testing, and cloud-native bioinformatics are lowering per-patient costs and shortening turnaround times, increasing the commercial viability of many precision interventions. Looking ahead, the market's expansion will likely be driven by three interrelated trends: accumulation and clinical integration of India-specific genomic reference data (improving variant interpretation and reducing variants of uncertain significance), maturation of reimbursement and regulatory clarity (boosting routine clinical use), and diffusion of genomic-enabled care pathways into oncology, cardiology, and pharmacotherapy. If these enablers advance in parallel and if investments in workforce development and equitable access models continue India's precision medicine and genomics market can transition from a high-value, niche clinical service to an embedded component of mainstream healthcare delivery, with substantial implications for disease prevention, targeted treatment, and drug-development translation within the country and the broader region.

1.2 Classification of Precision Medicine and Genomics Ecosystem by Type

India Precision Medicine and Genomics Ecosystem market is segmented by Type into Precision Diagnostics, Precision Therapeutics Support, Genomic Testing, Multi-omics Testing, Companion Diagnostics, Pharmacogenomics Solutions, Molecular Oncology and Tumor Profiling, Clinical Bioinformatics and Interpretation Platforms, Personalized Preventive Health and Wellness Genomics, and Others.

1.2.1 India Precision Medicine and Genomics Ecosystem Market Revenue Comparison by Type (2025-2033)

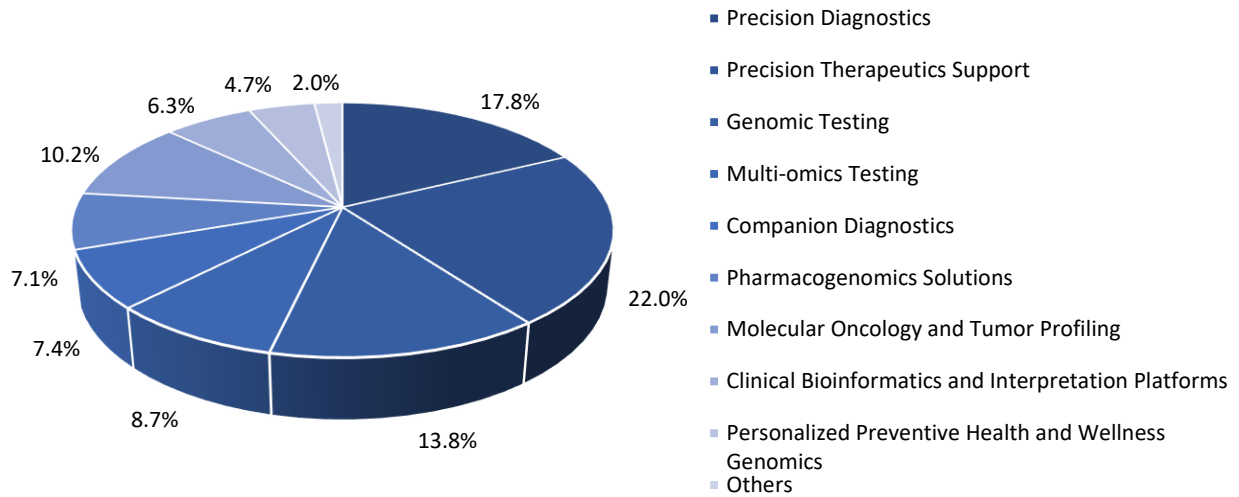
TABLE 1 INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET REVENUE (MILLION USD) SPLIT BY TYPE

| Type | 2025 | 2033 | CAGR% (2026-2033) |
|--|---------------|---------------|-------------------|
| Precision Diagnostics | 505.9 | 1347.8 | 13.1% |
| Precision Therapeutics Support | 626.8 | 1720.9 | 13.6% |
| Genomic Testing | 392.4 | 1198.4 | 15.1% |
| Multi-omics Testing | 248 | 770.7 | 15.3% |
| Companion Diagnostics | 209 | 567.4 | 13.4% |
| Pharmacogenomics Solutions | 202.5 | 600.9 | 14.7% |
| Molecular Oncology and Tumor Profiling | 290.1 | 826.2 | 14.1% |
| Clinical Bioinformatics and Interpretation Platforms | 179.7 | 607.4 | 16.5% |
| Personalized Preventive Health and Wellness Genomics | 132.8 | 400.8 | 14.9% |
| Others | 56.6 | 123.3 | 10.3% |
| Total | 2843.7 | 8163.7 | 14.2% |

Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

1.2.2 India Precision Medicine and Genomics Ecosystem Revenue Market Share by Type in 2025

FIGURE 1 INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM REVENUE MARKET SHARE BY TYPE IN 2025

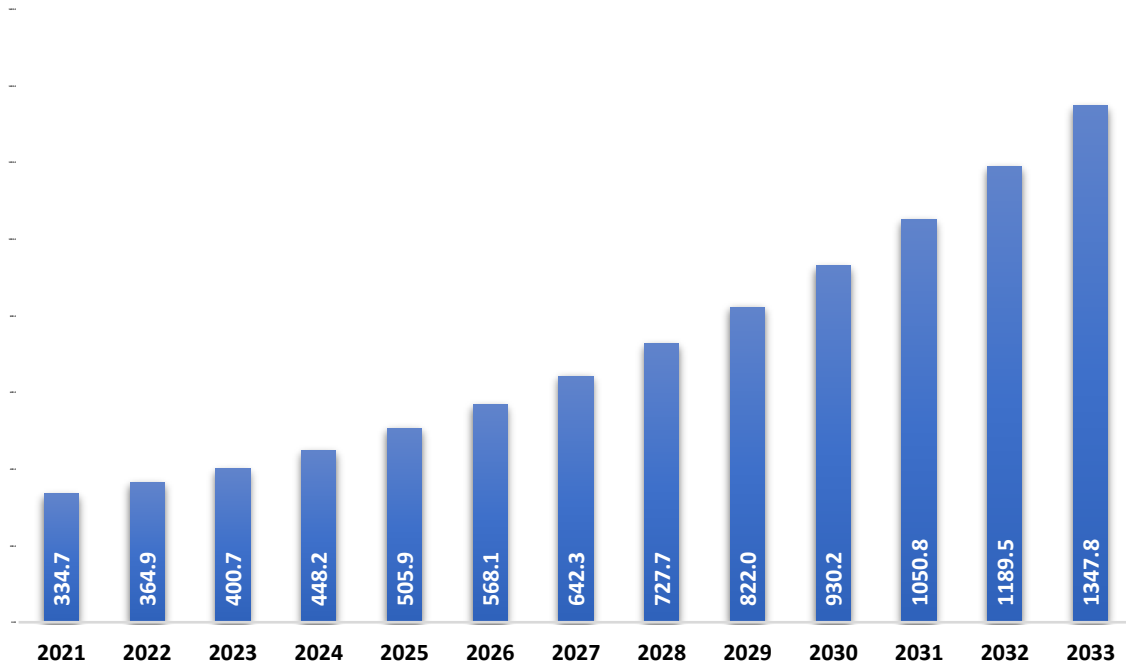


Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

1.2.3 Precision Diagnostics

The Precision Diagnostics segment was valued at USD 505.9 million in 2025 and accounted for 17.8% of Precision Medicine and Genomics Ecosystem Market in 2025. It is forecast to grow at a CAGR of 13.1% during 2026-2033 and it will be USD 1347.8 million in 2033.

FIGURE 2 PRECISION DIAGNOSTICS PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION

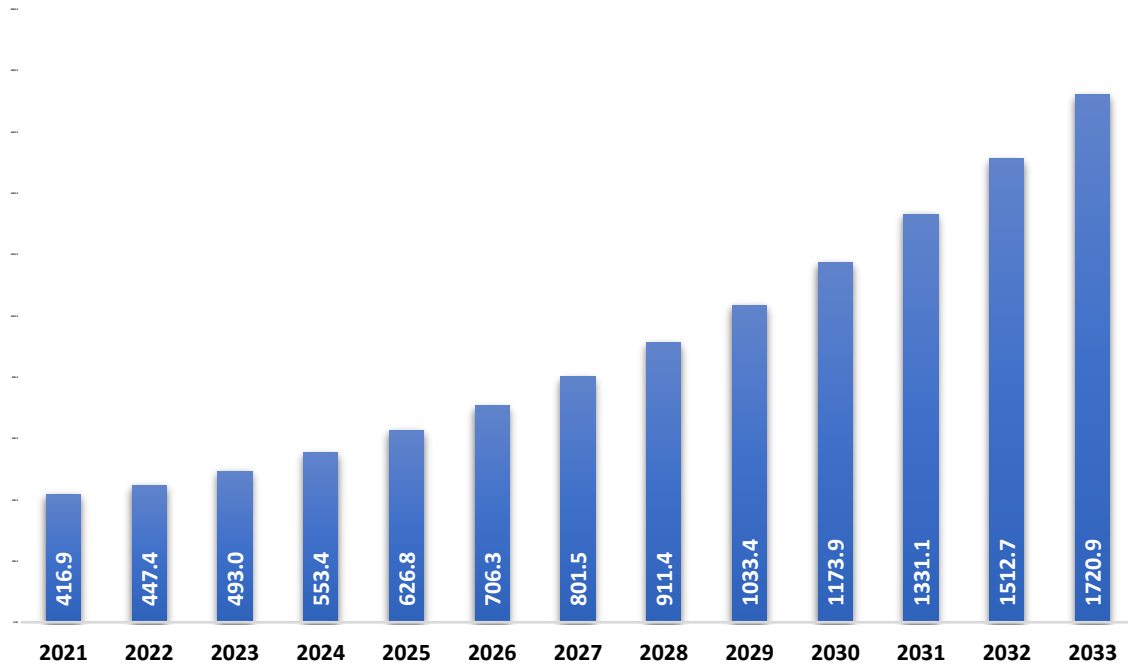


Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

1.2.4 Precision Therapeutics Support

The Precision Therapeutics Support segment was valued at USD 626.8 million in 2025 and accounted for 22% of Precision Medicine and Genomics Ecosystem Market in 2025. It is forecast to grow at a CAGR of 13.6% during 2026-2033 and it will be USD 1720.9 million in 2033.

FIGURE 3 PRECISION THERAPEUTICS SUPPORT PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION

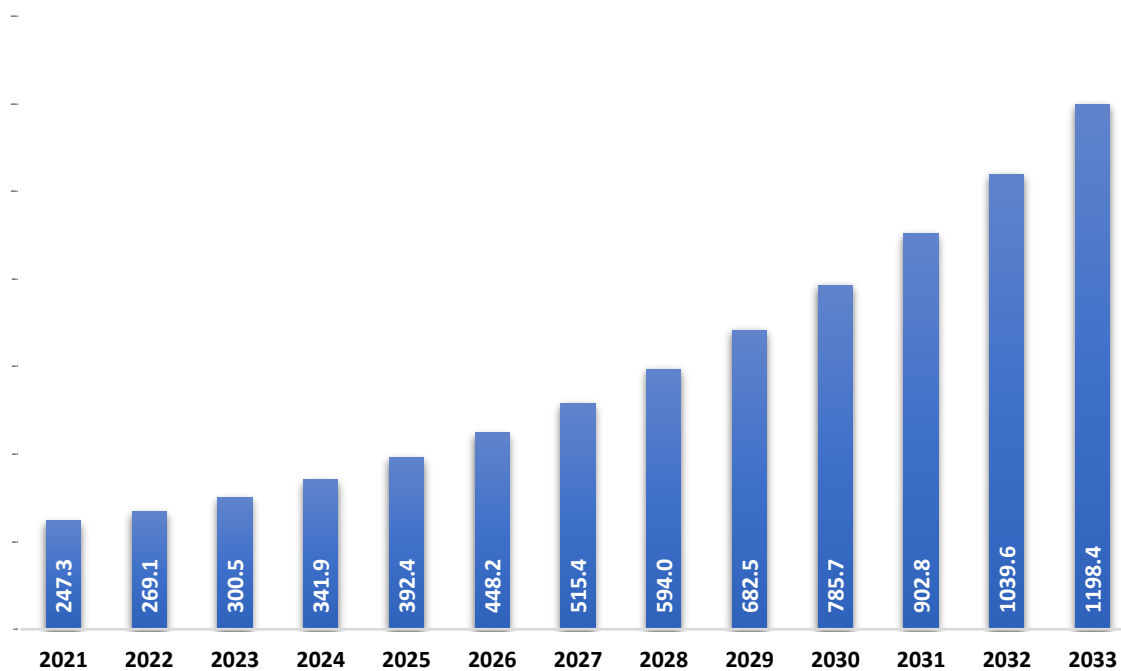


Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

1.2.5 Genomic Testing

The Genomic Testing segment was valued at USD 392.4 million in 2025 and accounted for 13.8% of Precision Medicine and Genomics Ecosystem Market in 2025. It is forecast to grow at a CAGR of 15.1% during 2026-2033 and it will be 1198.4 USD million in 2033.

FIGURE 4 GENOMIC TESTING PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION

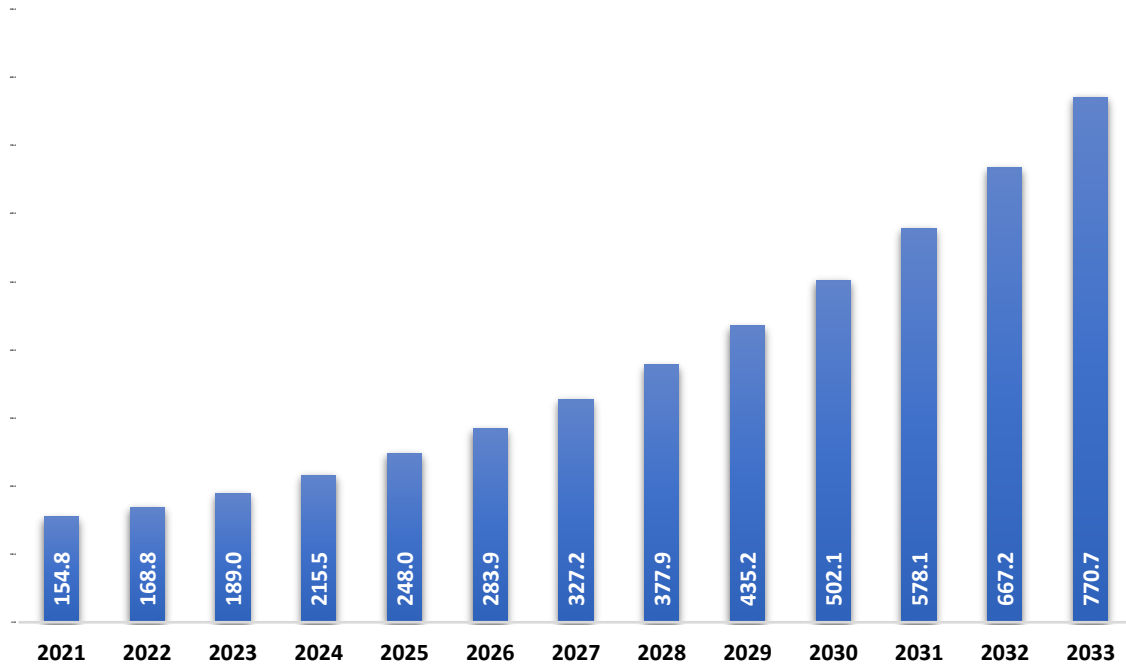


Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

1.2.6 Multi-omics Testing

The Multi-omics Testing segment was valued at USD 248 million in 2025 and accounted for 8.72% of Precision Medicine and Genomics Ecosystem Market in 2025. It is forecast to grow at a CAGR of 15.3% during 2026-2033 and it will be 770.7 USD million in 2033.

FIGURE 5 MULTI-OMICS TESTING PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION

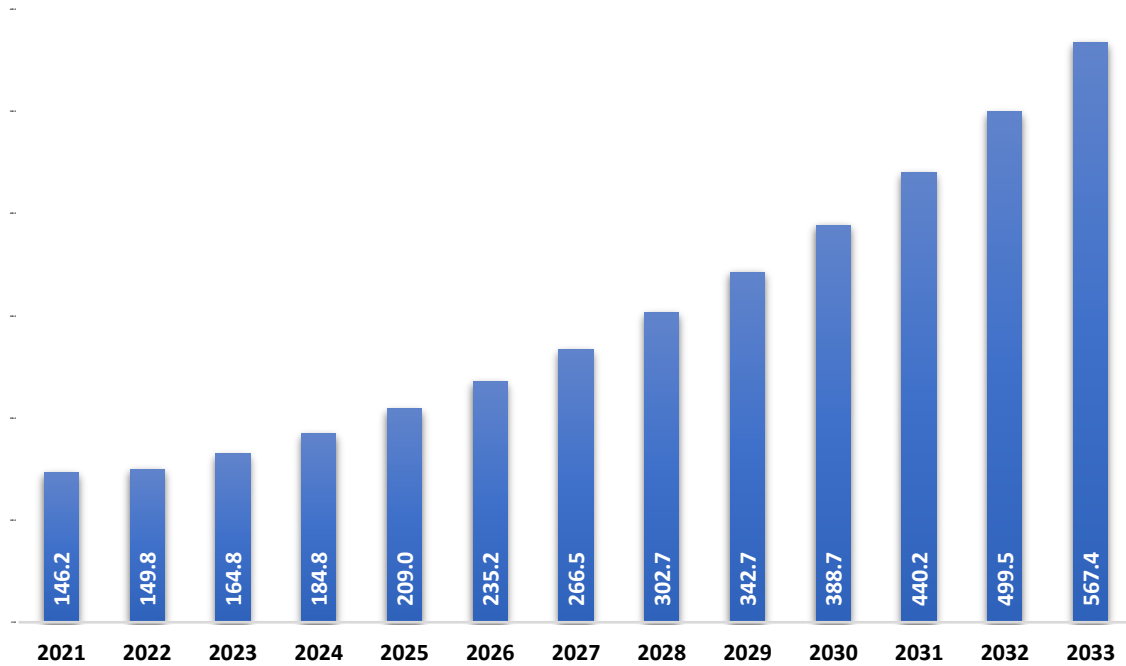


Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

1.2.7 Companion Diagnostics

The Companion Diagnostics segment was valued at USD 209 million in 2025 and accounted for 7.35% of Precision Medicine and Genomics Ecosystem Market in 2025. It is forecast to grow at a CAGR of 13.4% during 2026-2033 and it will be 567.4 USD million in 2033.

FIGURE 6 COMPANION DIAGNOSTICS PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION

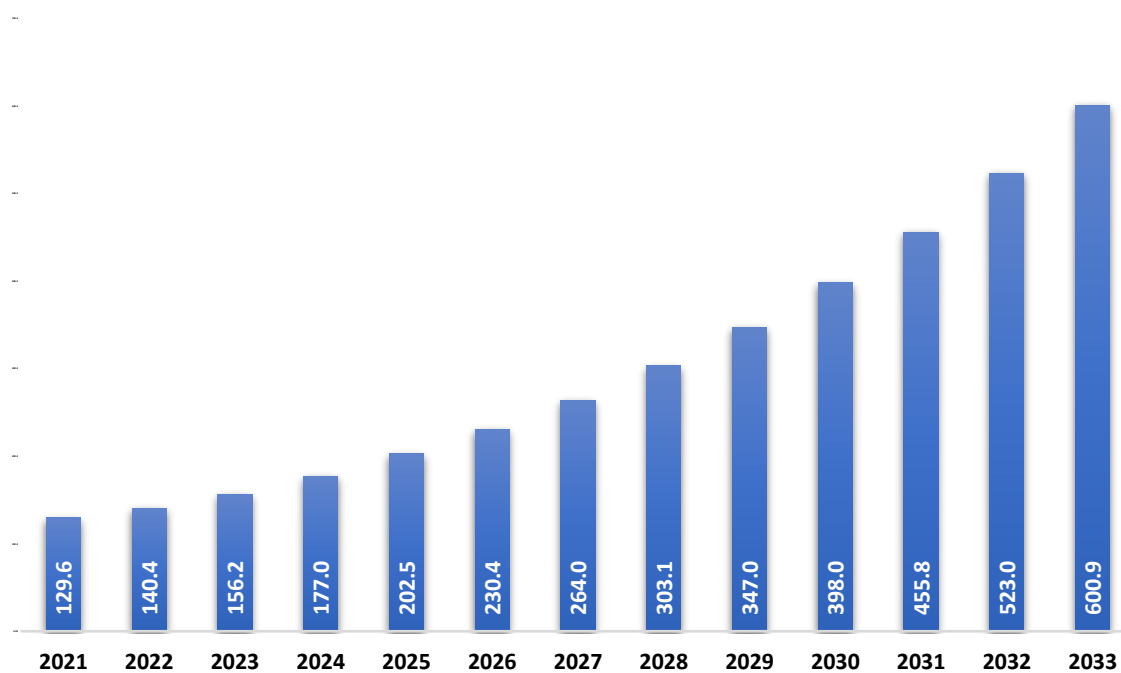


Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

1.2.8 Pharmacogenomics Solutions

The Pharmacogenomics Solutions segment was valued at USD 202.5 million in 2025 and accounted for 7.12% of Precision Medicine and Genomics Ecosystem Market in 2025. It is forecast to grow at a CAGR of 14.7% during 2026-2033 and it will be 600.9 USD million in 2033.

FIGURE 7 PHARMACOGENOMICS SOLUTIONS PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION

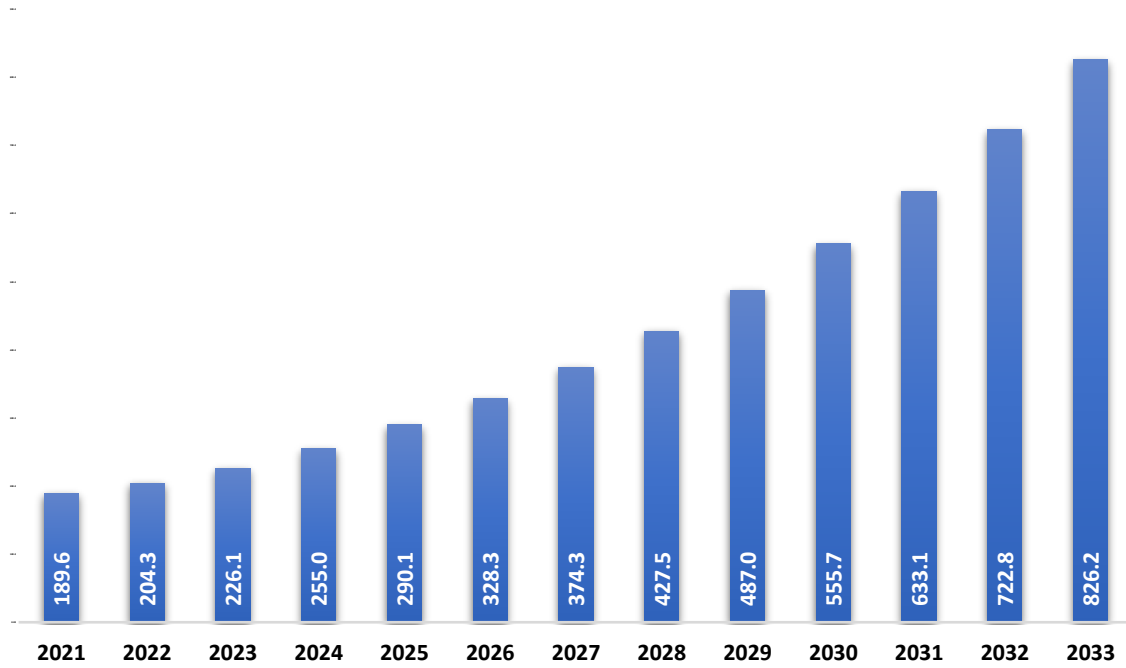


Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

1.2.9 Molecular Oncology and Tumor Profiling

The Molecular Oncology and Tumor Profiling segment was valued at USD 290.1 million in 2025 and accounted for 10.2% of Precision Medicine and Genomics Ecosystem Market in 2025. It is forecast to grow at a CAGR of 14.1% during 2026-2033 and it will be 826.2 USD million in 2033.

FIGURE 8 MOLECULAR ONCOLOGY AND TUMOR PROFILING PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION

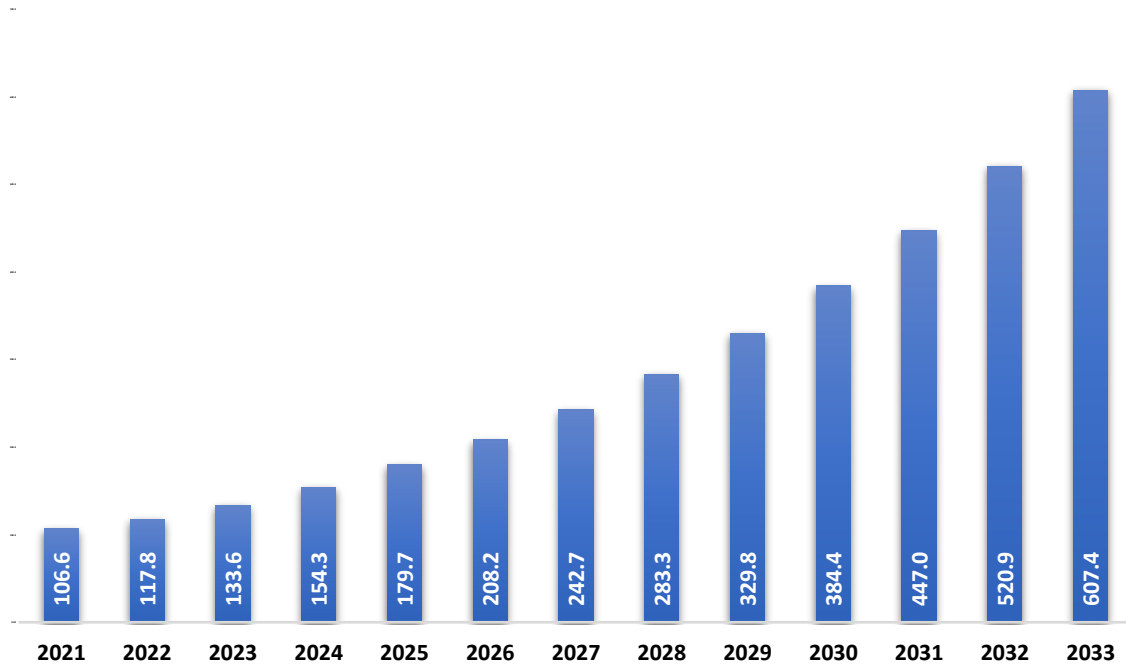


Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

1.2.10 Clinical Bioinformatics and Interpretation Platforms

The Clinical Bioinformatics and Interpretation Platforms segment was valued at USD 179.7 million in 2025 and accounted for 6.32% of Precision Medicine and Genomics Ecosystem Market in 2025. It is forecast to grow at a CAGR of 16.5% during 2026-2033 and it will be 607.4 USD million in 2033.

FIGURE 9 CLINICAL BIOINFORMATICS AND INTERPRETATION PLATFORMS PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION

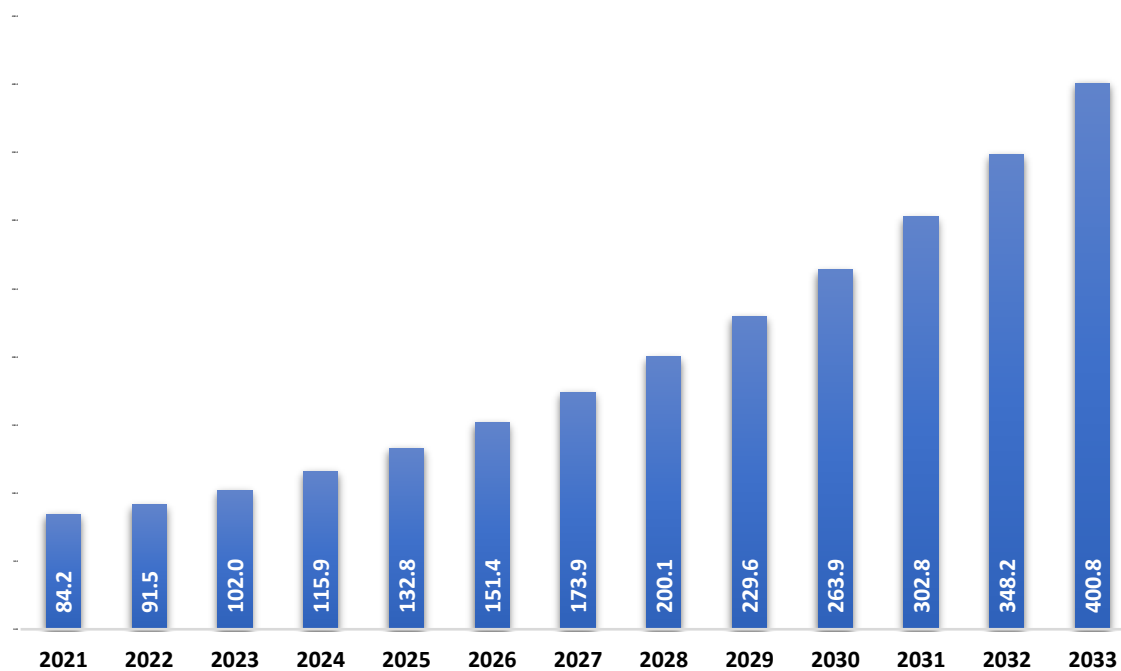


Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

1.2.11 Personalized Preventive Health and Wellness Genomics

The Personalized Preventive Health and Wellness Genomics segment was valued at USD 132.8 million in 2025 and accounted for 4.67% of Precision Medicine and Genomics Ecosystem Market in 2025. It is forecast to grow at a CAGR of 14.9% during 2026-2033 and it will be 400.8 USD million in 2033.

FIGURE 10 PERSONALIZED PREVENTIVE HEALTH AND WELLNESS GENOMICS PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION

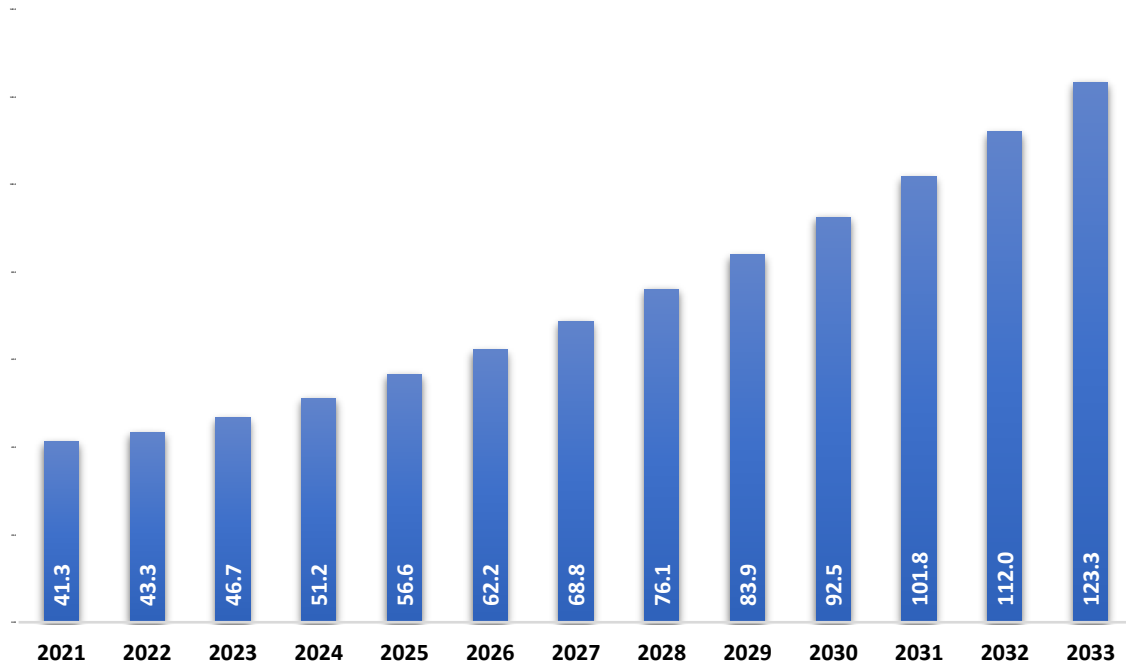


Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

1.2.12 Others

The Others segment was valued at USD 56.6 million in 2025 and accounted for 1.99% of Precision Medicine and Genomics Ecosystem Market in 2025. It is forecast to grow at a CAGR of 10.3% during 2026-2033 and it will be 123.3 USD million in 2033.

FIGURE 11 OTHERS PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION



Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

1.3 India Precision Medicine and Genomics Ecosystem Market by Application

India Precision Medicine and Genomics Ecosystem is segmented by Application into Oncology, Rare and Inherited Diseases, Cardiology, Neurology, Reproductive and Prenatal Health, Infectious Disease Genomics, Metabolic Disorders, Immunology and Autoimmune Disorders, Drug Response and Therapy Optimization, Others.

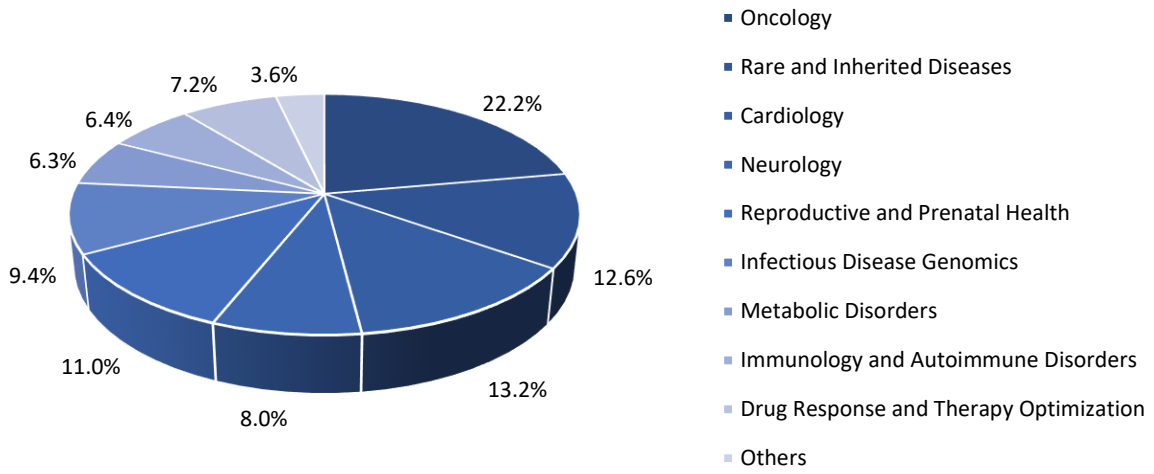
1.3.1 India Precision Medicine and Genomics Ecosystem Market Size and Market Share Comparison by Application (2025-2033)

TABLE 2 INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM REVENUE (USD MILLION) BY APPLICATION (2025-2033)

| Application | 2025 | 2033 | CAGR% (2026-2033) |
|--|---------------|---------------|-------------------|
| Oncology | 631 | 1739.7 | 13.6% |
| Rare and Inherited Diseases | 358.3 | 1093.9 | 15.1% |
| Cardiology | 376.2 | 1047.4 | 13.8% |
| Neurology | 228.6 | 662.9 | 14.3% |
| Reproductive and Prenatal Health | 312.8 | 937.2 | 14.8% |
| Infectious Disease Genomics | 268.2 | 822.1 | 15.1% |
| Metabolic Disorders | 177.7 | 464.5 | 12.9% |
| Immunology and Autoimmune Disorders | 183.1 | 532.3 | 14.4% |
| Drug Response and Therapy Optimization | 204.7 | 627 | 15.1% |
| Others | 102.9 | 236.7 | 11% |
| Total | 2843.7 | 8163.7 | 14.2% |

Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

FIGURE 12 PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET SHARE BY APPLICATION IN 2025

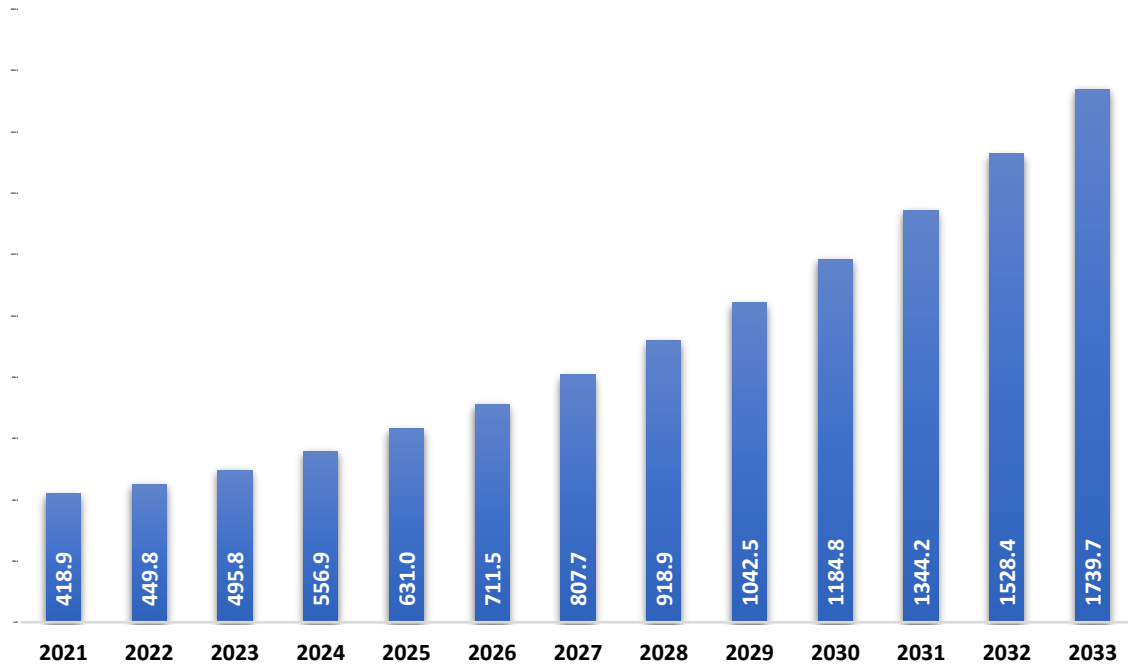


Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

1.3.2 Oncology

The Oncology segment was valued at USD 631 million in 2025 and accounted for 22.2% of Precision Medicine and Genomics Ecosystem Market in 2025. It is forecast to grow at a CAGR of 13.6% during 2026-2033 and it will be 1739.7 USD million in 2033.

FIGURE 13 ONCOLOGY PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION

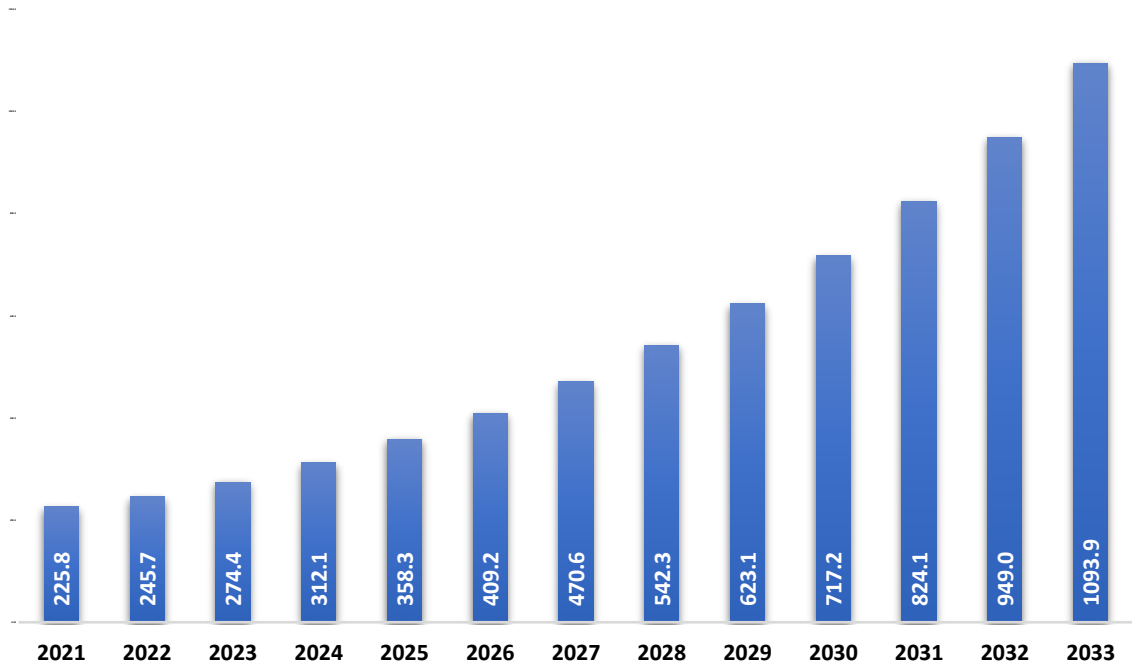


Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

1.3.3 Rare and Inherited Diseases

The Rare and Inherited Diseases segment was valued at USD 358.3 million in 2025 and accounted for 12.6% of Precision Medicine and Genomics Ecosystem Market in 2025. It is forecast to grow at a CAGR of 15.1% during 2026-2033 and it will be 1093.9 USD million in 2033.

FIGURE 14 RARE AND INHERITED DISEASES PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION

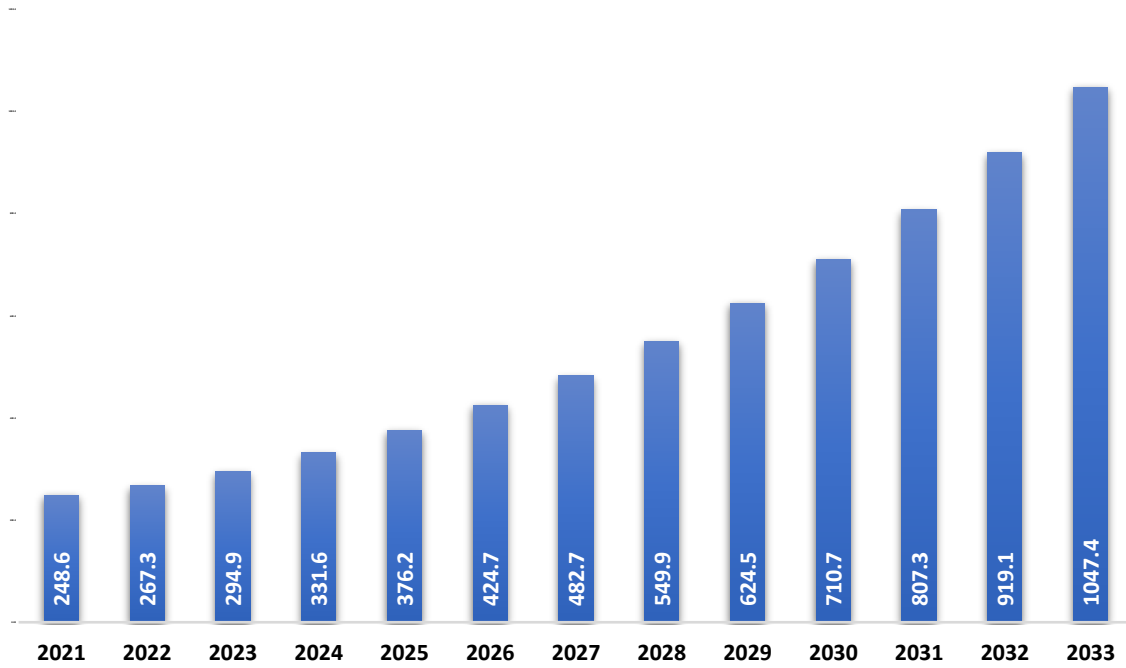


Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

1.3.4 Cardiology

The Cardiology segment was valued at USD 376.2 million in 2025 and accounted for 13.2% of Precision Medicine and Genomics Ecosystem Market in 2025. It is forecast to grow at a CAGR of 13.8% during 2026-2033 and it will be 1047.4 USD million in 2033.

FIGURE 15 CARDIOLOGY PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION

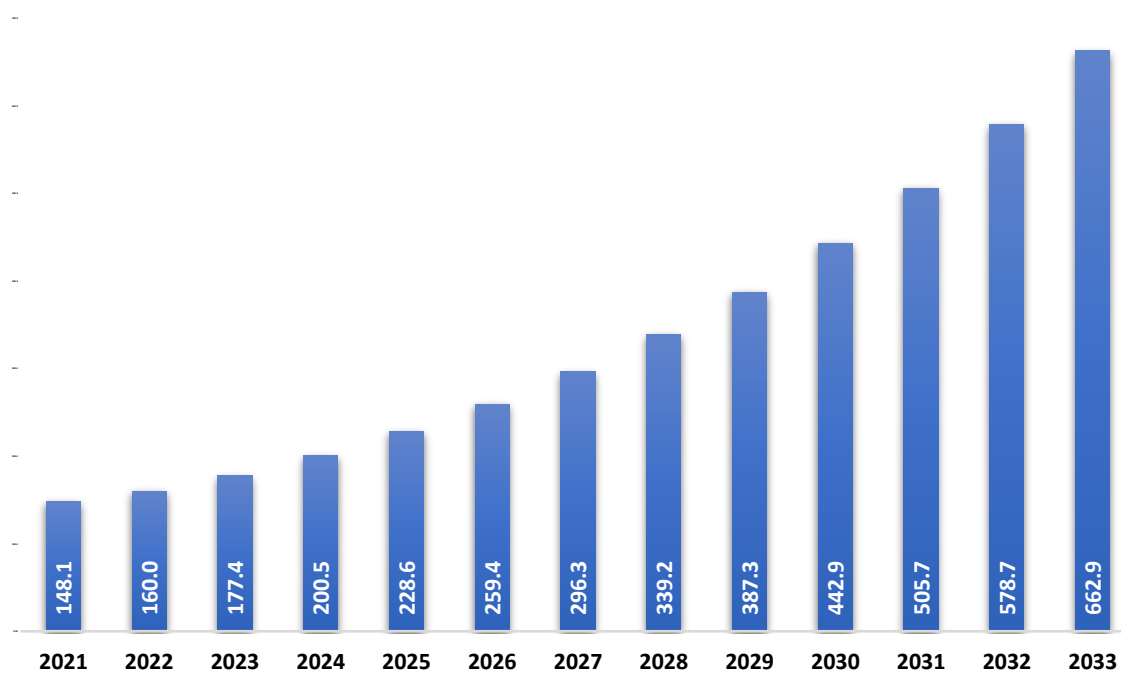


Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

1.3.5 Neurology

The Neurology segment was valued at USD 228.6 million in 2025 and accounted for 8.04% of Precision Medicine and Genomics Ecosystem Market in 2025. It is forecast to grow at a CAGR of 14.3% during 2026-2033 and it will be 662.9 USD million in 2033.

FIGURE 16 NEUROLOGY PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION

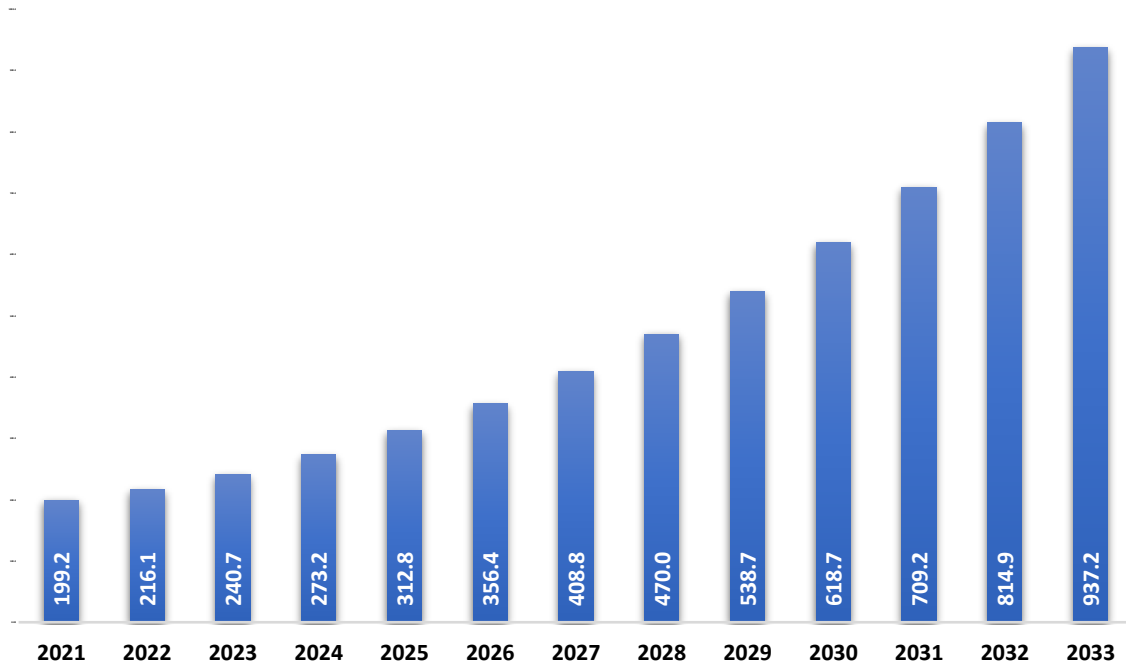


Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

1.3.6 Reproductive and Prenatal Health

The Reproductive and Prenatal Health segment was valued at USD 312.8 million in 2025 and accounted for 11% of Precision Medicine and Genomics Ecosystem Market in 2025. It is forecast to grow at a CAGR of 14.8% during 2026-2033 and it will be 937.2 USD million in 2033.

FIGURE 17 REPRODUCTIVE AND PRENATAL HEALTH PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION

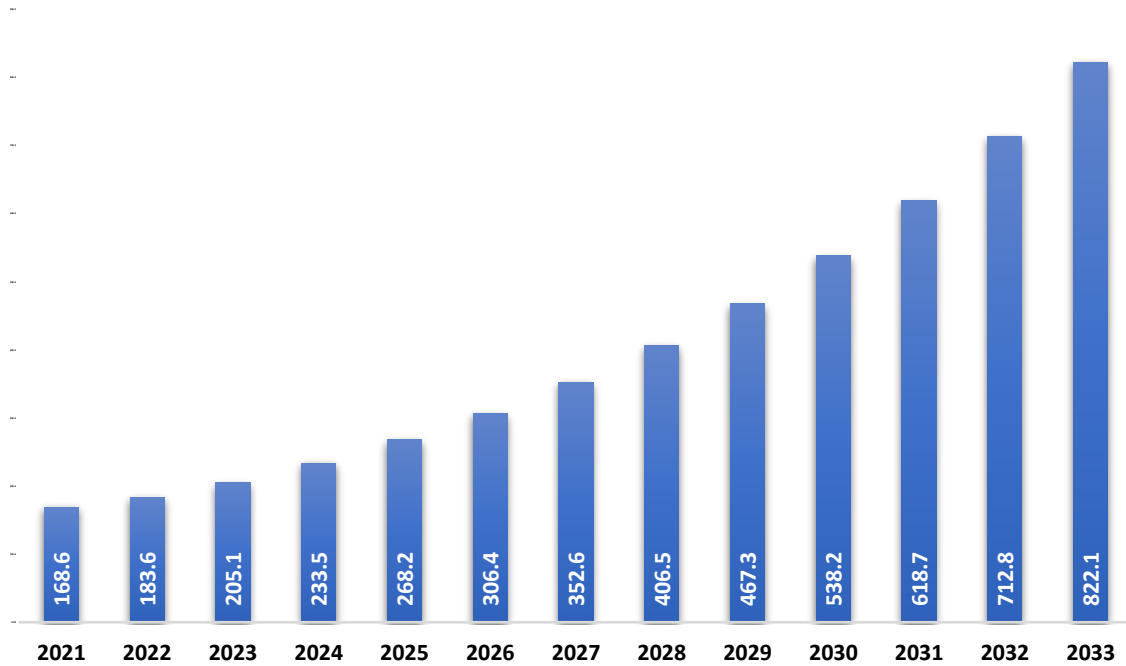


Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

1.3.7 Infectious Disease Genomics

The Infectious Disease Genomics segment was valued at USD 268.2 million in 2025 and accounted for 9.43% of Precision Medicine and Genomics Ecosystem Market in 2025. It is forecast to grow at a CAGR of 15.1% during 2026-2033 and it will be 822.1 USD million in 2033.

FIGURE 18 INFECTIOUS DISEASE GENOMICS PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION

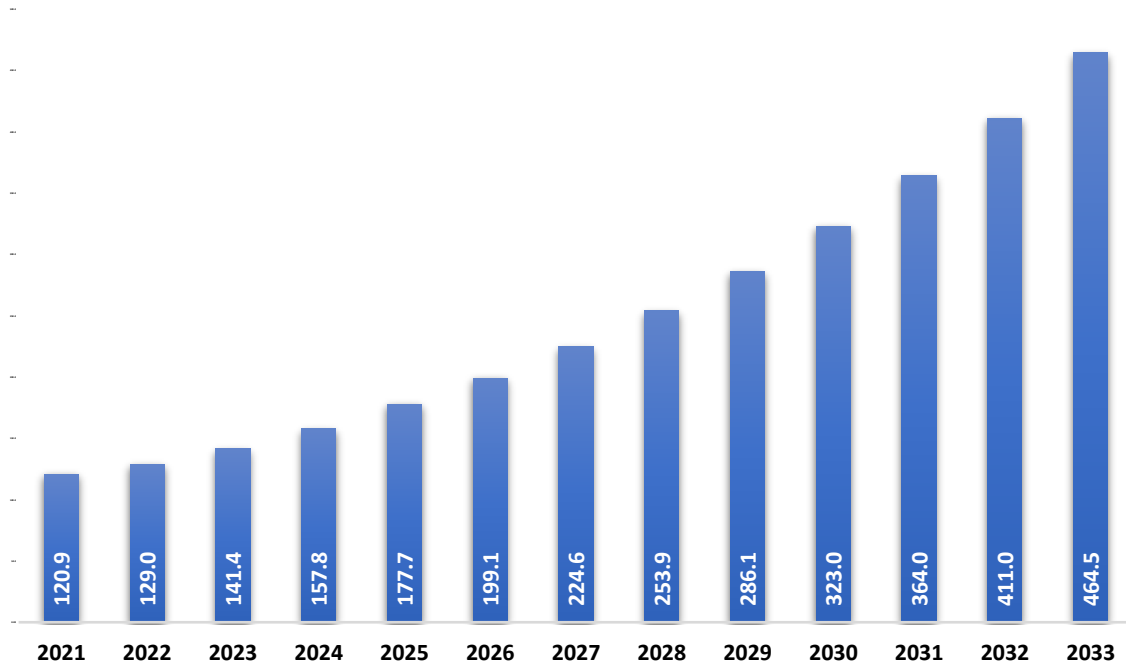


Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

1.3.8 Metabolic Disorders

The Metabolic Disorders segment was valued at USD 177.7 million in 2025 and accounted for 6.25% of Precision Medicine and Genomics Ecosystem Market in 2025. It is forecast to grow at a CAGR of 12.9% during 2026-2033 and it will be 464.5 USD million in 2033.

FIGURE 19 METABOLIC DISORDERS PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION

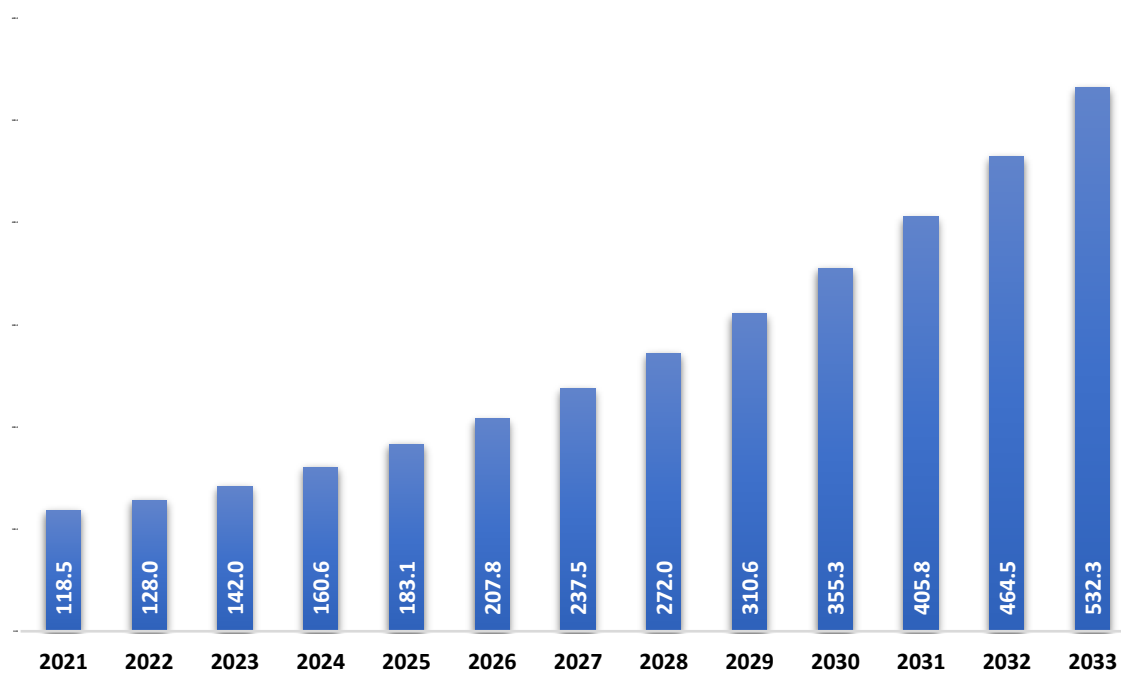


Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

1.3.9 Immunology and Autoimmune Disorders

The Immunology and Autoimmune Disorders segment was valued at USD 183.1 million in 2025 and accounted for 6.44% of Precision Medicine and Genomics Ecosystem Market in 2025. It is forecast to grow at a CAGR of 14.4% during 2026-2033 and it will be 532.3 USD million in 2033.

FIGURE 20 IMMUNOLOGY AND AUTOIMMUNE DISORDERS PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION

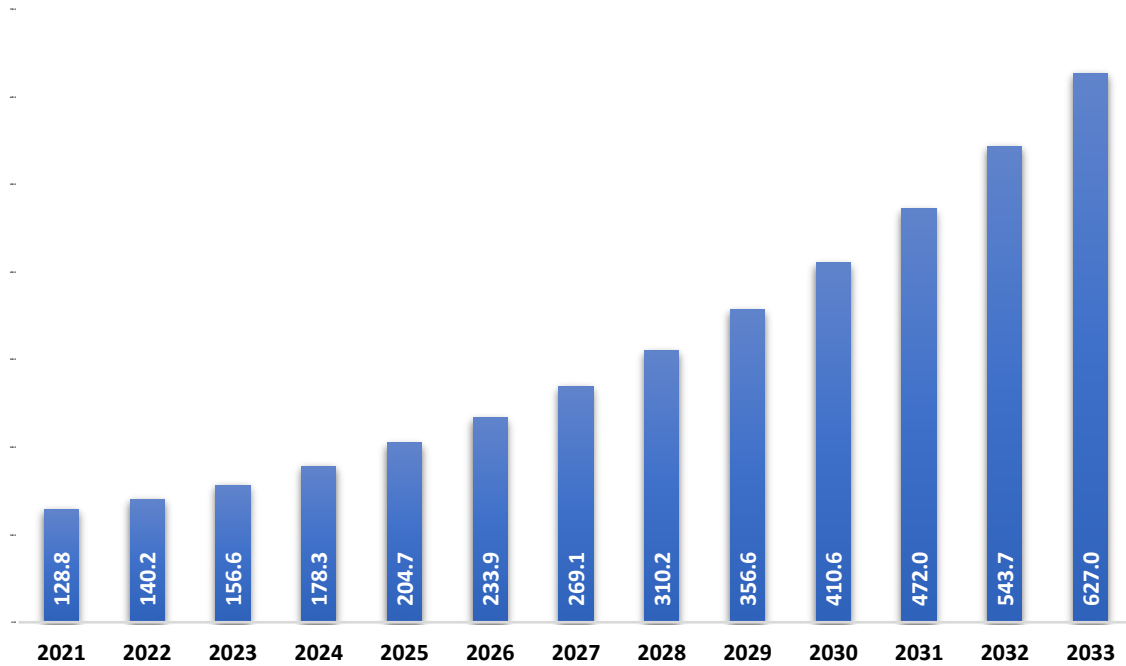


Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

1.3.10 Drug Response and Therapy Optimization

The Drug Response and Therapy Optimization segment was valued at USD 204.7 million in 2025 and accounted for 7.2% of Precision Medicine and Genomics Ecosystem Market in 2025. It is forecast to grow at a CAGR of 15.1% during 2026-2033 and it will be 627 USD million in 2033.

FIGURE 21 DRUG RESPONSE AND THERAPY OPTIMIZATION PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION

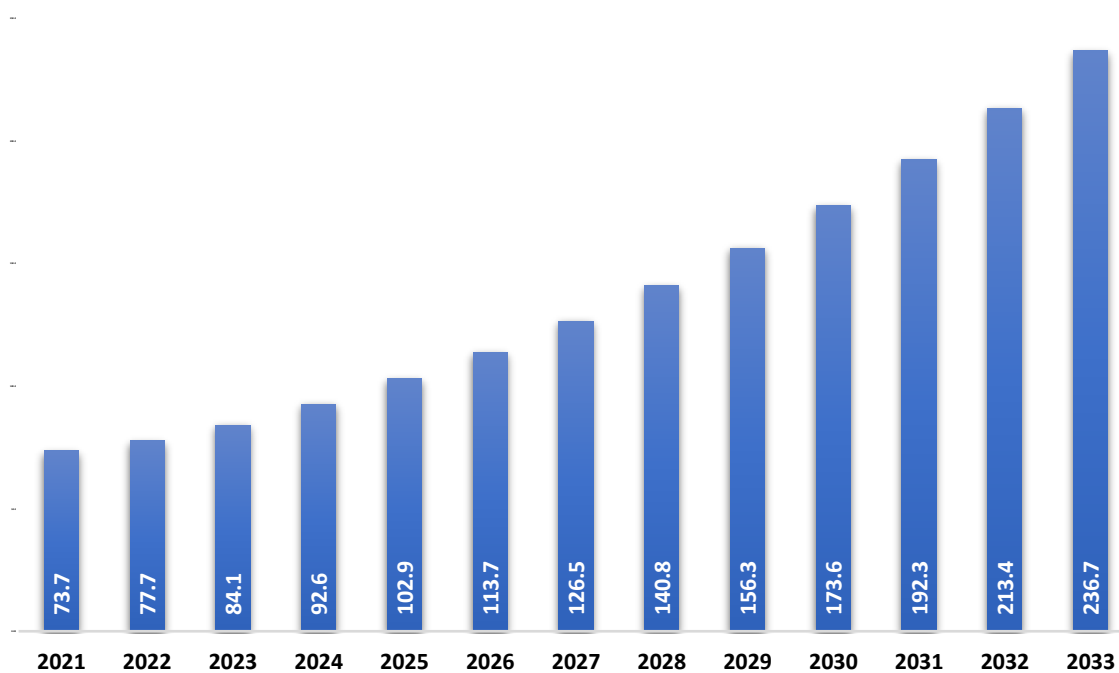


Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

1.3.11 Others

The Others segment was valued at USD 102.9 million in 2025 and accounted for 3.62% of Precision Medicine and Genomics Ecosystem Market in 2025. It is forecast to grow at a CAGR of 11% during 2026-2033 and it will be 236.7 USD million in 2033.

FIGURE 22 OTHERS PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION



Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

1.4 Classification of Precision Medicine and Genomics Ecosystem by Region

India Precision Medicine and Genomics Ecosystem is segmented by Region into North India, South India, West India, East India, Central India.

1.4.1 India Precision Medicine and Genomics Ecosystem Market Revenue Comparison by Region (2025-2033)

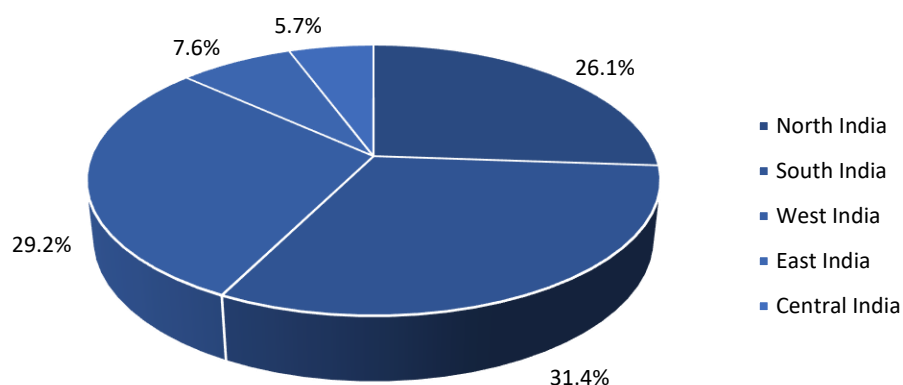
TABLE 3 INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET REVENUE (MILLION USD) SPLIT BY REGION

| Region | 2025 | 2033 | CAGR% (2026-2033) |
|---------------|---------------|---------------|-------------------|
| North India | 742.5 | 2105.4 | 14% |
| South India | 891.5 | 2598.5 | 14.4% |
| West India | 831.2 | 2549.5 | 15.1% |
| East India | 217.3 | 545.3 | 12.3% |
| Central India | 161.2 | 364.9 | 10.8% |
| Total | 2843.7 | 8163.7 | 14.2% |

Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

1.4.2 India Precision Medicine and Genomics Ecosystem Revenue Market Share by Region in 2025

FIGURE 23 INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM REVENUE MARKET SHARE BY REGION IN 2025

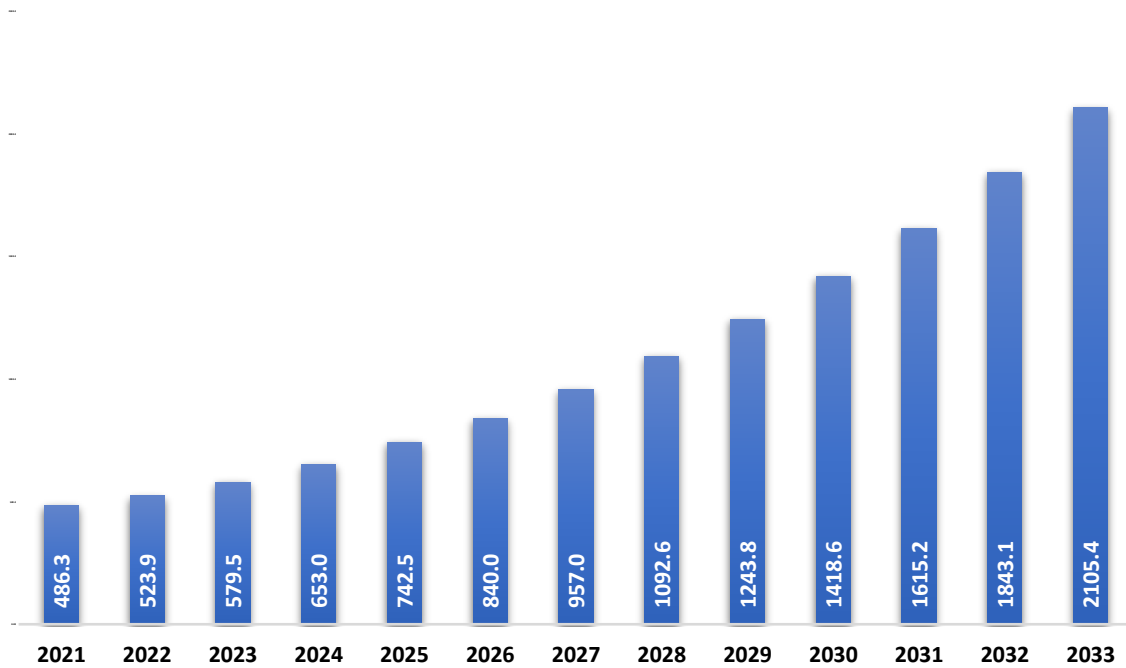


Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

1.4.3 North India

The North India segment was valued at USD 742.5 million in 2025 and accounted for 26.1% of Precision Medicine and Genomics Ecosystem Market in 2025. It is forecast to grow at a CAGR of 14% during 2026-2033 and it will be 2105.4 USD million in 2033.

FIGURE 24 NORTH INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION

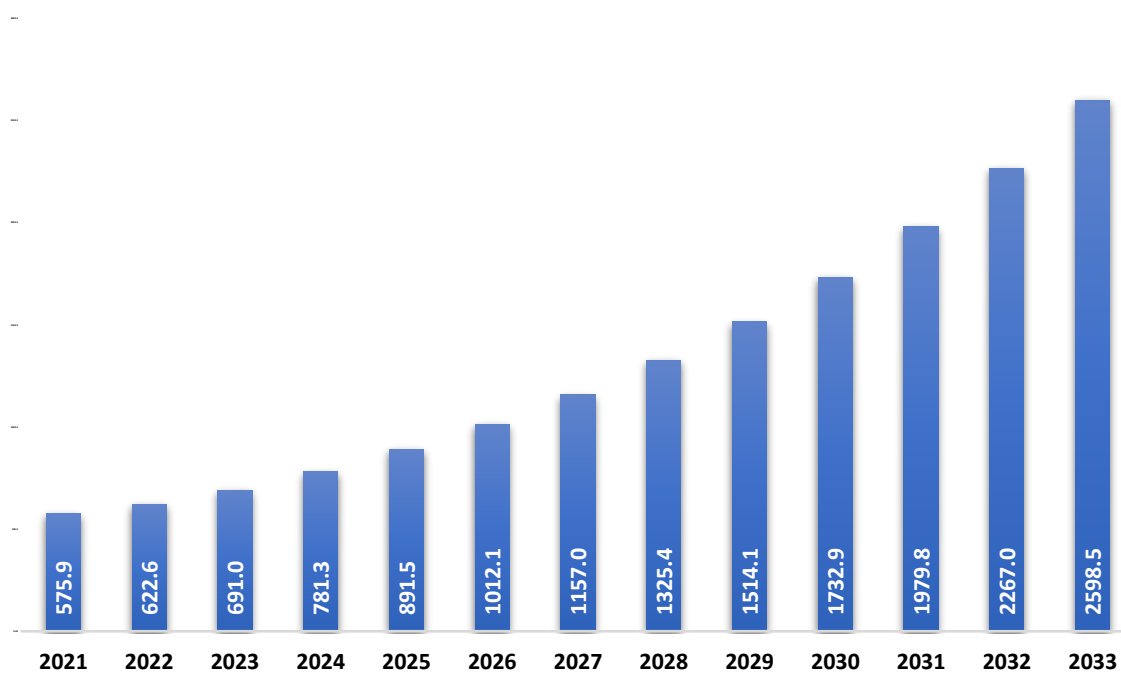


Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

1.4.4 South India

The South India segment was valued at USD 891.5 million in 2025 and accounted for 31.4% of Precision Medicine and Genomics Ecosystem Market in 2025. It is forecast to grow at a CAGR of 14.4% during 2026-2033 and it will be 2598.5 USD million in 2033.

FIGURE 25 SOUTH INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION

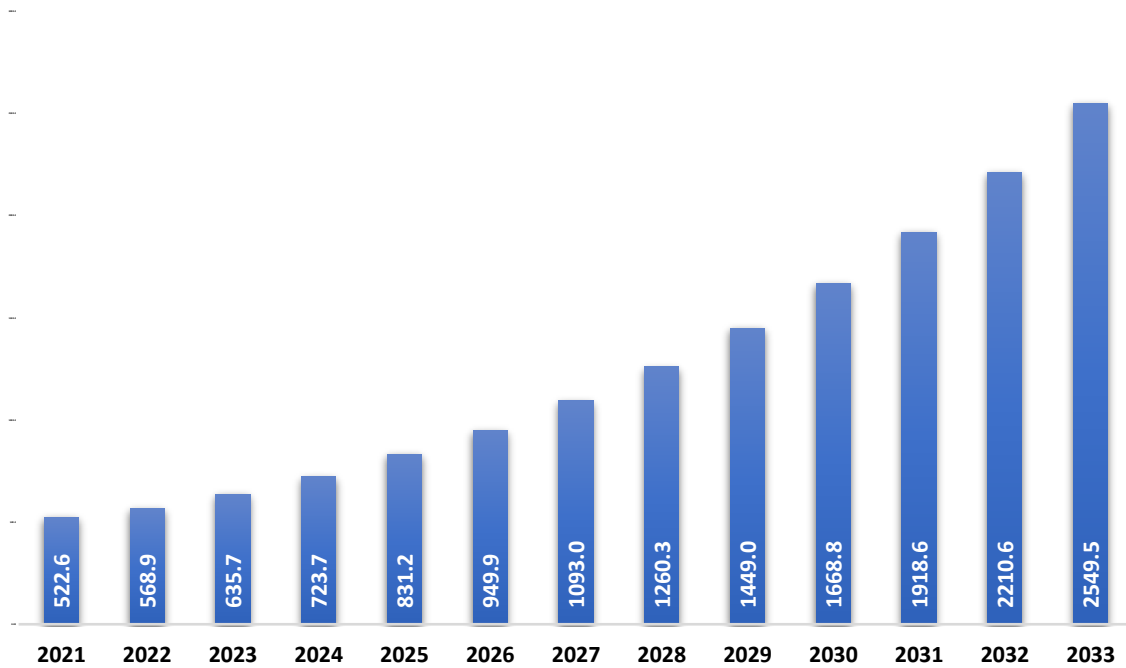


Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

1.4.5 West India

The West India segment was valued at USD 831.2 million in 2025 and accounted for 29.2% of Precision Medicine and Genomics Ecosystem Market in 2025. It is forecast to grow at a CAGR of 15.1% during 2026-2033 and it will be 2549.5 USD million in 2033.

FIGURE 26 WEST INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION

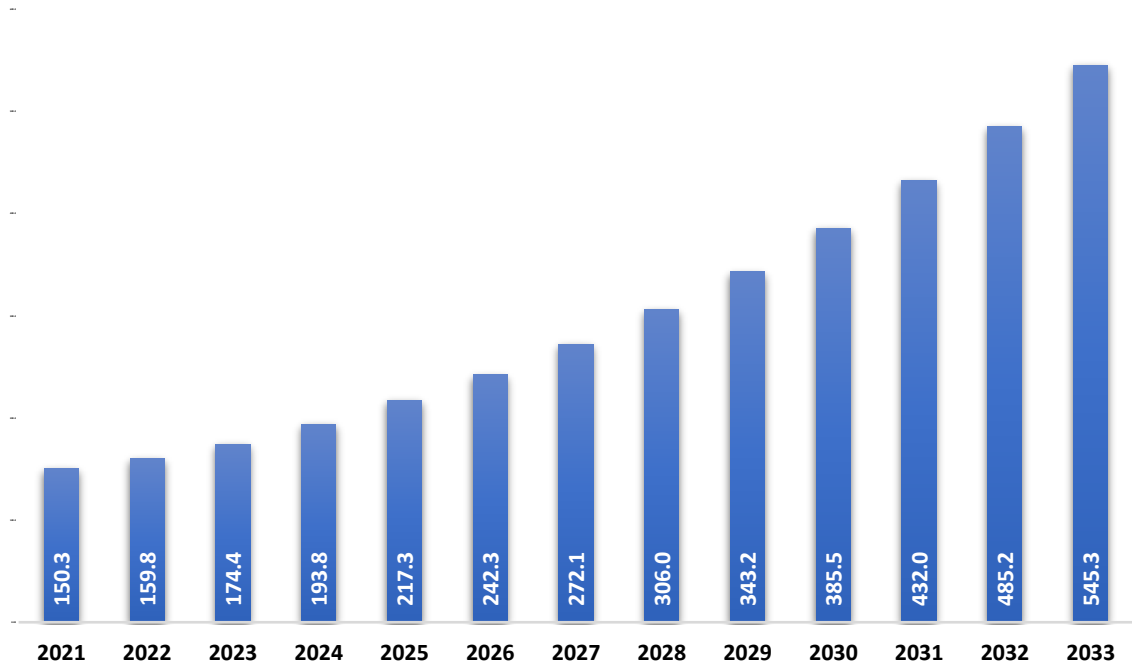


Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

1.4.6 East India

The East India segment was valued at USD 217.3 million in 2025 and accounted for 7.64% of Precision Medicine and Genomics Ecosystem Market in 2025. It is forecast to grow at a CAGR of 12.3% during 2026-2033 and it will be 545.3 USD million in 2033.

FIGURE 27 EAST INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION

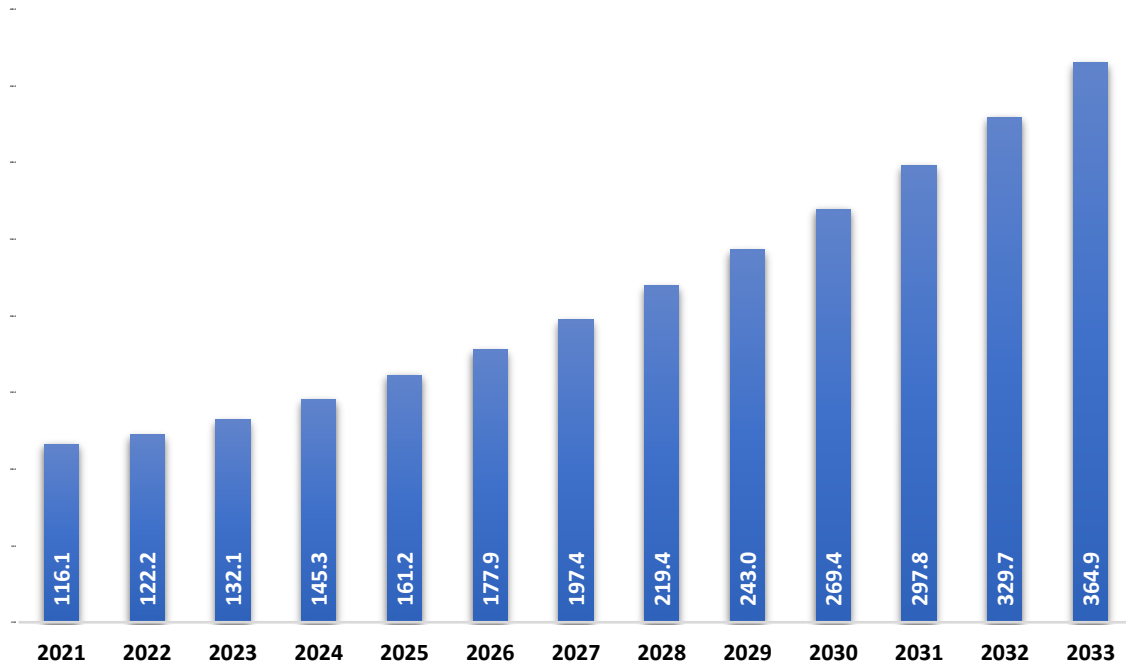


Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

1.4.7 Central India

The Central India segment was valued at USD 161.2 million in 2025 and accounted for 5.67% of Precision Medicine and Genomics Ecosystem Market in 2025. It is forecast to grow at a CAGR of 10.8% during 2026-2033 and it will be 364.9 USD million in 2033.

FIGURE 28 CENTRAL INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION

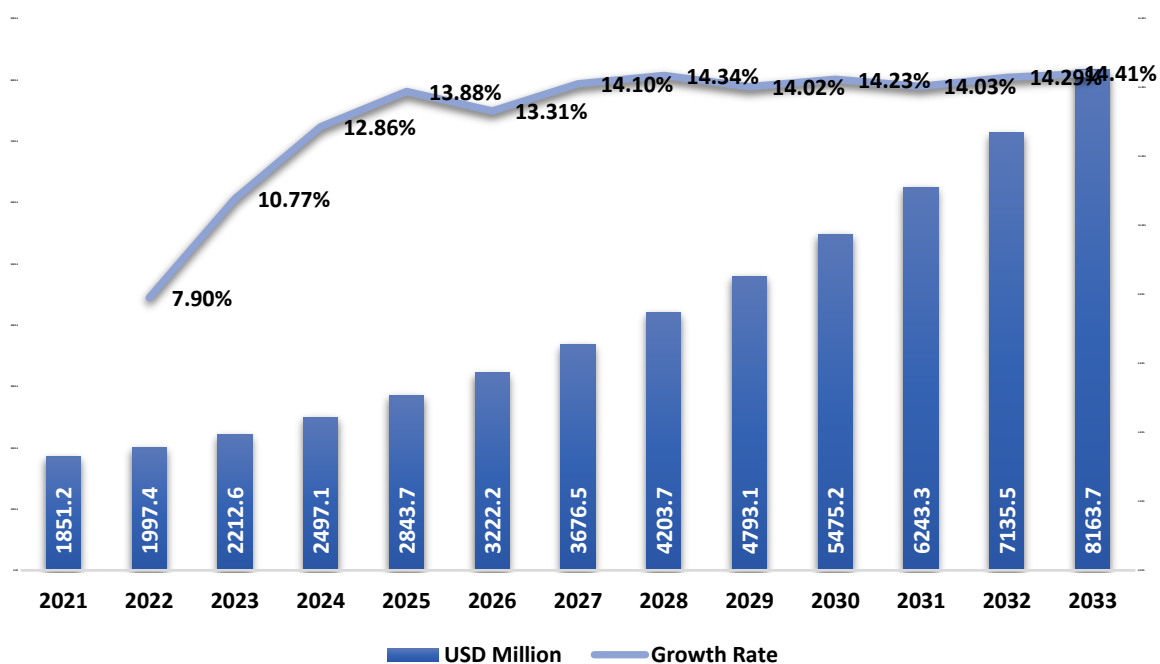


Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

1.5 India Market Size of Precision Medicine and Genomics Ecosystem (2021-2033)

The Precision Medicine and Genomics Ecosystem market was valued at USD 2843.7 million in 2025 and is projected to reach USD 8163.7 million by 2033, at a CAGR of 14.2% during the forecast period.

FIGURE 29 INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET REVENUE (MILLION USD) AND GROWTH RATE (2021-2033)



Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

2 Market Dynamics

2.1 Market Drivers

2.1.1 Government-backed initiatives such as GenomeIndia and DBT genomics infrastructure are expanding India-specific genomic datasets and strengthening the base for precision diagnostics and targeted care.

Government-backed initiatives such as GenomeIndia and expanded Department of Biotechnology (DBT) genomics infrastructure are rapidly reshaping India's precision medicine and genomics ecosystem by building the population-specific genomic data, laboratory capacity, and translational pathways that industry, clinicians, and researchers need to deliver targeted diagnostics and personalized care. By coordinating multi-institutional sequencing efforts and investing in high-throughput sequencing centers, bioinformatics platforms, biorepositories and training programs, these initiatives are filling critical gaps in India-specific reference datasets and variant annotation resources enabling more accurate interpretation of genetic tests for Indian ancestry groups and reducing reliance on non-representative global databases. That improved data foundation accelerates the development and regulatory validation of indigenously designed companion diagnostics, pharmacogenomic tests, and biomarker-driven clinical trials, while de-risking private-sector R&D and attracting partnerships between domestic companies and multinational firms. Simultaneously, public investment in shared infrastructure and workforce development is lowering barriers to entry for smaller diagnostics and biotech firms, shortening time-to-market for precision assays and enabling wider clinical adoption across both urban and tier-2/3 settings. Collectively, these government-led efforts strengthen the end-to-end ecosystem from sample collection and data governance to clinical implementation thereby serving as a powerful market driver for growth in India's precision medicine and genomics sector.

2.1.2 ABDM-led digital health interoperability, along with rising use of NGS, liquid biopsy, AI, and molecular diagnostics, is accelerating precision-health deployment across care settings.

Ayushman Bharat Digital Mission (ABDM)-led digital health interoperability is unlocking the technical and regulatory scaffolding that transforms isolated genomic and diagnostic results into actionable, longitudinal patient records accessible across primary, secondary and tertiary care settings, and this interoperability, combined with rapid adoption of next-generation sequencing (NGS), expanding use of liquid biopsy, advances in molecular diagnostics, and deployment of AI-driven analytics, is accelerating the pace at which precision-health becomes a routine part of clinical care across India. By standardizing identifiers, consent management and data-exchange protocols, the Ayushman Bharat Digital Mission reduces friction for integrating genomics reports, molecular assay outputs and imaging-derived biomarkers into electronic health records and clinical workflows, enabling clinicians to correlate genomic variants with phenotypes, select targeted therapies, and monitor response at the point of care. Concurrently, falling costs and higher throughput from NGS platforms and the rise of minimally invasive liquid biopsy assays are broadening access to tumor and germline profiling beyond specialized centers into city- and district-level laboratories, creating more timely, repeatable molecular data streams that feed clinical decision-making and population-level variant databases. AI and machine-learning tools accelerate interpretation of complex genomic and multiomic datasets prioritizing actionable variants, predicting drug response or resistance, and integrating multimodal inputs (genomics, pathology, radiology, clinical notes) to generate clinician-facing insights thereby shortening time-to-diagnosis and improving treatment personalization. Molecular diagnostics innovation, including point-of-care and multiplexed assays, complements sequencing by enabling rapid, context-specific testing (e.g., pharmacogenomics, companion diagnostics) that supports therapy selection in outpatient and inpatient settings. Together these elements create a reinforcing ecosystem, interoperable digital infrastructure enables scalable data aggregation and consented research (amplified by national genomics initiatives), richer molecular testing modalities supply the data, and AI adds interpretive scale driving commercial and clinical adoption of precision medicine across oncology, rare disease, infectious disease surveillance and pharmacogenomics. The result is a maturing India precision-medicine and genomics ecosystem characterized by new business models (diagnostic platform partnerships, virtual tumor boards, hybrid lab digital services), faster clinical translation of genomic discoveries, and expanding patient access, while also surfacing critical near-term challenges data governance, privacy, workforce training, standardization of assays and reimbursement pathways that policy and industry players must address to realize the full benefits of precision health at scale.

2.2 Market Restraints

2.2.1 High testing and therapy costs, technical complexity, and the need for advanced laboratories and skilled personnel continue to restrict large-scale adoption.

High testing and therapy costs, together with substantial technical complexity and the need for advanced laboratory infrastructure and highly skilled personnel, present a major barrier to scaling precision medicine and genomics across India. Although sequencing technologies and targeted therapies have become more powerful, the up-front capital expenditure for clinical-grade sequencers, validated sample-processing platforms, cold-chain logistics, and secure data-storage systems remains prohibitive for many hospitals and regional diagnostic centers, recurring consumable and reagent costs, plus expenses for clinical-grade bioinformatics pipelines and long-term data curation, further raise the per-patient price of genomic testing. On the therapy side, many precision drugs and companion diagnostics are priced well beyond the reach of large segments of the population and are unevenly reimbursed or not covered by public schemes, creating affordability and equity gaps. Implementing genomic workflows also requires multidisciplinary teams, molecular technologists, clinical geneticists, genetic counselors, bioinformaticians, and IT specialists whose numbers are limited in India and who command premium compensation; the scarcity of trained personnel constrains both throughput and geographic reach. Also, stringent clinical validation, regulatory compliance, and the need for quality-assured accreditation add time and cost before tests or treatments can be routinely offered, discouraging smaller laboratories and hospitals from investing. Together, these financial, technical, workforce and regulatory challenges slow adoption beyond metropolitan tertiary centers and reduce the pace at which precision medicine can benefit India's broader patient population.

2.2.2 Limited Indian genotype-phenotype reference databases, uneven infrastructure, and gaps in clinician awareness for variant interpretation slow broader clinical integration.

Limited Indian genotype-phenotype reference datasets, uneven infrastructure, and gaps in clinician awareness for variant interpretation together form a significant, interconnected restraint on the growth of India's precision medicine and genomics ecosystem. Because global reference resources and variant databases remain heavily skewed toward European ancestries, many variants observed in Indian patients cannot be reliably classified using existing population frequencies and phenotype correlations, this increases the proportion of variants of uncertain significance (VUS), undermines diagnostic confidence, and raises the risk of both false positives and false negatives in clinical interpretation. The paucity of large, well-curated Indian sequence phenotype cohorts means that population-specific pathogenicity signals, founder variants, and benign polymorphisms remain undercharacterized, limiting utility of genomic tests for pharmacogenomics, cancer risk stratification, and rare-disease diagnosis. Compounding the data deficit is an uneven distribution of sequencing, bioinformatics, and clinical genetics capacity- high-throughput sequencing centers, trained molecular diagnosticians, and bioinformatics expertise are concentrated in a few metropolitan research hubs, while many tertiary and district hospitals lack the laboratory infrastructure, secure data-management systems, and referral pathways needed to incorporate genomic results into routine care. This infrastructural imbalance increases turnaround times, constrains local validation of assays, and inhibits the generation of clinically annotated Indian datasets. Equally important, many frontline clinicians and specialists receive limited training in genomic medicine and variant interpretation, so even when test results are available, they may not be integrated into management decisions or communicated effectively to patients, the shortage of certified genetic counselors and standardized clinical genomics training pathways exacerbates this gap. Together, these factors create a cycle in which scarce, underannotated data and limited clinician confidence dampen clinician and institutional demand for genomic testing, which in turn reduces incentives to invest in broader data-generation, workforce development, and interoperable infrastructure slowing adoption of precision medicine across the Indian health system and limiting the market expansion of genomics products and services. Addressing this restraint requires coordinated investment in representative Indian reference databases, regional sequencing and bioinformatics capacity, and scalable clinician education and counseling services so that genomic findings can be interpreted accurately, equitably, and at scale.

2.3 Market Opportunities

2.3.1 Development of India-specific biomarker panels, genomic chips, and clinico-genomic data platforms creates a strong opportunity to lower costs, improve local validation, and scale precision oncology and preventive genomics.

Development of India-specific biomarker panels, genomic chips, and integrated clinic genomic data platforms represents a decisive market opportunity that can materially lower costs, accelerate local validation, and scale precision oncology and preventive genomics across the subcontinent. India's extraordinary genetic diversity and the historic under representation of South Asian genomes in global reference datasets mean that bespoke biomarker panels and genotyping arrays designed from Indian population data will yield higher diagnostic sensitivity and specificity off-the-shelf, globally-tuned assays; this drives better clinical utility in oncology panels (tumor profiling, actionable somatic variants) and in preventive risk screens (pharmacogenomics, cancer risk loci, cardiometabolic predispositions). Because focused panels and custom genotyping chips require far less sequencing depth and analysis overhead than comprehensive whole genome approaches, they allow payers and providers to deliver clinically actionable results at a fraction of the cost of WGS, opening precision tools to wider patient volumes and enabling routine use in oncology workflows and population screening programs. When linked to robust clinico-genomic platforms that harmonize electronic medical records, pathology, imaging, and annotated outcomes, India-specific genomic assays become exponentially more valuable. They enable rapid local clinical validation of biomarkers, facilitate real-world evidence generation for regulatory and payer acceptance, and support iterative refinement of panels so they remain relevant as new variants and signatures are discovered. This creates a virtuous commercial cycle locally validated panels lower downstream diagnostic and therapeutic costs, which increases adoption and generates richer Indian datasets, which in turn enable further optimization of chips and algorithms. For precision oncology specifically, such platforms can reduce time to an actionable diagnosis, improve matching to targeted therapies or trials, and help stratify patients for cost effective treatment pathways. For preventive genomics, population calibrated risk scores and pharmacogenomic markers can be embedded into primary care or employer health programs, shifting investment upstream toward risk reduction and monitoring rather than late-stage interventions. The market impact is broad. Indian biotech and diagnostics companies, hospitals, and digital health platforms can capture value by co-developing assays, licensing curated population panels, and offering integrated clinico-genomic services to both domestic and regional markets.

Public-private partnerships and national initiatives to sequence Indian genomes create a supportive data infrastructure and regulatory impetus for commercialization, while the large and growing cancer burden and rising chronic disease prevalence in India ensure substantial clinical demand. Moreover, solutions built to meet India's cost sensitivity-low-cost, high-throughput assays, streamlined sample logistics, and cloud-native analysis with local language reporting are exportable to other emerging markets and to diasporic populations globally, expanding addressable market size beyond national borders. Realizing this opportunity requires investment in three linked areas: generation and curation of high quality, consented Indian clinico-genomic datasets, development of population aware assay design and analytical pipelines and deployment of interoperable data platforms that respect privacy, enable regulatory compliance, and integrate with clinical workflows. Companies that can combine genomics, clinical informatics, and payer-oriented outcomes evidence will be best positioned to commercialize India specific panels and platforms at scale. In short, India tuned biomarker panels, genomic chips, and clinico genomic ecosystems offer a pathway to deliver affordable, validated precision oncology and preventive genomics at population scale creating a substantive, sustainable market opportunity for innovators, providers, and policymakers across the India precision medicine and genomics ecosystem.

2.4 Porter's Five Forces Analysis

2.4.1 Threat of New Entrants: Moderate

New entry remains feasible across niche layers such as bioinformatics services, targeted panels, clinical decision support, and specialist interpretation networks, supported by cloud tooling and modular partnerships. Entry barriers rise sharply for scaled clinical genomics laboratories and end-to-end precision medicine platforms, owing to accreditation expectations for medical laboratories, robust quality systems, and ethics-led handling of genetic testing and screening in human participants. Data governance requirements under India's Digital Personal Data Protection Act and the operationalisation via DPDP Rules add another compliance layer for entities processing digital personal data tied to genomic testing and longitudinal patient records.

2.4.2 Bargaining Power of Suppliers: Moderate to High

Supplier power trends moderate to high, shaped by reliance on a limited set of global platforms for sequencing instruments, chemistry, reagents, and workflow automation, alongside proprietary analytics ecosystems tied to these platforms. Platform economics anchored in consumables and validated workflows increase switching friction for laboratories once installed base, QC thresholds, and reporting pipelines are standardised. Automation-led systems that integrate sample processing, sequencing, informatics, and reporting also reinforce supplier leverage by bundling multiple workflow steps into a single validated stack.

2.4.3 Bargaining Power of Buyers: Moderate to High

Buyer power is moderate to high since procurement concentration is rising across hospital chains, diagnostic networks, pharma sponsors, and enterprise health platforms that negotiate on price, turnaround time, report depth, and service SLAs. Payer and employer-led health programmes intensify scrutiny on clinical utility, evidence thresholds, and measurable outcomes. National digital health rails under Ayushman Bharat Digital Mission and policy emphasis on privacy-by-design elevate expectations around interoperability, consent, and longitudinal health record handling, strengthening buyer influence around governance, auditability, and data portability in addition to price.

2.4.4 Threat of Substitutes: Moderate

Substitution pressure remains moderate since many care pathways still rely on conventional diagnostics such as biochemistry, immunoassays, imaging, histopathology, and single-marker tests that deliver acceptable clinical decisions at lower complexity. In oncology and rare disease pathways, targeted testing, empirical therapy selection, and phenotype-led diagnostic workflows act as functional substitutes when genomic testing is perceived as non-essential or when evidence and reimbursement are limited. Substitution also occurs within genomics via lower-cost targeted panels replacing broader approaches when clinical questions are narrow and well-defined.

2.4.5 Competitive Rivalry: High

Competitive rivalry is high across diagnostic chains, hospital labs, genomics-first players, and healthtech platforms competing on test menu breadth, interpretation quality, clinician engagement, turnaround time, and pricing. Differentiation increasingly hinges on clinical-grade reporting, variant curation depth, evidence linkage, counselling integration, and compliance posture spanning accreditation, ethics, and data protection. Publicly funded genomics initiatives and biobanking efforts strengthen reference datasets and research depth, which supports new offerings yet also increases competitive intensity by enabling faster productisation of population-relevant insights.

2.5 SWOT Analysis

2.5.1 Strengths

Large, genetically diverse population: India's population diversity is a major scientific advantage for discovery of population specific variants, pharmacogenomic markers and disease associations that have high translational value globally.

Scale and clinical need: High disease burden (infectious and noncommunicable) and large patient volumes enable rapid cohort development, real-world evidence generation and cost-efficient clinical studies.

Growing private and academic capacity: A rising number of domestic genomics companies, diagnostic labs, CROs and strong research institutes (e.g., genomics groups in CSIR, ICMR institutions, academic centers) provide talent, infrastructure and translational pipelines.

Cost competitiveness: Lower operating and labor costs relative to many Western markets make India attractive for sequencing services, bioinformatics and clinical testing.

Enabling digital infrastructure: Initiatives such as the Ayushman Bharat Digital Mission (digital health ID/records) and improving broadband/mobile penetration facilitate data capture, remote testing and tele-genetics.

Technology diffusion: Wider availability of next generation sequencing, microarrays, gene panels, and growing bioinformatics capabilities enable broader clinical and research applications.

2.5.2 Weaknesses

Fragmented clinical integration: Genomic testing is unevenly integrated into routine care. Many clinicians lack genomic literacy and clinical workflows for result interpretation are immature.

Limited population-scale, well annotated databases: Although projects exist, India lacks a comprehensive, richly annotated national reference database across all subpopulations, hampering variant interpretation and utility.

Regulatory and policy gaps: Data/privacy governance, biospecimen regulation, and standardized genomic testing guidelines remain inconsistent or under development, creating uncertainty for clinicians, companies and investors.

Variable lab quality and accreditation: Clinical-grade sequencing and diagnostic accreditation are inconsistent across labs, and standardization and quality assurance need strengthening.

Workforce constraints: Shortage of trained clinical geneticists, genetic counselors, bioinformaticians and regulatory specialists constrains scale-up and clinical adoption.

Reimbursement and cost barriers for patients: Limited public reimbursement and low awareness of the value proposition reduce uptake of preventive and targeted genomic tests.

2.5.3 Opportunities

Population specific discovery to global translation: Building high-quality reference cohorts and variant catalogs can enable India to lead discovery of clinically actionable, population specific biomarkers and therapeutics.

Pharmacogenomics and precision prescribing: Implementing pharmacogenomic testing especially where actionable variants are common can reduce adverse drug reactions and improve outcomes in large patient cohorts.

Rare disease diagnosis and newborn screening: Affordable genomic diagnostics can materially reduce diagnostic odysseys and enable early intervention. This could be a public health priority with high social ROI.

Export services and research partnerships: India can expand as a cost-effective sequencing, bioinformatics and clinical research hub for global pharma, diagnostics and academic collaborations.

AI/ML-enabled value add: Integrating machine learning on genomic + clinical + digital health data can create differentiated diagnostic, predictive and therapeutic decision support products.

Public-private partnerships: Scaling genomic infrastructure through consortia (government, hospitals, startups, pharma) can accelerate database creation, standards adoption and clinical translation.

2.5.4 Threats

Data privacy and misuse risks: Absence of robust, trusted data governance and consent frameworks risks breaches, misuse, surveillance concerns and public backlash that could undermine participation.

Regulatory uncertainty and restrictive policies: Sudden or ambiguous regulation around genetic data export, testing approvals or commercialization could slow investments and collaboration.

International competition: Well-funded genomic hubs (US, China, EU) and private firms may outcompete Indian players for talent, partnerships and market share, particularly in high value clinical segments.

Quality related reputational risk: Misdiagnoses, unvalidated tests, or poor lab practices could damage trust and invite harsh regulation.

Capital intensity and margin compression: Building clinical-grade, accredited infrastructure and maintaining regulatory compliance is capital intensive, and price competition may compress margins for domestic providers.

3 Harley of London India and MyCare 360: Positioning within India's Emerging Precision Medicine Ecosystem

3.1 HOLNESS Framework and Precision Health Positioning

India's precision medicine and genomics ecosystem is evolving into a more connected and execution-oriented landscape, supported by national genomic research, digital health infrastructure, and formal data governance mechanisms. GenomeIndia has established a strong scientific base by sequencing 10,000 whole genomes across 83 diverse Indian populations and by building a broader biological sample base for future research. In parallel, India's digital health ecosystem has expanded rapidly through Ayushman Bharat Digital Mission, strengthening the foundation for interoperable health records, digital identities, and consent-based data exchange across the care continuum.

The HOLNESS Framework stands out as a precision health model that connects genomic science with practical care delivery. Its relevance lies in organizing precision medicine around an integrated pathway that combines biological insight, clinical interpretation, preventive risk assessment, patient monitoring, and treatment optimization. That positioning is highly relevant in India, where the market is shifting from isolated diagnostic outputs toward coordinated care models that link testing, interpretation, and longitudinal patient management. Government communications in 2026 have also reinforced the national push toward personalized and precision medicine driven by genomics, AI, and biotechnology, which strengthens the strategic fit of such a framework within the country's healthcare direction.

MyCare 360 gains importance as the digital execution layer of this framework. Precision health requires a platform environment that does not stop at reporting genomic findings, but instead integrates diagnostics, clinical workflows, patient history, physician engagement, and follow-up pathways in one coordinated architecture. India's digital public health infrastructure already provides a meaningful backbone for that model. According to official government updates, ABDM had reached 68.97 crore ABHA accounts, 3.49 lakh registered health facilities, 5.23 lakh registered healthcare professionals, and 45.37 crore linked health records by late November 2024, with further expansion reported in December 2024. These developments indicate that the operational environment for platform-led precision health is strengthening at scale.

A key differentiator for HOLNESS lies in its ability to bridge the gap between molecular discovery and real-world care coordination. A large share of genomics-led offerings still remain concentrated at the testing layer, where a result is generated without a structured pathway for preventive action, therapeutic guidance, or ongoing engagement. HOLNESS creates stronger market relevance by framing precision medicine as a continuous care discipline shaped by phenotype, family history, genomic insight, multi-omics interpretation, and individualized care planning. The recent Multi-Omics Summit 2026 messaging from the Government of India further supports this direction by highlighting multi-omics, diagnostics, and translational research as central to the future of personalized healthcare.

The framework also aligns well with India's growing emphasis on ethical, governed, and clinically responsible biomedical innovation. ICMR's National Ethical Guidelines cover research involving human participants, biological material, and data, while also addressing areas such as human genetics, genomics, and biobanking. That governance layer is important for any precision-health proposition that seeks institutional credibility and long-term scalability. In this setting, HOLNESS is well positioned as a disciplined model that combines scientific depth with trust, continuity, and clinical usability. Rather than presenting genomics as a one-time analytical service, it supports a more durable precision-health structure built around earlier risk identification, stronger diagnostic accuracy, better-informed treatment decisions, and sustained patient engagement.

3.2 Integration of Precision Diagnostics, Multi-Omics, and Preventive Health

India's emerging precision medicine ecosystem is increasingly defined by the convergence of precision diagnostics, multi-omics research, and preventive healthcare delivery. The market is moving beyond isolated testing models toward a more integrated framework in which genomic data, molecular profiling, clinical records, and longitudinal risk monitoring work together within a connected care pathway. That transition is supported by the country's expanding scientific infrastructure. GenomeIndia has archived whole genome sequencing data for 10,000 individuals and built a reference base spanning 83 Indian populations, with access governed through the Indian Biological Data Centre (IBDC), the FeED protocol, and BIOTECH-PRIDE data-sharing guidelines. This creates a stronger national foundation for population-relevant genomic analysis and supports the broader shift from fragmented diagnostics toward precision-led healthcare models.

The integration of precision diagnostics within this ecosystem is no longer limited to single-gene testing or isolated molecular reports. India's policy and scientific discourse now places stronger emphasis on using genomics alongside transcriptomics, proteomics, and AI-driven interpretation to support individualized diagnosis and treatment decisions. At the Multi-Omics Summit 2026, the Government of India explicitly stated that the future of medicine will be shaped by multi-omics technologies integrated with artificial intelligence, enabling prescriptions tailored to a patient's genetic profile, lifestyle, and environmental context.

Within this framework, multi-omics strengthens precision medicine by improving the depth and usability of biological interpretation. Genomics provides inherited and population-level insight, while transcriptomics, proteomics, and related omics layers improve disease characterization, pathway mapping, response monitoring, and therapeutic targeting. In the Indian setting, that integrated model is gaining visibility not only in academic and translational research but also in the broader healthcare narrative promoted by public institutions. Government messaging has increasingly linked multi-omics with diagnostics, drug discovery, and personalized healthcare delivery, reinforcing the commercial and clinical relevance of platforms that combine molecular intelligence with practical care workflows.

The preventive health component gives this integration greater strategic value in India. Preventive care in the country is already supported through population-level screening programs under the National Programme for Prevention and Control of Non-Communicable Diseases (NP-NCD). Official government sources state that population-based screening for individuals aged 30 years and above covers hypertension, diabetes, and common cancers including oral, breast, and cervical cancer. By December 2024, the government reported that 770 District NCD Clinics, 372 District Day Care Centres, 233 Cardiac Care Units, and 6,410 Community Health Centre NCD Clinics had been set up under NP-NCD. In February 2025, the Union Health Ministry also launched an intensified special NCD screening drive aimed at 100% coverage of all individuals aged 30 years and above. Together, these developments show that preventive health in India is not a peripheral theme instead it is an institutionalized layer of care delivery with growing scale and policy priority.

The preventive infrastructure is highly relevant for precision health positioning. Public statements from Indian policymakers have already linked preventive healthcare, widespread screening, and genomic or microbiome-based data to the future of precision health and precision nutrition. India's healthcare direction is increasingly favorable for models that connect early risk identification with molecular insight and follow-up intervention. The market opportunity therefore lies not only in offering advanced diagnostics, but in embedding those diagnostics within preventive pathways that identify risk earlier, stratify patient populations better, and guide clinical action before disease burden escalates.

Digital health infrastructure adds the operational layer required for this integration to function at scale. Precision diagnostics and multi-omics generate high-value data, yet their clinical impact depends on record continuity, interoperability, patient identity linkage, and physician access across the care journey. India's Ayushman Bharat Digital Mission has materially strengthened this foundation. As of 6 February 2025, the government reported over 73.98 crore ABHA accounts, more than 49.06 crore linked health records, over 3.63 lakh registered health facilities, and more than 5.64 lakh registered healthcare professionals within the digital health ecosystem. These numbers indicate that India now has a rapidly expanding digital backbone capable of supporting longitudinal data exchange across diagnostic, preventive, and treatment settings. The integration of precision diagnostics, multi-omics, and preventive health marks one of the clearest evolution pathways for India's precision medicine ecosystem. It supports a shift from episodic molecular analysis toward continuous precision care.

3.3 Population-Scale Personalized Care Pathways

Population-scale personalized care pathways are becoming a defining feature of India's precision medicine and genomics ecosystem. The market is no longer limited to isolated genomic tests or specialist-led interventions. It is increasingly moving toward structured pathways that connect large-scale screening, longitudinal digital records, genomic insight, risk stratification, and targeted follow-up across broad patient populations. India's scale, genetic diversity, and expanding health infrastructure create a distinctive foundation for this transition. GenomeIndia has already generated whole genome data for over 10,000 individuals drawn from 83 diverse populations, while also building a biobank and public-access genomic datasets through the Indian Biological Data Centre. Government statements in March 2026 further linked India's vast genetic diversity and expanding genomic databases with predictive healthcare, precision diagnostics, and customized treatment protocols.

A population-scale pathway in the Indian context does not imply a single uniform care model for all patients. It points to a system in which large cohorts are screened and segmented early, then moved into differentiated care journeys based on risk, phenotype, molecular profile, and disease susceptibility. That direction is already visible in public health architecture. The Ayushman Bharat Digital Mission was created to enable interoperability of health data and longitudinal electronic health records, and as of 6 February 2025 it had recorded 73.98 crore ABHA accounts, 49.06 crore linked health records, 3.63 lakh registered health facilities, and 5.64 lakh registered healthcare professionals. The same official update states that ABDM supports continuity of care across primary, secondary, and tertiary healthcare in a seamless manner, including remote and rural settings. That digital backbone is critical for personalized pathways, since population-scale precision care depends on identity-linked records, data portability, and continuity across the care journey.

Preventive screening programs are already creating the front end of these pathways. Under India's NCD program, population-based screening covers adults aged 30 years and above for hypertension, diabetes, and common cancers of the oral cavity, breast, and cervix. In February 2025, the Ministry of Health and Family Welfare launched an intensified special NCD screening drive with the explicit goal of achieving 100% coverage of all individuals aged 30 years and above for these conditions. National Health Mission materials also show that population-based screening was designed to mobilize communities, identify risk earlier, and refer screened individuals into higher levels of diagnosis and management.

This establishes a large-scale entry mechanism through which personalized care pathways can begin with broad screening and move into more targeted diagnostic and therapeutic layers.

Genomics-focused clinical pathways are also taking shape in parallel. The Department of Biotechnology's UMMID initiative was established to address the burden of inherited disorders in the country, and one of its components, NIDAN Kendras, provides prenatal testing, newborn screening for relatively common treatable genetic metabolic disorders, and genetic counselling for high-risk pregnancies. The same February 2026 government update also noted support for the Indian Tuberculosis Genomic Surveillance Consortium, which uses genomics and artificial intelligence to detect drug-resistance mutations and improve TB control strategies. These initiatives of India shows the already building pathway-based models in which genomics is linked to screening, counselling, disease management, and public-health decision making rather than being treated as a stand-alone laboratory exercise.

A second important layer is the emergence of broad population datasets that combine genomic, clinical, and lifestyle information. The February 2026 government update states that Phenome India National Biobank was launched at CSIR- Institute of Genomics and Integrative Biology (IGIB) as the backbone of a nationwide cohort study collecting comprehensive genomic, lifestyle, and clinical data from 10,000 individuals across the country. Combined with GenomeIndia's population-representative genomic reference, such resources strengthen the ability to create Indian-context risk models, identify subgroup-level variation, and design more locally relevant personalized pathways.

Evidence from targeted public-health use cases further reinforces the pathway model. CSIR-CCMB reported development of an affordable rapid molecular test for sickle cell anaemia and stated that over 20 lakh tribal individuals had already been screened under the CSIR Sickle Cell Anaemia Mission through screening, drug development, and genome-based solutions. The initiative also includes field deployment infrastructure for large-scale regional screening. India's precision medicine ecosystem is therefore evolving not only in elite clinical settings but also through large-scale pathway models built around disease burden, risk concentration, and community-level intervention.

3.4 Clinical Decision Support and Therapy Optimization

Clinical decision support and therapy optimization are becoming central to India's precision medicine and genomics ecosystem. Market evolution is moving beyond diagnostic discovery toward a model in which genomic insight, multi-omics interpretation, longitudinal records, and physician-facing intelligence directly inform treatment selection and ongoing care decisions. In March 2026, the Government of India stated that the future of medicine in the country will be shaped by genomics, transcriptomics, proteomics, and artificial intelligence, enabling doctors to design personalized prescriptions based on a patient's genetic profile, lifestyle, and environmental factors.

Clinical decision support gains real significance only when molecular findings are connected to usable clinical workflows. India's digital health infrastructure is increasingly providing that operational layer. The Ayushman Bharat Digital Mission was launched to enable interoperability of health data and longitudinal electronic health records, and by 6 February 2025 had recorded 73.98 crore ABHA accounts, 49.06 crore linked health records, 3.63 lakh registered health facilities, and 5.64 lakh registered healthcare professionals. The Ministry of Health and Family Welfare also states that the ABDM ecosystem supports continuity of care across primary, secondary, and tertiary levels, including remote and rural settings.

Therapy optimization is also gaining institutional depth through disease-specific precision initiatives. The Government of India stated in February 2026 that the Indian Tuberculosis Genomic Surveillance Consortium is cataloguing existing and emerging drug-resistance mutations in *Mycobacterium tuberculosis* and is using genomics and artificial intelligence for faster detection and evidence-based control and management strategies. The same official update states that DHR's DIAMOnDS scheme is delivering advanced molecular diagnostics for lung and breast cancer through 25 centres, boosting precision treatments.

The DIAMOnDS platform is especially relevant to the clinical decision support theme. According to the Department of Health Research, DIAMOnDS was created to establish zonal oncopathology labs that provide free advanced molecular oncopathology diagnostic services for lung and breast cancers, along with digital reporting, guided referral linkages, and regular service evaluation. The DHR page states that 24 DIAMOnDS centres had already been established, including a data management centre at ICMR-NCDIR Bengaluru and a quality assessment centre at ICMR-NIOP Delhi, with further centres approved to improve geographic spread. The same programme architecture links molecular diagnostics with physician awareness, referral coordination, monitoring, and standardization, which are all core elements of therapy optimization in real clinical settings.

India's oncology ecosystem also shows that structured decision-support mechanisms are gaining formal institutional recognition. Tata Memorial Hospital's Annual Report 2021-22 lists dedicated volumes on precision oncology, NGS data analysis and a live molecular tumour board, theranostics, technological advances in radiation oncology, and pathology informatics under its Evidence Based Management of Cancers in India series. That institutional footprint matters since molecular tumour boards and evidence-based oncology frameworks help translate genomic findings into treatment choices, escalation decisions, and response evaluation pathways.

A broader treatment-optimization layer is also emerging through inherited-disorder and advanced-therapy governance initiatives. The February 2026 government update notes that NIDAN Kendras under the UMMID initiative support prenatal testing, newborn screening, and counselling for at-risk pregnancies, while the same update highlights national support for precision biotherapeutics including mRNA therapeutics, monoclonal antibodies, and cell and gene therapies. Alongside this, ICMR's gene therapy product guidelines state that India is entering a phase in which personalized treatment and precision medicine are expanding in both clinical and patient-care settings.

An ICMR-supported 2025 training programme on Precision Medicine: Promise and Practice included genome-based diagnostics, AI and machine learning in precision medicine, pharmacogenomics, genomic data analysis, and related computational tools. Such training signals that clinical decision support in India is no longer being treated as a narrow research topic. It is being built into the country's translational and workforce development agenda, which strengthens the long-term adoption environment for platforms that combine diagnostics, interpretation, and care coordination.

3.5 Unified AI-Enabled Continuum of Care

India's precision medicine and genomics ecosystem is increasingly moving toward a unified AI-enabled continuum of care in which screening, diagnostics, clinical interpretation, treatment guidance, remote consultation, and longitudinal follow-up are connected within one interoperable health environment. This shift reflects a broader national transition from episodic care delivery toward digitally coordinated and intelligence-driven care models. In March 2026, the Government of India stated that the country is entering an era of personalized and precision medicine powered by genomics, artificial intelligence, and advanced biotechnology, with the explicit objective of enabling earlier detection and more targeted treatment.

The digital backbone for this continuum is already being built at scale through Ayushman Bharat Digital Mission. As of 6 February 2025, ABDM had created more than 73.98 crore ABHA accounts, linked over 49.06 crore health records, registered more than 3.63 lakh health facilities and 5.64 lakh healthcare professionals, and enabled over 1.59 lakh health facilities to use ABDM-compliant software. The Ministry of Health and Family Welfare also states that ABDM is designed to create longitudinal electronic health records and support continuity of care across primary, secondary, and tertiary settings, including remote and rural areas. In January 2026, official government documentation further described ABDM as a citizen-centric interoperable digital health ecosystem that enables citizens to securely store and share prescriptions, diagnostic reports, and discharge summaries, thereby creating a longitudinal health history.

Artificial intelligence is increasingly becoming the intelligence layer within this digital foundation. In February 2026, a Government of India paper on AI in healthcare stated that India's AI-enabled healthcare ecosystem is already supporting early detection and screening, enhanced clinical decision support, and remote care. The same document noted that 282 million telemedicine consultations between April 2023 and November 2025 were supported by AI-recommended diagnoses, while AI-enabled tools within national programmes contributed to a 27% decline in adverse TB outcomes and generated over 4,500 outbreak alerts. These developments are strategically important as they show that AI in India is not being positioned only as an experimental technology but as an operational layer that strengthens care quality, speed, and continuity across real public-health delivery systems.

Telemedicine is a major execution channel within this AI-enabled continuum. The Ministry of Health and Family Welfare states that eSanjeevani is India's national telemedicine service and a major instrument for digital health equity and universal health coverage. Government releases also note that telemedicine is expanding access to specialized medical care across the country, particularly in rural and underserved areas. More importantly for precision-health positioning, the Clinical Decision Support System integrated into eSanjeevani streamlines symptom capture and provides AI-based differential diagnosis recommendations. By November 2025, this CDSS integration had supported 282 million consultations through standardized data capture, creating a stronger foundation for more consistent and informed remote clinical decision-making.

The emerging policy and governance framework is also reinforcing the continuity model. In February 2026, the Government of India launched SAHI, the Strategy for Artificial Intelligence in Healthcare for India, and BODH, the Benchmarking Open Data Platform for Health AI, at the India AI Impact Summit. Official releases describe SAHI as a national guidance framework for safe, ethical, evidence-based, responsible, and inclusive adoption of AI across India's healthcare system, while BODH is positioned as a structured mechanism for testing and benchmarking health AI solutions before deployment at scale. In March 2026, the Ministry of Health and Family Welfare also confirmed that the ABDM sandbox provides integration toolkits that allow developers to integrate AI applications, including AI screening tools, into the digital health ecosystem. This combination of interoperability, validation, and governance materially strengthens the case for unified AI-led care pathways in India.

From a market perspective, the unified AI-enabled continuum of care matters because it closes the historical gaps between diagnosis, treatment, monitoring, and follow-through. In traditional fragmented models, diagnostic outputs often remained disconnected from longitudinal records, specialist interpretation, remote support, and preventive follow-up. India's current ecosystem direction is reducing those disconnects. AI-assisted triaging, digital records, interoperable identity, teleconsultation, and data-sharing architecture are beginning to create a more continuous care journey in which a patient can move from screening to diagnosis, treatment planning, remote monitoring, and ongoing management within a linked system. That progression is especially relevant for precision medicine, where value depends not only on identifying biological risk but also on converting that insight into sustained care action. This is an inference drawn from the way ABDM, eSanjeevani, SAHI, BODH, and AI-supported public-health tools are being structured and deployed.

3.6 Alignment with India's Emerging Precision-Health Infrastructure

India's emerging precision-health infrastructure is taking shape through the simultaneous build-out of genomic reference resources, interoperable digital health architecture, advanced molecular diagnostics capacity, and governed AI adoption. National policy messaging in 2026 has explicitly linked genomics, artificial intelligence, advanced biotechnology, predictive healthcare, precision diagnostics, and customized treatment protocols as part of the country's next phase of healthcare transformation. That broader direction gives precision-health platforms a stronger operating context than in a market driven only by stand-alone laboratory growth.

A foundational layer of that infrastructure is the country's genomic and biological data ecosystem. GenomeIndia has completed whole genome sequencing of 10,000 individuals from 83 diverse Indian populations and has also built a larger biological sample base for future research. In parallel, the Indian Biological Data Centre functions as the first national digital repository mandated to archive life science data generated from publicly funded research in India and supports implementation of the Biotech-PRIDE data-exchange framework. Together, these assets strengthen India's ability to generate population-relevant genomic intelligence, store it within national systems, and support future precision-health applications on a more representative scientific base.

A second layer is the digital public health backbone created through Ayushman Bharat Digital Mission. Official government updates state that ABDM was launched to enable interoperability of health data and create longitudinal electronic health records for every citizen. As of 6 February 2025, the programme had created 73.98 crore ABHA accounts, linked 49.06 crore health records, registered 3.63 lakh health facilities and 5.64 lakh healthcare professionals, and reached all 36 States and Union Territories across 786 districts. That level of digital spread matters for precision health as personalized care pathways depend on identity-linked records, continuity across care settings, and data portability across providers and geographies.

Clinical infrastructure is also becoming more aligned with precision-medicine delivery. The Government of India's February 2026 update on personalized medicine states that advanced molecular diagnostics, targeted therapies, genomics initiatives, NIDAN Kendras for genetic disorders, and the Indian Tuberculosis Genomic Surveillance Consortium are all part of the country's precision-health push. On the care-delivery side, the DHR-ICMR DIAMOnDS programme has established 24 centres, including dedicated data management and quality assessment nodes, to provide advanced molecular oncopathology diagnostic services for lung and breast cancers.

That combination indicates that India's infrastructure is not limited to research capacity alone; it is increasingly extending into organized clinical translation.

Governance and trust architecture form another important alignment layer. ICMR's National Ethical Guidelines explicitly address biobanking and consent-related issues for biospecimen storage and later use in research, reinforcing the governance base required for genomics-led healthcare. At the same time, the Ministry of Health and Family Welfare launched SAHI and BODH in February 2026 to support safe, ethical, transparent, and evidence-based deployment of AI in healthcare. A further government update in March 2026 stated that the ABDM sandbox provides integration toolkits that allow developers to integrate applications, including AI screening tools, into the digital health ecosystem. Precision-health infrastructure in India is therefore evolving not only through new scientific assets, but also through stronger governance, validation, and integration mechanisms.

3.7 Ecosystem Impact Potential of MyCare 360

MyCare 360 can be positioned as the digital coordination layer within Harley of London India's broader precision-health ecosystem. HARLEY's public materials associate MyCare 360 with health tracking, wellbeing assessments, personalised pathways, preventive insights, digital care tools, rewards integration, AI insights, and remote monitoring. That combination supports a stronger market-facing narrative in which MyCare 360 functions not simply as a user-facing application, but as the interface through which data, engagement, pathway management, and ongoing support are brought together in one connected environment.

MyCare 360 relevance is particularly strong across elder care, chronic care, and dependent care settings. A platform built around monitoring, assessment, preventive insight, pathway personalization, and digital care tools is well suited to care environments where continuity, caregiver visibility, adherence support, and day-to-day coordination carry high value. MyCare 360 can therefore be framed as a practical care-enablement layer for long-duration and high-touch care journeys rather than a limited wellness utility. This chronic-care and dependent-care positioning is an analytical inference based on the platform capabilities highlighted in HARLEY's own materials.

MyCare 360 also aligns well with ABDM's interoperability direction. The Ministry of Health and Family Welfare states that ABDM is designed to enable interoperability of health data, create longitudinal electronic health records, and support continuity of care across primary, secondary, and tertiary healthcare. As of 6 February 2025, ABDM had created more than 73.98 crore ABHA accounts, linked over 49.06 crore health records, and registered more than 3.63 lakh health facilities and 5.64 lakh healthcare professionals nationwide. That infrastructure creates a strong operating backdrop for digital platforms that gain value from connected records, coordinated workflows, and longitudinal care delivery.

Its strongest ecosystem impact lies in its role as a continuity layer within precision-health pathways. Precision medicine delivers greater value when diagnostic insight is carried forward into preventive guidance, monitoring, personalised pathways, and ongoing care support. MyCare 360 fits that downstream requirement by linking measurable wellbeing, remote monitoring, personalised pathway design, and digital care tools within one ecosystem. In the context of HARLEY's HOLNESS framework and India's expanding ABDM architecture, MyCare 360 is positioned as the layer that helps sustain precision-health journeys beyond diagnosis and into coordinated, longitudinal care execution.

3.8 Strategic Outlook for Harley of London India

The strategic outlook for Harley of London India is strengthening within an Indian healthcare environment that is becoming more digital, more preventive, and more precision-led. India's policy direction now places genomics, artificial intelligence, advanced biotechnology, predictive healthcare, precision diagnostics, and customized treatment protocols within the same future-health narrative. At the system level, that creates a more supportive market setting for integrated care platforms that combine monitoring, personalized engagement, digital records, and coordinated follow-through rather than operating only as stand-alone wellness or diagnostic offerings.

Harley of London India enters this market with a positioning model that already aligns with several of those structural shifts. The Harley Street Healthcare Group site presents the brand as active in India and describes an ecosystem built around proactive health and well-being management. Its product portfolio includes MyCare 360 as a personal healthcare mobile app, Harley Priority Pass as a preventive-health-focused digital membership with custom care plans, and broader digital and marketplace elements across India and other geographies. These assets indicate that Harley of London India is not being framed only as a single-service provider, but as a wider health, wellness, and digital-engagement platform.

A major growth lever in the outlook is the expanding fit between Harley of London India's platform model and India's digital public health backbone. As of 6 February 2025, Ayushman Bharat Digital Mission had created more than 73.98 crore ABHA accounts, linked over 49.06 crore health records, registered more than 3.63 lakh health facilities and 5.64 lakh healthcare professionals, and extended across all States and Union Territories. The Ministry of Health and Family Welfare also states that ABDM is designed to create longitudinal electronic health records and support continuity of care across primary, secondary, and tertiary settings. That infrastructure materially improves the long-term outlook for private platforms that gain relevance from continuity, digital identity linkage, record integration, and ongoing care coordination. Harley of London India's product direction therefore aligns with a health system that is increasingly rewarding connected and longitudinal engagement.

Another important growth vector is the rise of preventive and personalized care as a mainstream healthcare theme in India. The company's own product language places significant emphasis on proactive health management, longevity, custom care plans, and individualized support. That positioning fits a domestic environment where government messaging increasingly links early detection, precision medicine, and technology-enabled care with the future of healthcare delivery.

Harley of London India is entering a market where preventive-health propositions are moving closer to the centre of health-system transformation rather than remaining at the edge of discretionary wellness spending.

The outlook is also strengthened by the company's visible movement into capability building and ecosystem formation inside India. Public reporting in January 2026 stated that Harley of London India announced a Global Centre of Excellence for Health, Wellness and Lifestyle in Chandigarh in collaboration with Porto Business School and Kongju National University. According to that announcement, the centre is intended to support leadership development, workforce capability, applied innovation, life sciences, biosciences, and AI-enabled healthcare and wellness solutions. That broadens the strategic outlook from commercial platform rollout toward longer-term institution building.

HARLEY of LONDON India's strongest strategic opportunity lies in occupying the intersection of preventive care, digital coordination, and precision-health enablement. India's health-system trajectory is building toward broader genomic adoption, AI-supported care delivery, interoperable digital infrastructure, and greater use of personalized health pathways. Harley of London India's portfolio and India-linked ecosystem moves place it in a position to participate in that convergence through consumer-facing care management, membership-led preventive engagement, platform-based monitoring, and institution-linked capability development.

3.9 Strategic Implications

HARLEY of LONDON is uniquely positioned in India as its model combines a core precision-health framework, a digital continuity layer, and a broader ecosystem approach rather than relying on a single-point offering. HOLNESS is framed by the company as a living ecosystem that adapts to the individual, while MyCare 360 is defined as personal health infrastructure with health tracking, wellbeing assessments, personalised pathways, preventive insights, digital care tools, and rewards integration. Taken together, these elements give Harley of London India a differentiated position at the intersection of preventive care, personalized engagement, digital coordination, and longitudinal wellbeing management. The positioning is strategically stronger than a stand-alone diagnostics, wellness, or app-based model as it connects insight, engagement, and execution within one integrated architecture.

This ecosystem also aligns well with India's 2030-oriented health direction. The National Health Policy 2017 sets a preventive and promotive healthcare orientation as a core goal, links national health priorities with the sustainable development goals, and explicitly recognizes the role of a digital health technology ecosystem in strengthening care delivery. ABDM extends that direction by building a pan-India digital health backbone designed for interoperable records, continuity of care, and citizen-linked health data exchange. Harley of London India fits this national trajectory as its ecosystem is built around prevention, continuity, personalization, and digitally enabled care journeys, which are all increasingly central to India's long-term health-system transformation.

Harley of London India's product architecture also aligns credibly with India's national digital and genomic infrastructure. ABDM is creating the interoperability layer needed for connected patient journeys, while GenomeIndia is building a population-relevant genomic base through whole genome sequencing, biobanking, and Indian Biological Data Centre archiving, with an explicit pathway toward affordable genomics-based diagnostics and precision medicine tailored to the Indian population. Against that backdrop, HOLNESS and MyCare 360 can be positioned as downstream enablement layers that translate data, preventive insight, pathway design, and ongoing engagement into real-world care coordination.

3.10 Market Opportunity for HARLEY of LONDON

3.10.1 Preventive-care Monetization

Preventive-care monetization is one of the strongest opportunity pools for HARLEY of LONDON in India as prevention is moving from a discretionary wellness theme to a policy-backed healthcare priority. India's National Health Policy 2017 explicitly places preventive and promotive healthcare at the center of the health system, and the Union Health Ministry's intensified NCD screening drive launched in February 2025 targeted 100% screening of all individuals aged 30 years and above for diabetes, hypertension, and three common cancers through the NP-NCD network. This creates a favorable demand environment for structured preventive offerings built around recurring engagement rather than one-time interventions.

Within that environment, HARLEY of LONDON's ecosystem is well suited to monetize prevention through memberships, assessments, personalised pathways, digital care tools, and rewards-linked engagement. The HOLNESS brochure links MyCare 360 to health tracking, wellbeing assessments, personalised pathways, preventive insights, digital care tools, and rewards integration, while the broader HOLNESS structure is designed around long-term improvements in health, wellness, and lifestyle. This supports a commercial model based on subscription-led preventive engagement, family and dependent-care packages, pathway upgrades, partner-service referrals, and recurring digital follow-through.

3.10.2 Digital-health Revenue Pathways

Digital-health revenue pathways represent a second major opportunity area. At the infrastructure level, ABDM had already scaled to more than 73.98 crore ABHA accounts, over 49.06 crore linked health records, more than 3.63 lakh registered health facilities, and more than 5.64 lakh healthcare professionals by 6 February 2025. This combination of market growth and digital public infrastructure materially strengthens the revenue outlook for platforms that can operate across records, monitoring, pathway management, and user engagement.

For HARLEY of LONDON, these pathways extend beyond app subscriptions. MyCare 360 already sits closer to a digital operating layer through its combination of tracking, assessments, pathways, preventive insights, and digital care tools. That makes the platform relevant for premium consumer subscriptions, chronic-care and elder-care coordination plans, employer and institutional wellness programs, remote monitoring-led packages, pathway-based premium upgrades, and rewards- or marketplace-linked monetization.

The policy environment is also becoming more supportive for this type of model: in February and March 2026, the Government of India launched SAHI and BODH to support safe and evidence-based health AI deployment, while also confirming that the ABDM sandbox enables integration of AI tools into the digital health ecosystem. That gives HARLEY of LONDON a stronger long-term platform opportunity in AI-enabled, interoperable digital care delivery.

3.10.3 Longevity and Wellness Integration

Longevity and wellness integration adds a broader and highly strategic demand layer to HARLEY of LONDON's India opportunity. Invest India states that India ranked seventh in the global wellness economy with a market size of USD 132.5 billion in 2022, while UNFPA notes that India's elderly population is projected to reach 193 million by 2030 and 347 million by 2050. This means the market is being shaped by two reinforcing trends at the same time: rising consumer spending on wellness and a rapidly expanding ageing population that will require stronger support for healthy ageing, monitoring, resilience, and long-duration care engagement.

HARLEY of LONDON is well placed to participate in that intersection as its ecosystem is not limited to illness response or narrow wellness positioning. HOLNESS is framed around compounding improvements across health, wellness, and lifestyle, while MyCare 360 provides the measurable and personalised infrastructure that can support long-term engagement. This creates a commercially attractive bridge between premium wellness consumption and longevity-oriented care coordination, especially across elder care, dependent care, preventive memberships, and lifestyle optimization pathways. Longevity and wellness integration gives HARLEY of LONDON access to a broader value pool where emotional wellbeing, preventive health, digital monitoring, and personalized daily support increasingly sit within the same consumer and care journey.

3.11 Competitive Advantage

HARLEY of LONDON's competitive advantage in India begins with its cross-border footprint and international operating narrative. The UK parent brand, Harley Street Healthcare Group, presents itself as a global healthcare company headquartered in London and states that it is expanding its product networks internationally. Its product library further indicates cross-market availability for key offerings, including Harley Priority Pass across the UK, Canada, India, the Balkans, Italy, and other countries; Harley eMarket Place across the UK, Canada, India, and Italy; and MyCare across the UK, Italy, Austria, and Switzerland. This gives HARLEY of LONDON INDIA a stronger strategic starting point than a purely domestic wellness entrant, since the company can position India not as an isolated launch market but as part of a wider international platform architecture.

A second advantage is HARLEY of LONDON's integrated ecosystem design. HOL INDIA PVT LTD describes its India platform as the world's first Everything Human Ecosystem, integrating health, wellness, lifestyle, sanctuary, emotional intelligence, and AI companionship into one coherent system. The HOLNESS brochure adds another layer by presenting HOLNESS as a living ecosystem with tiered memberships, community access, guided sessions, partner benefits, and compounding gains across health, wellness, and lifestyle. MyCare 360 is embedded into that system as personal health infrastructure providing tracking, assessments, personalised pathways, preventive insights, digital care tools, and rewards integration. This architecture creates a competitive edge as it reduces fragmentation across digital engagement, preventive care, behaviour support, and service access. HARLEY is not competing only as an app, only as a membership, or only as a wellness brand. It is competing as an interconnected platform.

A third advantage comes from institutional partnerships and ecosystem linkages. The January 2026 Chandigarh announcement states that HARLEY of London India's Global Centre of Excellence for Health, Wellness and Lifestyle is being developed with Porto Business School and Kongju National University. According to that announcement, Porto Business School supports curriculum design, leadership development, and international benchmarking, while Kongju National University contributes to the Innovation Hub and applied research translation in life sciences, biosciences, and AI-enabled healthcare and wellness innovation.

Another advantage lies in capability-building investment, which is especially relevant in a market where preventive health, wellness operations, and digital-health delivery still face talent and execution gaps. The Chandigarh Global Centre of Excellence is designed, according to the announcement, to support postgraduate and executive programmes, short-form certifications, lifelong learning, and an Innovation Hub focused on life sciences, biosciences, and responsible AI-enabled healthcare and wellness solutions. Strategically, this matters as it pushes HARLEY of London India beyond commercial rollout and into workforce development, skilling, and applied innovation. Few ecosystem players attempt to build both customer-facing health platforms and institutional capability engines at the same time. That combination can strengthen product execution, partner trust, and long-term market credibility.

Viewed together, HARLEY of LONDON's competitive advantage in India rests on five reinforcing pillars: an international operating footprint, premium brand signaling, an integrated ecosystem model, institutional partnerships, and visible capability-building investment. This combination gives the company a differentiated strategic position within India's evolving preventive-health, digital-health, and precision-health landscape, particularly in categories where continuity, personalization, and platform coordination are becoming more valuable than stand-alone services.

4 Company Profiles

4.1 HOL India Pvt Ltd (HARLEY of LONDON)

1st floor, Jai Prakash Market,

BMP Road, Ashiana more,

Patna-800014, Bihar,

India

4.1.1 Company Basic Information and Its Competitors

TABLE 4 HOL INDIA PVT LTD (HARLEY OF LONDON) BASIC INFORMATION AND ITS COMPETITORS

| # | Item | Description |
|---|--------------|--------------------------------------|
| 1 | Company Name | HOL India Pvt Ltd (HARLEY of LONDON) |
| 2 | Website | www.harleyoflondon.in |

Source: HOL India Pvt Ltd (HARLEY of LONDON), Company Publications, Primary Interviews, and DMR Research Analysis

4.1.2 HOL India Pvt Ltd (HARLEY of LONDON) Product Category

4.1.2.1 MyCare 360

MyCare 360 is a unified digital health system that connects continuous health, wellness, longevity, and patient data management within a single framework. In a precision medicine ecosystem, the model aligns with personalized care by combining physical, emotional, behavioural, and environmental health signals into an ongoing individual health trajectory. The structure includes AI-guided support, longitudinal data capture, and personalized recommendations that can strengthen early risk identification and tailored intervention pathways. A patient data management layer enables consent-based record integration across care, wellness, and insurance functions, creating a longitudinal profile relevant to precision-led decision support. Remote monitoring, telehealth, mobile tools, and interoperability functions position the system as a digital coordination layer for preventive care, chronic condition management, and continuity of care.

Emphasis on behavioural patterns, lifestyle inputs, and adaptive guidance reflects a broader shift toward individualized health management that complements biomarker, diagnostic, and genomic insight generation. MyCare 360 can be understood as a connected health architecture that fits the wider precision medicine ecosystem through integration, personalization, and longitudinal health intelligence.

4.1.2.2 HOLNESS

HOLNESS by HOL India Pvt Ltd (HARLEY of LONDON) is positioned as a disciplined precision-health model that brings personalized pathways, health tracking, wellbeing assessments, preventive insights, digital care tools, and structured support into one integrated ecosystem. The framework creates a bridge between molecular insight and real-world care by linking measurable health intelligence with continuous guidance, lifestyle support, and long-term engagement through MyCare 360. Its architecture supports a continuous-care model rather than a one-time intervention model, which strengthens its relevance in a healthcare environment increasingly focused on longitudinal and connected care. This positioning aligns well with India's current precision-health direction, where genomics, multi-omics, transcriptomics, proteomics, and artificial intelligence are being integrated to enable personalised diagnosis, preventive healthcare, and customised treatment pathways. HOLNESS gives HOL India a stronger role within India's evolving precision-health ecosystem by connecting scientific insight, preventive care, digital coordination, and ongoing patient engagement into one coherent framework.

4.1.3 Unified Global Identity, India Strategy, Ecosystem Architecture, and Precision-Health Enablement

HARLEY of LONDON, operating in India under HOL India Pvt Ltd (HARLEY of LONDON), presents itself as a unified global brand rooted in Harley Street medical excellence and extended through wellness membership programmes, sustainable healthcare practices, and a broader healthcare portfolio. On the India platform, HARLEY of London India is described as the flagship corporate brand and is positioned not as a single-service provider, but as a wider system for human flourishing. The same platform defines its overarching proposition as the world's first Everything Human Ecosystem, integrating health, wellness, lifestyle, sanctuary, emotional intelligence, and AI companionship into one coherent architecture. This framing gives the HARLEY of LONDON a global identity built around integration, continuity, and long-term human wellbeing rather than around a narrow clinical or wellness offering alone.

The India strategy is articulated through a market-building lens rather than a simple market-entry lens. The HOL India positions the country as the epicenter of a global wellness renaissance and highlights four company-defined drivers behind that strategy: demographic scale, India's wellness heritage, government support, and economic potential.

The Harley of London describes India as a priority growth environment for preventive wellness, with a large young population, rising middle-class spending, strong cultural legitimacy through Ayurveda and yoga.

The ecosystem architecture is structured with HARLEY of LONDON as the overarching brand identity, HOLNESS as the foundational wellbeing and precision-health framework, MyCare 360 as the digital enablement and continuity layer, and Harley Priority Pass as the integrated membership platform connecting access across the ecosystem. At the top level, HARLEY of LONDON serves as the umbrella identity and strategic architecture. Within that structure, the thesis section on HOL India states that HARLEY integrates biology, behaviour, environment, emotion, meaning, and AI into one coherent architecture, while HARLEY OF LONDON INDIA is described as the vehicle through which every dimension of human life is brought together into one system. This gives the brand a clear strategic core built around integration rather than fragmentation.

HOLNESS functions as the core framework for structured personalisation and long-duration wellbeing engagement. The HOL India describes it as a living ecosystem designed to improve the human condition and help individuals feel seen, grounded, connected, and whole. It also states that HOLNESS adapts to each person's traits, needs, personality, and aspirations rather than forcing them into a fixed mould. The membership structure, community access, guided sessions, partner benefits, and structured wellbeing pathways all reinforce HOLNESS as the organizing layer through which the broader HARLEY ecosystem is translated into an individual-facing experience.

MyCare 360 then acts as the digital coordination layer within that system. The Digital Layer section of HOL India defines MyCare360 as a unified health and wellness operating system providing AI insights, remote monitoring, and personalised pathways. The HOLNESS adds a more functional layer by linking MyCare 360 with health tracking, wellbeing assessments, personalised pathways, preventive insights, digital care tools, and rewards integration, and by stating that it makes wellbeing measurable, evidence based, and personalised. This gives MyCare 360 a central role in translating ecosystem participation into continuous monitoring, guided action, and longitudinal digital engagement.

Harley Priority Pass operates as the access and monetization layer of the ecosystem. The Digital Layer section of HOL India describes it as Health, Wellness & Lifestyle as a Service and defines it as a single membership integrating every vertical.

The homepage reinforces the same model by presenting access to the complete Everything Human Ecosystem through a single membership spanning all physical verticals plus the digital layer. This membership architecture is strategically important as it connects brand identity, ecosystem design, digital coordination, and recurring participation into one commercial structure rather than leaving them as disconnected product elements.

4.1.4 HOL India Pvt Ltd (HARLEY of LONDON) Recent Developments

TABLE 5 RECENT DEVELOPMENTS

| Date | Type | Description |
|-------------------|-------------|--|
| January 30, 2026 | Expansion | HARLEY of LONDON India announced the launch of a Global Centre of Excellence for Health, Wellness & Lifestyle in Chandigarh, developed in partnership with Porto Business School (Portugal) and Kongju National University (Korea). The Centre was created to address India's shortage of skilled wellness professionals and healthcare management talent through postgraduate programs, executive education, and an Innovation Hub focused on life sciences and AI-enabled solutions. |
| December 2, 2025 | Acquisition | HOL India Pvt Ltd (HARLEY of LONDON) announced the acquisition of an 80% majority stake in Shree Bhagwan Mahaveer Multispeciality Hospital Private Ltd in Aurangabad, Maharashtra, on December 1, 2025. The facility was immediately rebranded as THE LONDON HOSPITAL by HARLEY of LONDON, with a ₹40 crore investment committed to implementing UK-standard clinical protocols, establishing new Centers of Excellence, and expanding wellness-driven services. |
| February 15, 2023 | Expansion | Harley Street Clinics of London announced it was developing community-embedded primary healthcare infrastructure across rural India in partnership with local entrepreneurs, government health bodies, and NGOs. The initiative introduced tech-enabled mobile |

polyclinics offering diagnostic services, women's health, and mental health support, with a target of operating 10 centres by June 2023 and over 100 centres within three years.

Source: Company publications & DMR Research Analysis

4.1.5 Main Business/Business Overview

HOL India Pvt Ltd (HARLEY of LONDON) is a global healthcare and wellness organization dedicated to creating a community-centered approach to health and wellbeing. With headquarters in London and operations across multiple countries including Canada, India, Italy, and the Balkans, the company aims to empower individuals through a seamless, holistic healthcare experience. HARLEY of LONDON offers an integrated healthcare delivery model that combines clinical expertise, advanced technology, and evidence-based wellness practices to provide personalized, proactive, and preventative care. Its portfolio includes all-inclusive medical wellness services, personalized executive wellness programs, and community-focused healthcare initiatives that address physical, mental, social, and financial wellbeing. The organization emphasizes collaboration between clinicians, product managers, and customers to design wellness solutions tailored to individual needs. By blending modern medicine, innovative technological solutions, and insights from traditional healing systems, HARLEY of LONDON delivers comprehensive, preventative, and people-centric health services. The company's mission is to redefine healthcare access and enhance long-term wellbeing, ensuring that individuals receive high-quality care and support across every stage of their wellness journey.

4.2 MedGenome Labs Ltd.

*Ground Floor, Sy No 94/1C and 94/2, E City Tower 1,
2nd Cross Road, Electronic City Phase I. Bangalore, Karnataka, 560100
India*

4.2.1 Company Basic Information and Its Competitors

TABLE 6 MEDGENOME LABS LTD. BASIC INFORMATION AND ITS COMPETITORS

| # | Item | Description |
|---|---------------------|---|
| 1 | Company Name | MedGenome Labs Ltd. |
| 2 | Website | www.diagnostics.medgenome.com |
| 3 | Competitors | HOL India Pvt Ltd (HARLEY of LONDON), Strand Life Sciences Private Limited, MapmyGenome India Ltd., 4baseCare Onco Solutions Pvt. Ltd., Canary Oncoceutics, Inc., Redcliffe Lifetech Pvt. Ltd., HaystackAnalytics Private Limited, Neuberg Diagnostics Pvt. Ltd., Dr. Lal PathLabs Ltd., Metropolis Healthcare Ltd. |

Source: MedGenome Labs Ltd., Company Publications, Primary Interviews, and DMR Research Analysis

4.2.2 MedGenome Labs Ltd. Product Category

4.2.2.1 Reproductive Health Testing Solutions

MedGenome Labs Ltd.'s Reproductive Health Tests and Services provide a comprehensive range of precision diagnostics aimed at supporting clinicians and improving patient care through advanced genetic analyses and diagnostic solutions. These services enable early detection, informed decision-making, and personalized treatment strategies, with a strong focus on accuracy and clinical relevance to deliver actionable insights. The portfolio includes Non-Invasive Prenatal Testing (NIPT), Carrier Screening, Preimplantation Genetic Testing, Maternal Serum Screening, KaryoSeq (Low Pass Whole Genome Sequencing), Chromosomal Microarray Analysis (CMA), Maternal Cell Contamination Testing, Prenatal Exome Sequencing, Targeted Variant Testing, and Rhesus D Track (Non-Invasive Fetal RhD Genotyping), all designed to enhance reproductive care and improve outcomes for families.

4.2.2.2 Rare Inherited Disorders Testing Solutions

MedGenome Labs Ltd.'s Rare Inherited Disorders Testing Solutions provide advanced diagnostic approaches to identify and understand complex inherited diseases at a molecular level, enabling precise diagnosis and recognition of disease subtypes to guide treatment decisions and improve patient outcomes. With a focus on the unique genetic makeup of the Indian population, these solutions enhance clarity in rare disorder diagnosis and support more informed clinical care. The portfolio includes ExomeMAX (Whole Exome Sequencing), Whole Exome Sequencing, Trio Exome Sequencing, Rapid Exome Sequencing, Clinical Exome Sequencing, KaryoTrack Chromosomal Microarray (CMA), BabySecure Newborn Screening, Neuro Genetic Test, Nephro Genetic Test, Endocrine Genetic Test, Ophthalmic Genetic Test, and Cardio Genetics, all designed to deliver comprehensive genetic insights for rare inherited conditions.

4.2.2.3 Oncology Testing Solutions

MedGenome Labs Ltd.'s Oncology Testing Solutions provide a comprehensive range of advanced diagnostics to support the management of blood cancers (haematological malignancies) and solid tumours, helping clinicians make informed decisions across the cancer care journey. These solutions enable understanding of cancer type and stage, selection of suitable treatment, and monitoring of disease response, delivering clear and reliable insights through the integration of genetic and molecular testing with clinical expertise. The portfolio includes OncoTrack Liquid Biopsy Test, Hereditary Cancer Panel, Comprehensive Myeloid & Lymphoid Panel, HRD Track (Homologous Recombination Deficiency Test), CNS Tumor Methylation Classifier, Lung Cancer Panel, HRR Track (Homologous Recombination Repair Test), Multiple Myeloma Test, ThyroTrack (Thyroid Nodule Prognostication Test by NGS), Endometrial Cancer Panel, Gastrointestinal Stromal Tumours Test, BCR-ABL1, and TumorTrack Advance (Comprehensive Tumor Profiling – Tissue Biopsy), all designed to improve cancer diagnosis, treatment, and monitoring for better patient outcomes.

4.2.2.4 Infectious Diseases Testing Solutions

MedGenome Labs Ltd.'s Infectious Diseases Testing Solutions offer advanced diagnostics to support the diagnosis and management of a wide range of infections through genetic and molecular testing approaches. These solutions help clinicians accurately identify causative pathogens and detect drug resistance, enabling timely and effective treatment decisions while improving patient care and supporting public health efforts with a strong focus on precision and clinical relevance.

The portfolio includes MetaSeq Powered by DISQVER (culture-free, cell-free DNA metagenomic test), SPIT SEQ – Whole Genome Sequencing for TB, Sepsis AMR Panel, Comprehensive Transplant Infection Panel, Febrile Neutropenia Panel, Meningoencephalitis Panel, CMV Drug Resistance Test, Prosthetic Joint Panel, TORCH Panel, Respiratory Pathogen Panel, Tropical Fever Panel, Gastrointestinal Pathogen Panel, and HIV Genotyping and Drug Resistance Testing, all designed to deliver accurate and rapid infectious disease diagnostics.

4.2.2.5 Research Services

MedGenome Labs Ltd.'s Research Services offer comprehensive multiomics solutions that integrate genomics, epigenomics, transcriptomics, proteomics, and metabolomics to generate a detailed portrait of cellular and tissue biology. These services enable researchers and clinicians to uncover interactions across molecular dimensions that single-modality analyses might miss, thereby accelerating discoveries and supporting precision medicine initiatives. MedGenome provides end-to-end support including guidance on sample preparation, selection of sequencing platforms, in-depth data analysis, and interactive report interpretation. Services include Whole Genome Sequencing, Metagenomic Sequencing, Exome Sequencing, Blended Genome-Exome Sequencing, Whole Genome Enzymatic Methylation Sequencing, EPIC Array, Targeted Methylome Panels, ATAC and ChIP Sequencing, Eukaryotic and Microbial Transcriptomics, Single Cell Transcriptomics, Single Cell Multiomics, Mass Spectrometry-Based and Olink Proteomics, and Untargeted Metabolomics and Lipidomics, all designed to provide high-quality, actionable data for research and precision medicine applications.

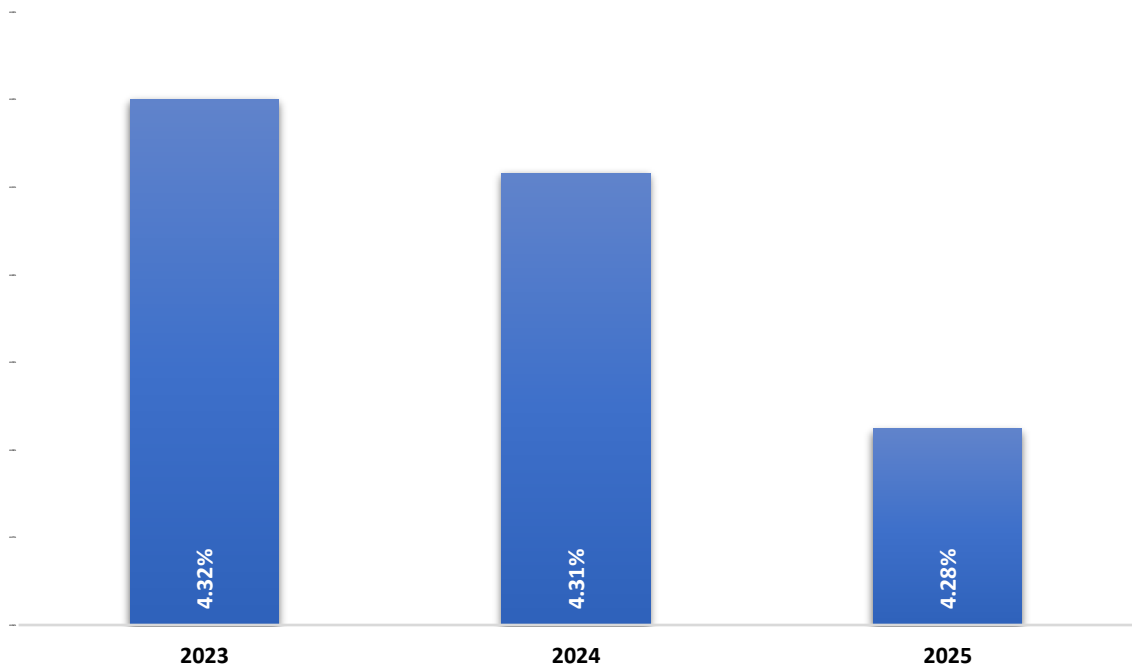
4.2.3 MedGenome Labs Ltd. Precision Medicine and Genomics Ecosystem Revenue (2023-2025)

TABLE 7 MEDGENOME LABS LTD. PRECISION MEDICINE AND GENOMICS ECOSYSTEM REVENUE (USD MILLION) AND MARKET SHARE (2023-2025)

| MedGenome Labs Ltd. | 2023 | 2024 | 2025 |
|---------------------|-------|-------|-------|
| Revenue | 95.6 | 107.7 | 121.8 |
| Market Share | 4.32% | 4.31% | 4.28% |

Source: Secondary Sources, Company Publications, Primary Interviews, and DMR Research Analysis

FIGURE 30 MEDGENOME LABS LTD. PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET SHARE (2023-2025)



Source: Secondary Sources, Company Publications, Primary Interviews, and DMR Research Analysis

4.2.4 MedGenome Labs Ltd. Recent Developments

TABLE 8 RECENT DEVELOPMENTS

| Date | Type | Description |
|---------------|---------|---|
| July 21, 2025 | Funding | Genomics diagnostics firm MedGenome raised \$47.5 million in a Series E round co-led by Maj Invest and Novo Holdings, with Sofina also participating. The funds will expand genomic and integrated diagnostics offerings across India and other emerging markets. |

Source: Company publications & DMR Research Analysis

4.2.5 Main Business/Business Overview

MedGenome Labs Ltd. is a genomics-driven company that provides a broad range of molecular diagnostics, research services, and bioinformatics solutions aimed at advancing precision medicine and translational research. The company offers comprehensive genetic testing across areas such as oncology, rare and inherited disorders, reproductive health, and pharmacogenomics, using next-generation sequencing, targeted gene panels, whole-exome approaches, and complementary molecular techniques. In addition to clinical diagnostics, MedGenome supports pharmaceutical and biotech clients with biomarker discovery, clinical trial sequencing, and companion diagnostic development, combining laboratory workflows with computational analysis and expert variant interpretation. Its services include clinical report generation and genetic counseling to help clinicians and patients understand test results, as well as customized research assays and data analytics for academic and commercial research programs. The organization emphasizes integration of laboratory best practices, quality management, and scalable bioinformatics pipelines to deliver clinically actionable insights while fostering collaborations with healthcare providers, research institutions, and industry partners to translate genomic discoveries into improved patient care.

4.3 Strand Life Sciences Private Limited

*7th Floor, MSR North Tower 144, Dr Puneeth Rajkumar Road,
Outer Ring Rd, Venkateshapura, Nagawara,
Bengaluru, Karnataka 560045
India*

4.3.1 Company Basic Information and Its Competitors

TABLE 9 STRAND LIFE SCIENCES PRIVATE LIMITED BASIC INFORMATION AND ITS COMPETITORS

| # | Item | Description |
|---|---------------------|--|
| 1 | Company Name | Strand Life Sciences Private Limited |
| 2 | Website | www.strandls.com |
| 3 | Competitors | HOL India Pvt Ltd (HARLEY of LONDON), MedGenome Labs Ltd., MapmyGenome India Ltd., 4baseCare Onco Solutions Pvt. Ltd., Canary Oncoceutics, Inc., Redcliffe Lifetech Pvt. Ltd., HaystackAnalytics Private Limited, Neuberg Diagnostics Pvt. Ltd., Dr. Lal PathLabs Ltd., Metropolis Healthcare Ltd. |

Source: Strand Life Sciences Private Limited, Company Publications, Primary Interviews, and DMR Research Analysis

4.3.2 Strand Life Sciences Private Limited Product Category

4.3.2.1 Oncology Solutions

Strand Life Sciences' Oncology solutions offer precision-driven insights that transform cancer detection and management, helping clinicians make confident, informed decisions. Their advanced panels enable early cancer detection, assessment of inherited cancer risk, identification of therapeutic targets in advanced cancers, and non-invasive tumor profiling when tissue biopsies are unavailable. Each test leverages genomic expertise and India-specific population insights to deliver clinically actionable results, with reports carefully reviewed and aligned with current treatment guidelines.

Strand's portfolio includes Germline 3 Gene Panel, HBOC Basic Panel, HBOC Comprehensive Panel, Germline BRCA1 & BRCA2 Test, Lynch Syndrome Panel, Germline Panel – Colorectal Cancer, Germline Panel – Endocrine Cancer, Germline Panel – Renal Cancer, Germline Panel – Prostate Cancer, Germline Panel – Nervous System Cancer, Germline Panel – Skin Cancer, Germline Panel – Pancreatic Cancer, Germline Panel – Gynaecological Cancer, Hereditary Cancer Test, Hereditary Cancer Test – RAPID, Germline Homologous Recombination Repair Test (HRR), Somatic BRCA Test, Somatic Homologous Recombination Repair Test (sHRR), Homologous Recombination Deficiency Test (HRD), Homologous Recombination Deficiency Test (HRD) – RAPID, and many more.

4.3.2.2 Rare Disease and Reproductive Health Solution

Strand Life Sciences' Rare Disease & Reproductive Health solutions empower families and clinicians with clarity at every stage of life, from preconception planning to prenatal care, pediatric diagnosis, and adult genomic insights. Their tests help identify carrier status, assess infertility risks, detect chromosomal abnormalities, and uncover rare genetic conditions even when conventional tests are inconclusive enabling timely and informed clinical decisions. Each test is supported by expert interpretation, providing actionable insights for complex conditions and guiding reproductive and clinical care with confidence. Strand's portfolio includes Couple Carrier Screening, Infertility Screening, MLPA DMD, PGT-A, MaatriSeq (NIPS), MaatriSeq NIPS Advance, Clinical Exome Sequencing, CNSeq/CNSeq HD (Low-pass WGS), ExomePlus, Whole Exome Sequencing, Whole Genome Sequencing, CAH MLPA, and many more.

4.3.2.3 Genomic Wellness

Strand Life Sciences' Genomic Wellness solutions empower individuals to understand their genetic blueprint and make informed lifestyle, nutrition, fitness, and health decisions. Leveraging high-throughput sequencing, proprietary analysis platforms, and expert genetic counseling, Strand provides a comprehensive and confidential assessment of genetic predispositions to health conditions, cancer risks, and nutritional needs. Their offerings are designed to guide preventive health strategies, early detection, and personalized wellness planning, ensuring that each individual can act on scientifically informed insights with confidence. Strand's portfolio includes Strand Genomic Health Insights Test, Strand Breast Assure, Strand NutriDNA, and Strand CancerSpot.

4.3.2.4 Multiomics Services

Strand Life Sciences Private Limited offers Multiomics Services as a comprehensive research partner in genomics, helping decode complex multi-omics questions through integrated views of gene expression, protein dynamics, and epigenetic changes. With automated high-throughput workflows, clinically validated reporting, and AI-powered analytics, they deliver fast and accurate research-grade insights. Their expertise spans genomics, transcriptomics, proteomics, and epigenomics, supported by curated datasets and custom study designs tailored to research goals. The service portfolio includes DNA Sequencing (Whole Genome Sequencing, Whole Exome Sequencing, Amplicon Sequencing, CHIP Sequencing), RNA Sequencing (Total RNA-Sequencing, mRNA Sequencing, Small RNA Sequencing, Spatial Transcriptomics), Microbial Sequencing (Shotgun Metagenomics, 16S rRNA), Microarray Sequencing (Infinium Genotyping, GWAS, Methylation Assays, Agrigenomics Arrays), Epigenomics (Methylation Sequencing, Targeted Methylation, Methylation Array), and Integrated Multiomics approaches combining RNA-seq with DNA Methylation, CHIP-seq, Whole Genome/Exome Sequencing, or ATAC-seq.

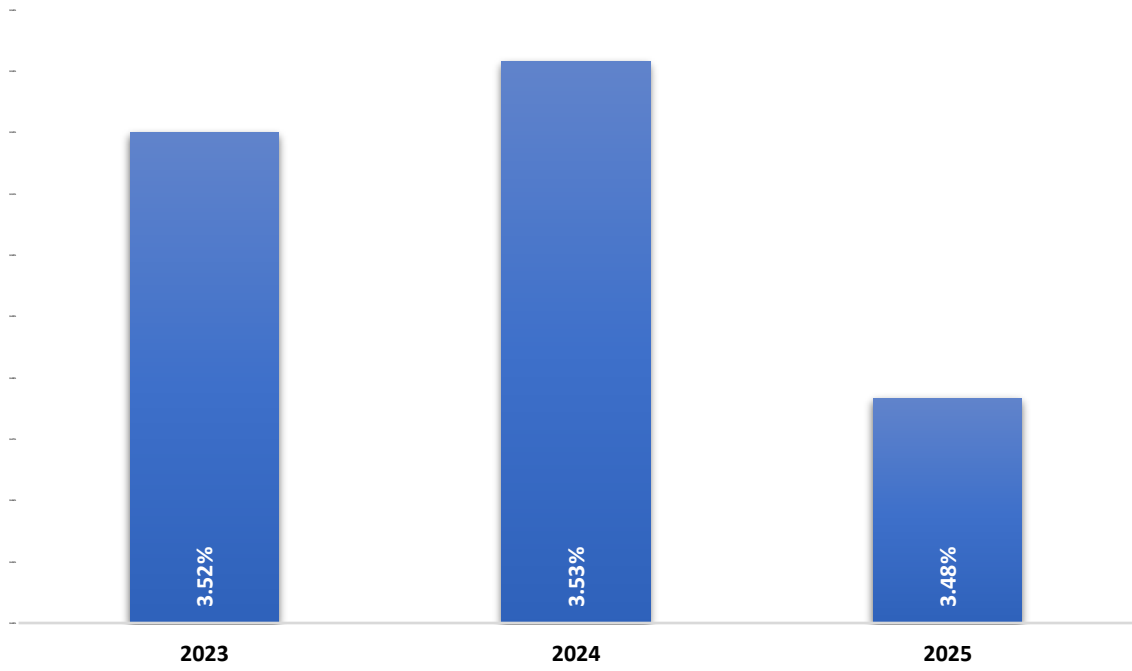
4.3.3 Strand Life Sciences Private Limited Precision Medicine and Genomics Ecosystem Revenue (2023-2025)

TABLE 10 STRAND LIFE SCIENCES PRIVATE LIMITED PRECISION MEDICINE AND GENOMICS ECOSYSTEM REVENUE (USD MILLION) AND MARKET SHARE (2023-2025)

| Strand Life Sciences Private Limited | 2023 | 2024 | 2025 |
|--------------------------------------|-------|-------|-------|
| Revenue | 77.9 | 88.2 | 98.9 |
| Market Share | 3.52% | 3.53% | 3.48% |

Source: Secondary Sources, Company Publications, Primary Interviews, and DMR Research Analysis

FIGURE 31 STRAND LIFE SCIENCES PRIVATE LIMITED PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET SHARE (2023-2025)



Source: Secondary Sources, Company Publications, Primary Interviews, and DMR Research Analysis

4.3.4 Strand Life Sciences Private Limited Recent Developments

TABLE 11 RECENT DEVELOPMENTS

| Date | Type | Description |
|-------------------------|---------------|--|
| October 14, 2025 | Partnership | Strand has been named an AWS Select Tier Partner, highlighting its expertise in managing large genomic datasets. Leveraging secure, scalable platforms, AI-driven analysis, and reliable workflows for research and clinical applications, the recognition reinforces Strand's commitment to practical innovation and delivering impactful genomics solutions in collaboration with AWS. |
| November 5, 2024 | Partnership | Celemics and Strand Life Sciences strengthened their partnership to enhance NGS analysis through an integrated platform. Combining Celeomics' target enrichment kits with StrandOmics, the collaboration ensures clinical-grade data compliance, fast turnaround, and confident variant interpretation for cancer and rare disease cases. |
| April 23, 2024 | Collaboration | Palisade Bio has partnered with Strand Life Sciences in an exciting step toward advancing precision medicine for ulcerative colitis (UC). This collaboration brings together Palisade's rich clinical data from UC studies and Strand's deep expertise in bioinformatics and biomarker discovery. |
| April 4, 2024 | Partnership | SOPHiA GENETICS, a cloud-native software company in the healthcare space and a leader in data-driven medicine, announced a strategic partnership with Strand Life Sciences. The new collaboration will leverage the industry-leading strengths from both companies to provide access to advanced genomics technologies, cutting-edge bioinformatics services and innovative diagnostics solutions. |

Source: Company publications & DMR Research Analysis

4.3.5 Main Business/Business Overview

Strand Life Sciences Private Limited is a precision medicine company that combines advanced genomics, bioinformatics and machine learning to translate complex molecular data into actionable clinical insights. Focusing primarily on oncology and other disease areas where genomic information can guide diagnosis and treatment, the company develops and deploys next generation sequencing based assays, comprehensive data analysis pipelines and clinical interpretation platforms that integrate variant annotation, evidence curation and therapeutic decision support. Its services and solutions are used by hospitals, diagnostic laboratories, research institutions and pharmaceutical partners to support molecular diagnostics, clinical trial enrollment, biomarker discovery and drug development efforts. With a multidisciplinary team of computational biologists, molecular scientists, clinicians and regulatory specialists, Strand emphasizes rigorous quality management, adherence to applicable regulatory frameworks and continuous validation of its algorithms and assays. The company also engages in translational research, publishing and collaboration activities to advance genomic medicine, generate real world evidence, and expand the clinical utility of molecular testing. Through a combination of technology, curated knowledgebases and clinician facing reporting, Strand aims to accelerate personalized treatment planning, improve patient outcomes and help integrate genomics into routine clinical care.

4.4 MapmyGenome India Ltd.

Royal Demeure, Plot No. 12/2, Sector-1, HUDA Techno Enclave,

Madhapur, Hyderabad, Telangana

India

4.4.1 Company Basic Information and Its Competitors

TABLE 12 MAPMYGENOME INDIA LTD. BASIC INFORMATION AND ITS COMPETITORS

| # | Item | Description |
|---|---------------------|--|
| 1 | Company Name | MapmyGenome India Ltd. |
| 2 | Website | www.mapmygenome.in |
| 3 | Competitors | HOL India Pvt Ltd (HARLEY of LONDON), MedGenome Labs Ltd., Strand Life Sciences Private Limited, 4baseCare Onco Solutions Pvt. Ltd., Canary Oncoceutics, Inc., Redcliffe Lifetech Pvt. Ltd., HaystackAnalytics Private Limited, Neuberger Diagnostics Pvt. Ltd., Dr. Lal PathLabs Ltd., Metropolis Healthcare Ltd. |

Source: MapmyGenome India Ltd., Company Publications, Primary Interviews, and DMR Research Analysis

4.4.2 MapmyGenome India Ltd. Product Category

4.4.2.1 OncoMap

MapmyGenome's OncoMap offers a comprehensive suite of advanced diagnostics for personalized cancer care. It enables early detection, risk assessment, and treatment guidance through next-generation sequencing assays and expert genetic counseling. The OncoMap portfolio includes tests for hereditary cancers and somatic mutations across multiple cancer types, such as BRCA 1,2 with HRR Genes Panel, BRCA MAP, Colon Cancer with Polyps, Comprehensive Leukemia Panels, Liquid Biopsy, Lymphoma Panels, DNA OncoScreen, and Pancreatic Cancer Panels, providing clinicians and patients with actionable insights for precision oncology.

4.4.2.2 BabyMap

MapmyGenome's BabyMap provides comprehensive screening and diagnostic tests across all stages of maternal, newborn, and child care, including preconception, prenatal, postnatal, infertility, IVF, and recurrent pregnancy loss (RPL). The preconception tests identify genetic risks, carrier status, and reproductive health factors to optimize fertility and reduce complications. Prenatal testing enables early detection of genetic disorders and congenital anomalies for informed interventions. Postnatal tests screen newborns for metabolic, genetic, and endocrine disorders to ensure timely care. Infertility, IVF, and RPL screenings uncover hereditary factors, chromosomal abnormalities, and gene mutations, supporting personalized treatment plans and improving pregnancy outcomes.

4.4.2.3 RareMap

MapmyGenome's RareMap provides comprehensive insights into rare inherited conditions, enabling early detection and personalized care. It includes genetic screening for Alpha Thalassemia, Beta Thalassemia, Cystic Fibrosis, Duchenne Muscular Dystrophy, Fatty Acid Oxidation Disorders, Huntington's Disease, Lysosomal Storage Disorders, and MTHFR Gene Polymorphism. These tests help assess risk, support informed family planning, and offer expert guidance for effective management of complex genetic conditions.

4.4.2.4 BodyMap

MapmyGenome's BodyMap test provides precise diagnoses and tailored treatment strategies, supporting individuals in managing uncommon health challenges. It helps assess risks and guide interventions across multiple organ systems, including the heart, gastrointestinal tract, kidneys, brain, and lungs. The panels offered include Comprehensive Cardiology Panel, Comprehensive Gastroenterology Panel, Comprehensive Nephrology Panel, Comprehensive Neurology Panel, and Comprehensive Pulmonology Panel, all helping assess relevant health conditions and improve clinical outcomes.

4.4.2.5 Other Tests

MapmyGenome's other genomic tests provide comprehensive insights for personalized healthcare and precision medicine. Whole Exome Sequencing (WES) sequences the exonic regions of DNA, covering all protein-coding genes to detect disease-causing mutations and aid in diagnosing complex conditions. Whole Genome Sequencing (WGS) analyzes the complete genome, identifying variants across all regions to support molecular diagnosis of heterogeneous, rare, and complex diseases.

Spoligotyping includes Spoligo TB and Smart TB, PCR-based tests for accurate and rapid detection and categorization of Mycobacterium tuberculosis, supporting clinical management, surveillance, and epidemiological studies. MedicaMap, a pharmacogenomics test, evaluates body's response to medicines across multiple specialties, enabling personalized medication decisions and dosage adjustments. Collectively, these tests help individuals and clinicians make informed, genomics-driven healthcare decisions.

4.4.2.6 Wellness Products

MapmyGenome offers a comprehensive suite of wellness products designed to provide personalized health insights through genomics, microbiome analysis, and epigenetics. These tests help individuals understand their genetic blueprint, optimize gut health, support healthy ageing, and enhance overall wellness, enabling informed lifestyle choices and proactive health management. The solutions include DNA-based health and wellness insights, ancestry analysis, gut microbiome analysis, pharmacogenomics for medication guidance, DNA-powered fitness and nutrition recommendations, DNA-based beauty insights, biological age assessment through DNA methylation, and mitochondrial wellness reports. MapmyGenome wellness products testing solution includes Genomepatri, Genomepatri Heritage, Mapmybiome, Stay Young, MedicaMap, Discover Yourself, Myfitgene, Beautymap, Look Better, Stay Informed, MapmyEpiGenome, MapmySpark and many more.

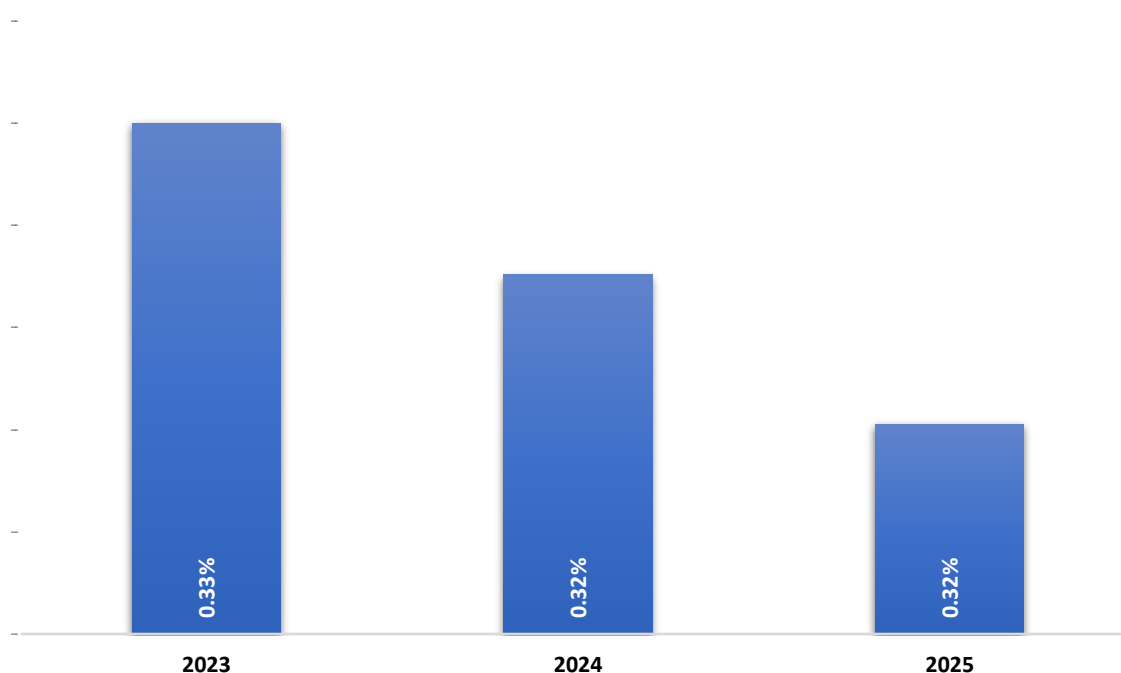
4.4.3 MapmyGenome India Ltd. Precision Medicine and Genomics Ecosystem Revenue (2023-2025)

TABLE 13 MAPMYGENOME INDIA LTD. PRECISION MEDICINE AND GENOMICS ECOSYSTEM REVENUE (USD MILLION) AND MARKET SHARE (2023-2025)

| MapmyGenome India Ltd. | 2023 | 2024 | 2025 |
|------------------------|-------|-------|-------|
| Revenue | 7.3 | 8.06 | 8.97 |
| Market Share | 0.33% | 0.32% | 0.32% |

Source: Secondary Sources, Company Publications, Primary Interviews, and DMR Research Analysis

FIGURE 32 MAPMYGENOME INDIA LTD. PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET SHARE (2023-2025)



Source: Secondary Sources, Company Publications, Primary Interviews, and DMR Research Analysis

4.4.4 MapmyGenome India Ltd. Recent Developments

TABLE 14 RECENT DEVELOPMENTS

| Date | Type | Description |
|--------------|-------------|--|
| May 29, 2025 | Acquisition | Mapmygenome, an AI-driven leader in genomics and personalized health, announced the strategic acquisition of Microbiome Insights, a global leader in microbial sequencing. The acquisition includes Microbiome Insights' CAP-accredited Canadian laboratory and rich intellectual property, boosting Mapmygenome's scientific prowess and enabling its global expansion. |

Source: Company publications & DMR Research Analysis

4.4.5 Main Business/Business Overview

Mapmygenome India Ltd. is a pioneering genomics and preventive healthcare company focused on delivering personalized health insights through advanced DNA-based testing solutions. Established in 2013, the company integrates genetics, lifestyle data, and health history to empower individuals and healthcare providers with actionable information for proactive health management. Its portfolio includes at-home DNA tests and clinical genomic diagnostics that address areas such as inherited conditions, lifestyle diseases, nutrition, fitness, and overall wellness. Mapmygenome also offers specialized solutions in microbiome analysis and genetic counseling, ensuring that users can interpret and apply their genetic information effectively. Leveraging accredited laboratories, bioinformatics pipelines, and global-quality standards, the company emphasizes scientific accuracy and personalization in every report. In addition to individual testing, it collaborates with hospitals, researchers, and corporate organizations to develop data-driven health programs. With a vision to improve health outcomes at scale, Mapmygenome continues to advance the adoption of genomics in everyday healthcare and preventive medicine.

4.5 4baseCare Onco Solutions Pvt. Ltd.

3rd floor, Summit B, Brigade Metropolis,

Garudacharpalya, Bengaluru, Karnataka 560048

India

4.5.1 Company Basic Information and Its Competitors

TABLE 15 4BASECARE ONCO SOLUTIONS PVT. LTD. BASIC INFORMATION AND ITS COMPETITORS

| # | Item | Description |
|---|---------------------|--|
| 1 | Company Name | 4baseCare Onco Solutions Pvt. Ltd. |
| 2 | Website | www.4basecare.com |
| 3 | Competitors | HOL India Pvt Ltd (HARLEY of LONDON), MedGenome Labs Ltd., Strand Life Sciences Private Limited, MapmyGenome India Ltd., Canary Oncoceutics, Inc., Redcliffe Lifetech Pvt. Ltd., HaystackAnalytics Private Limited, Neuberger Diagnostics Pvt. Ltd., Dr. Lal PathLabs Ltd., Metropolis Healthcare Ltd. |

Source: 4baseCare Onco Solutions Pvt. Ltd., Company Publications, Primary Interviews, and DMR Research Analysis

4.5.2 4baseCare Onco Solutions Pvt. Ltd. Product Category

4.5.2.1 Genomic Tests

4baseCare's Genomic Tests offer personalized cancer care powered by comprehensive genomic profiling, decoding critical biomarkers to guide treatment and monitor disease progression. Their HRD PARPredict test provides deep genomic scarring insights and evaluates the full homologous recombination repair (HRR) pathway from routine FFPE samples, enabling confident PARP inhibitor decisions. The Germline+ test identifies inherited mutations in patients with strong family history or early-onset cancers, helping guide preventive strategies and targeted therapies. Their test portfolio spans solid tumor tissue, liquid biopsy, SoLiQ, HRD, germline, and germline+ assays, measuring key genes and biomarkers for precision-guided cancer treatment. 4baseCare's test include Indiegene Solid, TARGET First Liquid, Germline+ and many more.

4.5.2.2 OncoTwin

4baseCare's OncoTwin offers AI-powered clinical decision support by identifying the most similar real-world patients using clinico-genomic similarity and network algorithms, summarizing treatment journeys and outcomes with transparent rationale. It integrates similarity matching, network intelligence, and peer evidence to generate actionable insights, enabling personalized therapy recommendations based on genomic alterations, biomarkers, comorbidities, and treatment history. OncoTwin provides digital twin patient models, real-world outcome intelligence, and adaptive evidence engines that continuously update insights from the latest studies, guidelines, and datasets. Clinicians receive structured Twin Reports with quantified similarity scores, comparative treatment trajectories, peer evidence summaries, and risk annotations. Additionally, it supports molecular tumour board discussions through integrated case views and evidence contextualization, linking genomic findings to guidelines, literature, and real-world cohort signals.

4.5.2.3 Global Cancer Diversity Atlas (GCDA)

4baseCare's Global Cancer Diversity Atlas (GCDA) is an atlas dedicated to capturing cancer's genomic diversity, designed to redefine cancer research and recognize global genomic variation across underrepresented populations. By uniting clinical partners, oncologists, and researchers across Asia, Latin America, Africa, and the Middle East, GCDA builds the most comprehensive real-world, multimodal cancer dataset, reflecting the full spectrum of human diversity and advancing precision oncology.

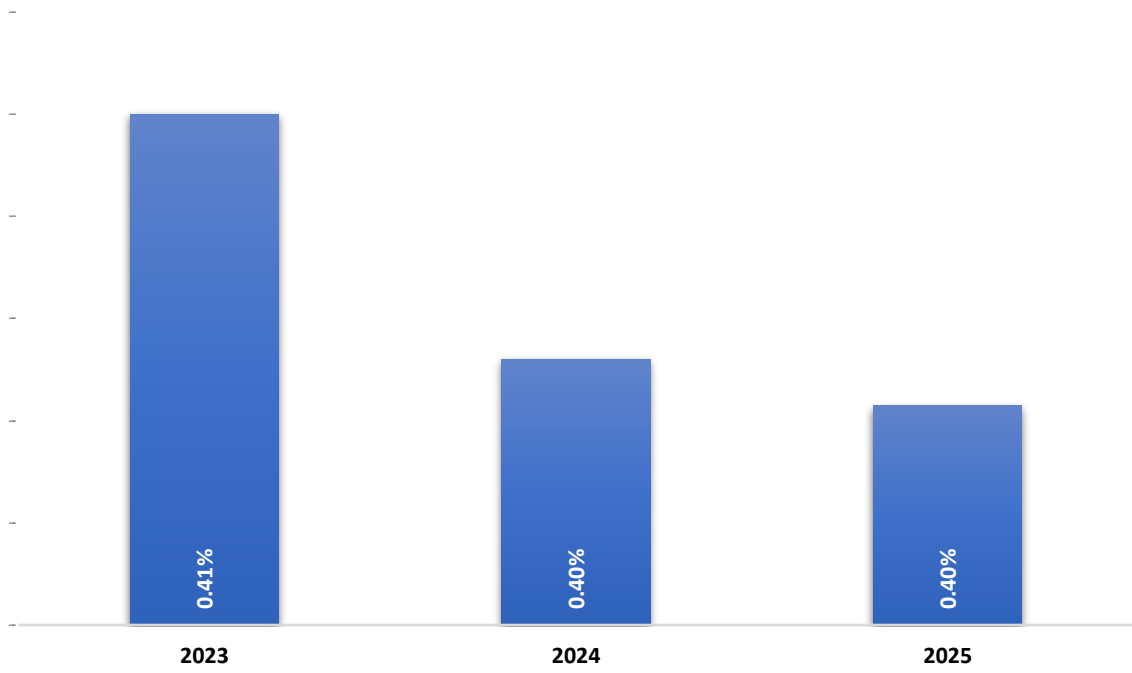
4.5.3 4baseCare Onco Solutions Pvt. Ltd. Precision Medicine and Genomics Ecosystem Revenue (2023-2025)

TABLE 16 4BASECARE ONCO SOLUTIONS PVT. LTD. PRECISION MEDICINE AND GENOMICS ECOSYSTEM REVENUE (USD MILLION) AND MARKET SHARE (2023-2025)

| 4baseCare Onco Solutions Pvt. Ltd. | 2023 | 2024 | 2025 |
|------------------------------------|-------|------|------|
| Revenue | 9.07 | 9.94 | 11.3 |
| Market Share | 0.41% | 0.4% | 0.4% |

Source: Secondary Sources, Company Publications, Primary Interviews, and DMR Research Analysis

FIGURE 33 4BASECARE ONCO SOLUTIONS PVT. LTD. PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET SHARE (2023-2025)



Source: Secondary Sources, Company Publications, Primary Interviews, and DMR Research Analysis

4.5.4 4baseCare Onco Solutions Pvt. Ltd. Recent Developments

TABLE 17 RECENT DEVELOPMENTS

| Date | Type | Description |
|--------------------------|-----------------------------------|---|
| March 02, 2026 | Memorandum of Understanding (MoU) | Bio Valley, 4baseCare, and Define Bio have signed an MoU to establish BioSphere, a Center of Excellence for Genomics and NGS at Andhra Pradesh MedTech Zone, Vizag. The CoE aims to strengthen India's genomic infrastructure, support early diagnostics, personalized treatments, large-scale dataset generation, and research collaborations, while training the next generation of scientists and informing public health policies nationwide. |
| February 24, 2026 | Collaboration | 4baseCare, has collaborated with France-based Owkin, an agentic AI company focused on Biological Artificial Superintelligence (BASl), to advance inclusive cancer research. Through this collaboration, the two companies will work together to convert fragmented cancer care data into AI-ready intelligence. The goal is to bridge the data gap and long-standing underrepresentation of Asian and Middle Eastern populations in cancer care and drug development. |
| February 3, 2026 | Collaboration | Caritas Hospitals in Kottayam has partnered with 4baseCare to advance personalized cancer care in Kerala. Using 4baseCare's genetic testing tools, doctors aim to gain deeper insights into patients' cancer profiles, enabling targeted treatments with fewer side effects. The collaboration also seeks to expand access to genomic testing and strengthen links between clinical research and practice. |
| Mar 31, 2026 | Memorandum of Understanding (MoU) | 4baseCare has signed a Memorandum of Understanding with the Government of Maharashtra to establish a Centre of Excellence for Precision Oncology in the state. The MoU aims to integrate genomic-driven cancer care into Maharashtra's public health system. As part of the collaboration, 4baseCare will deploy its OncoTwin platform, an AI-based tool that enables oncologists to derive treatment insights by |

mapping each patient's genomic and clinical profile against real-world outcomes datasets.

| | | |
|--------------------------|-------------|---|
| January 27, 2026 | Funding | 4baseCare raised ₹90 crore in the first close of its Series B round, co-led by Ashish Kacholia and Lashit Sanghvi, with participation from Yali Capital. The Bengaluru-based company will use the funds to expand its hospital-linked genomics lab network globally and scale its AI-driven precision oncology platform, OncoTwin, supporting faster, data-driven cancer care decisions. |
| December 14, 2024 | Acquisition | Infosys acquired a minority stake of up to 20% in healthcare deep-tech startup 4baseCare for ₹8.3 crore through its Innovation Fund. The investment aims to leverage 4baseCare's precision oncology solutions and population-specific genomic datasets, enabling AI-driven cancer diagnostics, treatment, and drug discovery, while jointly co-creating next-generation solutions to enhance healthcare and life sciences innovation. |

Source: Company publications & DMR Research Analysis

4.5.5 Main Business/Business Overview

4baseCare is a precision oncology company leveraging genomics, artificial intelligence, and real-world data to transform cancer care into a more personalized and inclusive model. The company is focused on addressing disparities in global cancer treatment by building population-relevant genomic datasets and translating them into clinically actionable insights. Its solutions integrate advanced genomic testing, clinico-genomic data analytics, and digital health platforms to support early diagnosis, treatment selection, and patient management. Through innovations such as comprehensive genomic profiling, AI-driven platforms, and real-world evidence programs, 4baseCare enables oncologists to make data-driven decisions tailored to individual patients. The company also collaborates with healthcare providers, research institutions, and pharmaceutical partners to expand access to precision medicine across diverse populations. With a strong emphasis on scalability, accessibility, and scientific rigor, 4baseCare is contributing to the evolution of cancer care toward a more equitable, data-driven, and patient-centric ecosystem.

4.6 Canary Oncoceutics, Inc.

20 E Thomas Rd, Suite 2203,

Phoenix, Arizona 85012,

United States

4.6.1 Company Basic Information and Its Competitors

TABLE 18 CANARY ONCOCEUTICS, INC. BASIC INFORMATION AND ITS COMPETITORS

| # | Item | Description |
|---|---------------------|--|
| 1 | Company Name | Canary Oncoceutics, Inc. |
| 2 | Website | www.canaryonco.com |
| 3 | Competitors | HOL India Pvt Ltd (HARLEY of LONDON), MedGenome Labs Ltd., Strand Life Sciences Private Limited, MapmyGenome India Ltd., 4baseCare Onco Solutions Pvt. Ltd., Redcliffe Lifetech Pvt. Ltd., HaystackAnalytics Private Limited, Neuberg Diagnostics Pvt. Ltd., Dr. Lal PathLabs Ltd., Metropolis Healthcare Ltd. |

Source: Canary Oncoceutics, Inc., Company Publications, Primary Interviews, and DMR Research Analysis

4.6.2 Canary Oncoceutics, Inc. Product Category

4.6.2.1 Canary Acuity

Canary Acuity from Canary Oncoceutics is a CLIA-certified and CAP-accredited Comprehensive Gene Profiling (CGP) test designed for solid and liquid tumors, examining over a thousand cancer-related genes, including unique genes not found in other tests. It provides an extensive analysis of DNA alterations, amplifications, deletions, fusions, tumor mutational burden, microsatellite instability, homologous recombination deficiency, and loss of heterozygosity, along with comprehensive germline variant testing and ACMG oncology analysis. The test delivers deep sequencing insights into cancer-relevant pathways and predictive treatment options, supporting tailored therapeutic strategies such as targeted therapy and immunotherapy.

Canary Acuity is performed on FFPE tissue or peripheral blood samples, with results provided in a clinically actionable format, making it a robust tool within the precision medicine and genomics ecosystem.

4.6.2.2 Canary Focus

Canary Focus from Canary Oncoceutics is a CLIA-certified and CAP-accredited focused gene panel for solid and liquid tumors, analyzing over a hundred cancer-related genes. The test detects SNVs, InDels, amplifications, and deletions, providing deep sequencing analysis, germline variant insights, and mapping of cancer-relevant pathways. Designed for patients seeking personalized treatment recommendations or longitudinal monitoring, Canary Focus helps guide targeted therapies and other actionable clinical interventions using FFPE tissue or peripheral blood samples, delivering precision medicine insights within a clinically validated framework.

4.6.2.3 Canary Pulse

Canary Pulse from Canary Oncoceutics is a liquid biopsy test that analyzes circulating tumor DNA from peripheral blood for all tumor types. It examines an extensive panel of 468 cancer-associated genes, providing deep sequencing analysis, germline variant insights, ACMG oncology analysis, and mapping of cancer-relevant pathways. By detecting DNA alterations and enabling enhanced predictive capabilities, Canary Pulse allows oncologists to monitor disease status, detect recurrence or progression earlier than conventional imaging, and make timely treatment decisions, delivering precision oncology insights for personalized patient care.

4.6.2.4 Canary Stat

The Canary Stat Focused Liquid Biopsy Panel by Canary Oncoceutics is designed for all solid tumors using peripheral blood samples. The test provides a comprehensive genomic analysis including 140 genes, pharmacogenomics markers, MSI markers, HRR genes, intronic fusions, and the TERT promoter. With features such as sensitivity, coverage, enhanced predictive capabilities, AI/ML technology, therapeutic guidance, smart reports, and clinically relevant insights, Canary Stat empowers personalized cancer care and supports informed clinical decision-making.

4.6.2.5 Canary HRD

The Canary HRD Gene Panel by Canary Oncoceutics is a precision medicine and genomics solution for solid tumors using FFPE samples. This test provides a comprehensive analysis of 41 HRR genes and includes features such as sensitivity, coverage, HRD scoring, AI/ML technology, therapeutic guidance, smart reports, and clinically relevant insights, empowering personalized cancer care and informed clinical decision-making.

4.6.2.6 Canary Stat Heredit

The Canary Stat Heredit Focused Hereditary Panel by Canary Oncoceutics is designed to identify genetic mutations associated with cancer risk. Using peripheral blood, saliva, or buccal swab samples, this test enables early detection, personalized prevention, tailored treatments, family risk assessment, and eligibility for targeted therapies. It provides a comprehensive analysis of 93 cancer genes, additional cancer-associated genes, PGx markers, and intronic fusions, with features including sensitivity, coverage, AI/ML technology, therapeutic guidance, smart reports, and clinically relevant insights to support informed, personalized cancer care.

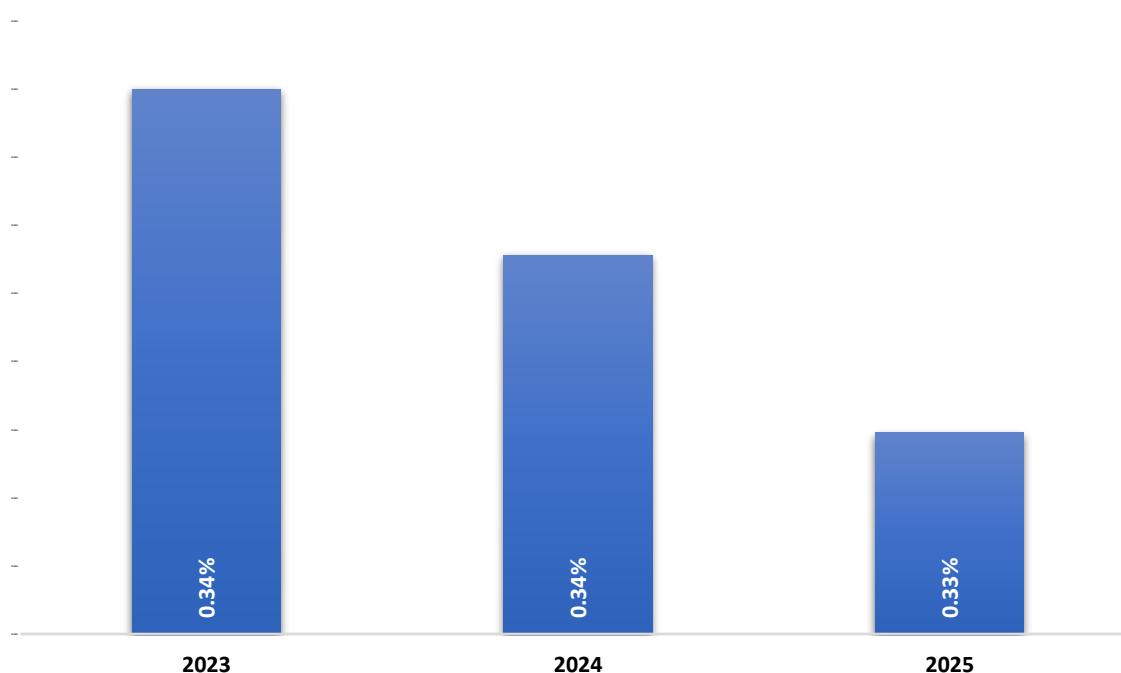
4.6.3 Canary Oncoceutics, Inc. Precision Medicine and Genomics Ecosystem Revenue (2023-2025)

TABLE 19 CANARY ONCOCEUTICS, INC. PRECISION MEDICINE AND GENOMICS ECOSYSTEM REVENUE (USD MILLION) AND MARKET SHARE (2023-2025)

| Canary Oncoceutics, Inc. | 2023 | 2024 | 2025 |
|--------------------------|-------|-------|-------|
| Revenue | 7.52 | 8.37 | 9.38 |
| Market Share | 0.34% | 0.34% | 0.33% |

Source: Secondary Sources, Company Publications, Primary Interviews, and DMR Research Analysis

FIGURE 34 CANARY ONCOCEUTICS, INC. PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET SHARE (2023-2025)



Source: Secondary Sources, Company Publications, Primary Interviews, and DMR Research Analysis

4.6.4 Main Business/Business Overview

Canary Oncoceutics is a leading cancer diagnostics company specializing in advanced genomic testing to support precision medicine. Founded by scientists from top academic institutions, the company is committed to quality, patient care, and safety, offering clinicians worldwide detailed insights into the genetic profiles underlying each patient's cancer. Canary Oncoceutics provides a comprehensive range of genomic tests, including comprehensive genomic profiling (CGP), focused gene panels, and circulating tumor DNA (ctDNA) tests, enabling personalized treatment strategies that optimize therapeutic outcomes while minimizing side effects. Its portfolio includes specialized solutions such as Canary Acuity, Canary Pulse, Canary Focus, Canary Stat, and Canary HRD, along with hereditary cancer panels. The company emphasizes collaboration with leading oncologists, researchers, and healthcare institutions to advance cancer genomics and innovation in personalized care. With CLIA-certified and CAP-accredited laboratories, Canary Oncoceutics combines technological excellence with a patient-centric approach, striving to transform cancer treatment, improve clinical decision-making, and provide hope to patients worldwide through precision oncology.

4.7 Redcliffe Lifetech Pvt. Ltd.

H-31, 2nd Floor, Electronic City,

Sector 63, Noida,

Uttar Pradesh 201301,

India

4.7.1 Company Basic Information and Its Competitors

TABLE 20 REDCLIFFE LIFETECH PVT. LTD. BASIC INFORMATION AND ITS COMPETITORS

| # | Item | Description |
|---|--------------|--|
| 1 | Company Name | Redcliffe Lifetech Pvt. Ltd. |
| 2 | Website | www.redcliffelabs.com |
| 3 | Competitors | HOL India Pvt Ltd (HARLEY of LONDON), MedGenome Labs Ltd., Strand Life Sciences Private Limited, MapmyGenome India Ltd., 4baseCare Onco Solutions Pvt. Ltd., Canary Oncoceutics, Inc., HaystackAnalytics Private Limited, Neuberg Diagnostics Pvt. Ltd., Dr. Lal PathLabs Ltd., Metropolis Healthcare Ltd. |

Source: Redcliffe Lifetech Pvt. Ltd., Company Publications, Primary Interviews, and DMR Research Analysis

4.7.2 Redcliffe Lifetech Pvt. Ltd. Product Category

4.7.2.1 Whole Genome Sequencing

Whole Genome Sequencing by Redcliffe Lifetech represents a comprehensive approach focused on decoding the complete genetic blueprint of an organism through de novo or reference-based methods. Resequencing supports genotyping and variation analysis using established reference sequences to identify genetic differences and mutations. De novo sequencing enables analysis of novel genomes without prior reference, assembling sequence reads into contigs with quality determined by continuity metrics such as N50 and gap distribution.

Hybrid sequencing integrates short-read and long-read technologies along with genome mapping and chromosome conformation methods to enhance assembly accuracy and structural resolution.

Mitochondrial DNA sequencing contributes to population genetics and disease studies through maternal inheritance patterns and association with various genetic disorders.

4.7.2.2 Whole Exome Sequencing

Whole Exome Sequencing by Redcliffe Lifetech represents a targeted genomic approach within the precision medicine and genomics ecosystem focused on analyzing exons, the protein-coding regions of the genome collectively known as the exome. Exons constitute a small fraction of the genome yet contain a high concentration of clinically relevant genetic information linked to biological function and disease. The method enables sequencing of these regions to capture a majority of disease-associated and functional variants. Analytical applications include identification of mutations associated with genetic disorders, oncology research, and population-level genomic studies. The approach supports precise detection of disease-causing variations, enhancing diagnostic accuracy and interpretation of genetic risk.

4.7.2.3 Shotgun Metagenomics Sequencing

Shotgun Metagenomics Sequencing by Redcliffe Lifetech represents a comprehensive analytical approach focused on sequencing all genetic material present in a complex biological sample. The method enables simultaneous assessment of genes across diverse microorganisms, providing a holistic view of microbial composition. This approach supports evaluation of bacterial diversity and identification of microbial abundance across varied biological contexts. High-resolution data generation facilitates insights into functional potential and interactions among microbial communities. The technique contributes to advanced microbiological research and enhances understanding of complex biological systems and health-related microbial dynamics.

4.7.2.4 Amplicon Sequencing

Amplicon Sequencing by Redcliffe Lifetech represents a targeted genomic approach within the precision medicine and genomics ecosystem focused on analyzing specific DNA regions for detailed genetic insights. 16S amplicon sequencing enables phylogenetic classification of microbial populations at genus or species level across diverse biological samples. ITS amplicon sequencing utilizes regions of the rRNA cistron, particularly ITS1, as a reliable marker for identification of fungal species in metagenomic analysis. The approach supports high-resolution profiling of microbial communities and enhances taxonomic accuracy in complex datasets.

Pooled amplicon sequencing enables focused assessment of genetic variation within selected genomic regions, supporting precise and efficient variant analysis.

4.7.2.5 CHIP Sequencing

CHIP Sequencing by Redcliffe Lifetech represents an advanced genomic technique focused on identifying genome-wide binding sites of transcription factors and DNA-binding proteins. The method involves crosslinking DNA-protein complexes followed by immunoprecipitation using specific antibodies to isolate targeted interactions. Captured DNA fragments undergo purification and sequencing to map protein-DNA interactions across the genome. The approach enables detailed understanding of regulatory mechanisms controlling gene expression and chromatin dynamics. Analytical insights support exploration of epigenetic regulation associated with disease pathways, developmental biology, and cancer progression.

4.7.2.6 Whole Genome Bisulphite Sequencing

Redcliffe Lifetech Whole Genome Bisulphite Sequencing represents a specialized approach focused on analyzing DNA methylation patterns across the genome. The method applies bisulphite treatment to convert unmethylated cytosines into uracil while preserving methylated cytosines, enabling accurate quantification through sequencing reads. This approach supports genome-wide mapping of epigenetic modifications associated with gene regulation and disease mechanisms. Reduced Representation Bisulphite Sequencing targets CpG-rich regions using restriction enzymes that cleave specific DNA sites, enabling focused methylation analysis. The technique facilitates investigation of methylation patterns at gene promoters and CpG islands, contributing to epigenetic research and clinical interpretation.

4.7.2.7 Transcriptome Sequencing

Transcriptome Sequencing by Redcliffe Lifetech represents a comprehensive analytical approach focused on profiling the complete set of RNA transcripts, including both coding and non-coding species. RNA sequencing enables detailed characterization of gene expression patterns and functional activity at the molecular level. Ribodepletion techniques remove abundant ribosomal RNA to enhance detection of functionally relevant mRNA and long non-coding RNA species. Targeted mRNA sequencing enriches polyadenylated transcripts to support focused analysis of protein-coding gene expression. Long non-coding RNA sequencing enables investigation of regulatory RNA molecules involved in transcriptional and post-transcriptional gene regulation.

4.7.2.8 GeoMX Digital Spatial Profiler

GeoMX Digital Spatial Profiler by Redcliffe Lifetech represents an advanced platform focused on high-plex profiling of RNA and proteins in a spatially resolved format. The technology enables localization of specific RNA or protein expression within tissue architecture, supporting deeper understanding of microenvironment-linked biological activity. The workflow combines standard immunofluorescence methods with molecular profiling tools to generate multiplexed spatial data from targeted biomarkers. Such integration supports precise characterization of tissue-level molecular patterns relevant to disease biology and translational research. Broad sample compatibility, including formalin-fixed paraffin-embedded and fresh frozen tissues, enhances utility across diverse research and clinical applications.

4.7.2.9 nCounter

nCounter by Redcliffe Lifetech represents a multiplex molecular profiling platform designed for sequence-specific analysis of numerous biological targets through molecular barcoding. The technology enables accurate digital measurement of gene expression and relative transcript abundance in a highly multiplexed format. Analytical utility extends across gene expression analysis, copy number analysis, microRNA profiling, and RNA or protein biomarker assessment. Broad sample compatibility supports use with tissue, cell lysates, blood, saliva, single-cell inputs, and challenging specimens such as formalin-fixed paraffin-embedded samples. The platform strengthens high-precision quantification workflows for RNA, microRNA, and DNA across diverse translational and clinical research applications.

4.7.2.10 NGS Genotyping

NGS Genotyping by Redcliffe Lifetech represents a sequencing-based analytical approach focused on discovery and genotyping of single nucleotide polymorphisms through high-throughput molecular methods. Genotyping-by-sequencing supports marker-assisted analysis by using molecular markers to investigate genetic variation and functional traits across biological samples. ddRAD sequencing serves as a flexible genotyping strategy for SNP discovery and genomic profiling without requiring prior reference genome availability. Microarray-based methods complement this framework through probe-driven binding to complementary DNA sequences, enabling parallel analysis of large sets of genes and genetic markers. The approach supports applications such as association studies, genomic diversity assessment, linkage analysis, molecular marker discovery, and selection-oriented genomic research.

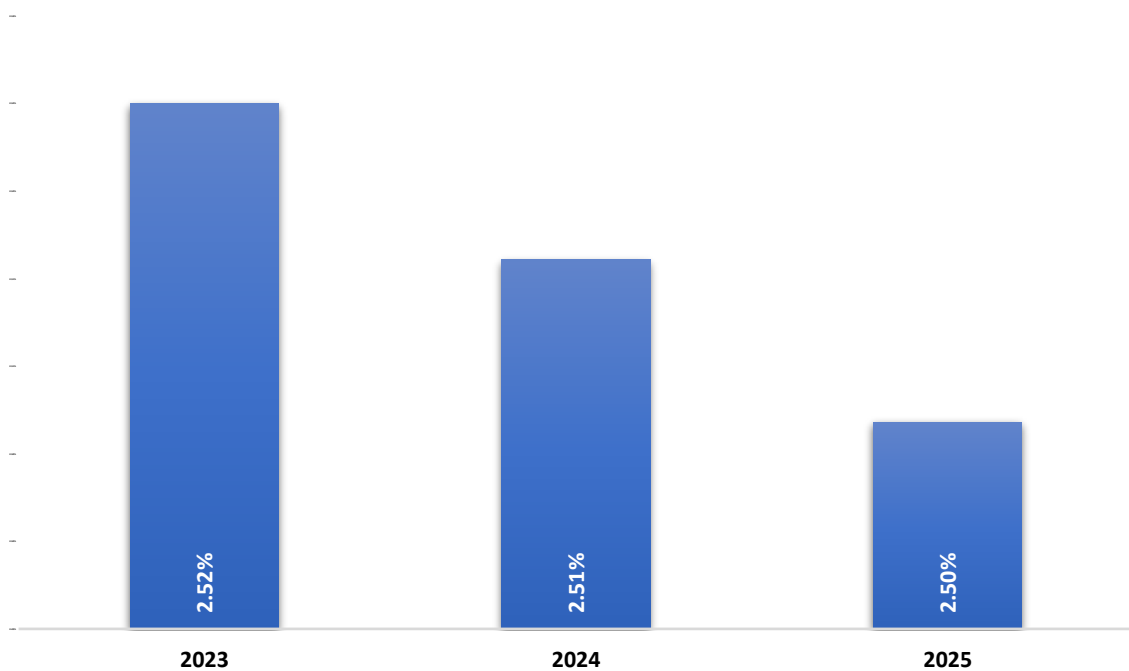
4.7.3 Redcliffe Lifetech Pvt. Ltd. Precision Medicine and Genomics Ecosystem Revenue (2023-2025)

TABLE 21 REDCLIFFE LIFETECH PVT. LTD. PRECISION MEDICINE AND GENOMICS ECOSYSTEM REVENUE (USD MILLION) AND MARKET SHARE (2023-2025)

| Redcliffe Lifetech Pvt. Ltd. | 2023 | 2024 | 2025 |
|------------------------------|-------|-------|------|
| Revenue | 55.8 | 62.7 | 71.1 |
| Market Share | 2.52% | 2.51% | 2.5% |

Source: Secondary Sources, Company Publications, Primary Interviews, and DMR Research Analysis

FIGURE 35 REDCLIFFE LIFETECH PVT. LTD. PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET SHARE (2023-2025)



Source: Secondary Sources, Company Publications, Primary Interviews, and DMR Research Analysis

4.7.4 Redcliffe Lifetech Pvt. Ltd. Recent Developments

TABLE 22 RECENT DEVELOPMENTS

| Date | Type | Description |
|---------------------------|-------------|--|
| September 23, 2024 | Acquisition | Redcliffe Labs announced the acquisition of Bengaluru-based Celara Diagnostics for an amount not exceeding INR 60 crore (\$7 million) on September 23, 2024, marking the company's second acquisition in the diagnostics space that year. Celara Diagnostics, which offered comprehensive radiology and pathology services including MRI, CT scans, and ultrasonography, reported INR 25 crore in revenue and INR 1.5 crore in profit for FY23. |
| September 17, 2024 | Fundraise | IFU announced a landmark investment of USD 20 million in Redcliffe Labs on September 17, 2024, to expand affordable diagnostic services across India, with the goal of reaching 10 million patients annually within five years. The funding aimed to double the number of NABL-accredited laboratories and increase the company's presence in Tier 2, Tier 3, and Tier 4 cities to serve underserved populations. |
| July 26, 2022 | Expansion | Redcliffe Labs announced the launch of a new satellite lab in Kolkata's Salt Lake City, as part of its aggressive expansion plans to increase its footprint across India. The 1,700 sq. ft. state-of-the-art facility, staffed with highly skilled pathologists and technicians, offered over 500 in-house tests and 1,000 health packages daily with reports delivered within 24 hours. |
| May 6, 2022 | Fundraise | Redcliffe Lifetech raised \$61 million in a funding round led by LeapFrog Investments, with participation from Healthquad, Schrodgers, LC Nueva, Growth Spark Ventures, and existing investors Chiratae Ventures and Alkemi Venture Partners. The investment was used to expand Redcliffe's geographic reach into Tier II, III, and IV cities across India, offering affordable pathology services from glucose to genetics at prices 25-60% lower than traditional competitors. |

Source: Company publications & DMR Research Analysis

4.7.5 Main Business/Business Overview

Redcliffe Lifetech Pvt. Ltd. is a fast-growing diagnostic healthcare company focused on improving access to affordable and high-quality testing services across India. Redcliffe Lifetech Pvt. Ltd. aims to bridge critical gaps in timely diagnosis by offering a wide spectrum of routine and specialized tests through a network of advanced laboratories and home sample collection services. With a digital-first approach, Redcliffe Labs integrates technology, automation, and data-driven processes to deliver accurate reports and enhance patient convenience. Its service model emphasizes accessibility, affordability, awareness, and accuracy, enabling individuals to take proactive control of their health. The company supports preventive healthcare by providing comprehensive diagnostic solutions ranging from basic pathology tests to advanced genetic and disease-specific screening. Operating across numerous cities, it combines clinical expertise with customer-centric platforms to streamline the diagnostic journey. By focusing on early detection and widespread availability of services, Redcliffe Labs is contributing to transforming India's diagnostic landscape and improving overall healthcare outcomes.

4.8 HaystackAnalytics Private Limited

CM 03, SINE, KReSIT Building 4th Floor,

Department of Computer Science, IIT Bombay, Powai, Mumbai - 400076

India

4.8.1 Company Basic Information and Its Competitors

TABLE 23 HAYSTACKANALYTICS PRIVATE LIMITED BASIC INFORMATION AND ITS COMPETITORS

| # | Item | Description |
|---|---------------------|---|
| 1 | Company Name | HaystackAnalytics Private Limited |
| 2 | Website | www.haystackanalytics.in |
| 3 | Competitors | HOL India Pvt Ltd (HARLEY of LONDON), MedGenome Labs Ltd., Strand Life Sciences Private Limited, MapmyGenome India Ltd., 4baseCare Onco Solutions Pvt. Ltd., Canary Oncoceutics, Inc., Redcliffe Lifetech Pvt. Ltd., Neuberg Diagnostics Pvt. Ltd., Dr. Lal PathLabs Ltd., Metropolis Healthcare Ltd. |

Source: HaystackAnalytics Private Limited, Company Publications, Primary Interviews, and DMR Research Analysis

4.8.2 HaystackAnalytics Private Limited Product Category

4.8.2.1 Universal Infectious Diseases Test

HaystackAnalytics' Universal Infectious Diseases Test is a life-saving diagnostic solution designed to upgrade current infection detection systems. It delivers rapid results with a turnaround time of ≤12 hours, covering 1200+ pathogens including bacteria and fungi, and offers high sensitivity (84–88%) and highest specificity (99%). Unlike traditional molecular panels or culture methods, UID is not limited by probes, provides high genotypic antimicrobial resistance information, and can be performed on-site without upskilling, making it easy and cost-effective to use. By enabling clinicians to know the infection before starting treatment, UID supports personalized therapy, ensures accuracy from start to finish, and promotes responsible antibiotic use to combat resistance.

4.8.2.2 QTB Test

HaystackAnalytics' ΩTB Test is a universal drug-resistance diagnostic solution for tuberculosis, enabling simultaneous evaluation of all resistance markers and differentiation between mixed infection, relapse, and reinfection. It delivers high sensitivity (85–98%) and specificity (99.8%), provides phylogenetic reconstruction and strain information, and identifies mixed infections and co-infections including NTM/MOTT. ΩTB is comprehensive, accurate, and affordable, with a test cost comparable to or lower than culture-based methods.

4.8.2.3 Identifi

HaystackAnalytics' PGx Comprehensive using NGS (Identifi) is a pharmacogenomics solution that uses Next-Generation Sequencing (NGS) to provide insights on a patient's genes influencing drug response. The test indicates which drugs should be not used, used with caution, or used as directed, along with dosage recommendations, and identifies genetic variants and metabolizer status that impact treatment efficacy. It helps improve patient care, reduces trial-and-error in drug selection, prevents adverse drug reactions, supports higher compliance and medication adherence, and is cost-effective and personalized. Identifi is essential for patients under treatment for cardiology, oncology, neurology, pain management, gastroenterology, those with a history of adverse drug reactions or poor response to medications, patients with complex medication regimens, and individuals undergoing surgery requiring anesthetic agents.

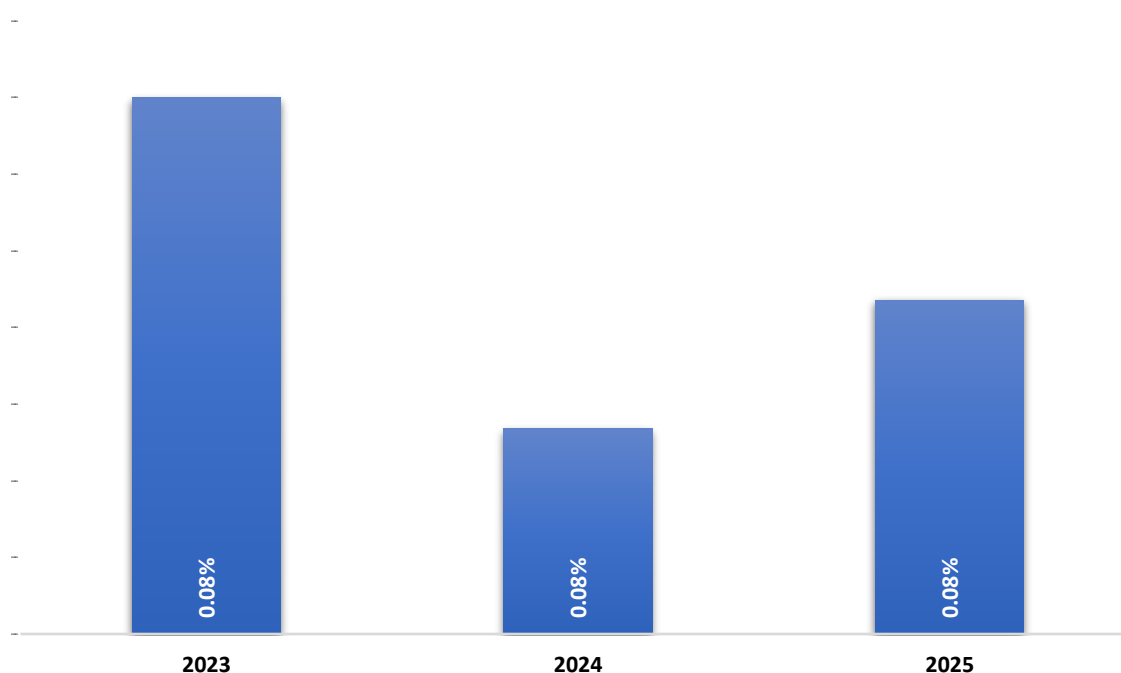
4.8.3 HaystackAnalytics Private Limited Precision Medicine and Genomics Ecosystem Revenue (2023-2025)

TABLE 24 HAYSTACKANALYTICS PRIVATE LIMITED PRECISION MEDICINE AND GENOMICS ECOSYSTEM REVENUE (USD MILLION) AND MARKET SHARE (2023-2025)

| HaystackAnalytics Private Limited | 2023 | 2024 | 2025 |
|-----------------------------------|-------|-------|-------|
| Revenue | 1.77 | 1.99 | 2.27 |
| Market Share | 0.08% | 0.08% | 0.08% |

Source: Secondary Sources, Company Publications, Primary Interviews, and DMR Research Analysis

FIGURE 36 HAYSTACKANALYTICS PRIVATE LIMITED PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET SHARE (2023-2025)



Source: Secondary Sources, Company Publications, Primary Interviews, and DMR Research Analysis

4.8.4 HaystackAnalytics Private Limited Recent Developments

TABLE 25 RECENT DEVELOPMENTS

| Date | Type | Description |
|----------------|---------|--|
| March 18, 2026 | Funding | HaystackAnalytics raised \$5 million, valuing it at about \$70 million. The company leveraged genomics to improve infectious disease diagnostics. Supported by DST, BIRAC, and DBT, it planned to expand clinical genomics solutions nationwide, enhance accessibility, and aimed to raise an additional \$25 million for global expansion and AI integration. |

Source: Company publications & DMR Research Analysis

4.8.5 Main Business/Business Overview

HaystackAnalytics Private Limited is a health technology company specializing in clinical genomics solutions designed to enable accurate and personalized diagnostic decision-making. The company focuses on developing next-generation sequencing (NGS)-based products for infectious disease diagnostics, with a strong emphasis on scalability and real-world clinical application. Its flagship innovations include genomics-based diagnostic tools for tuberculosis, which have been widely recognized for addressing critical public health challenges and were showcased at national innovation platforms. HaystackAnalytics is supported by leading scientific bodies such as the Department of Science and Technology (DST), Biotechnology Industry Research Assistance Council (BIRAC), and Department of Biotechnology (DBT), reinforcing its scientific credibility. With a multidisciplinary team combining expertise in genomics, molecular biology, data science, and healthcare operations, the company aims to bridge the gap between advanced genomic technologies and routine clinical practice, contributing to improved disease management and global health outcomes.

4.9 Neuberg Diagnostics Pvt. Ltd.

*No. 7, Industrial Estate,
Opp. to World Trade Center, Perungudi,
Chennai 600096, Tamil Nadu,
India*

4.9.1 Company Basic Information and Its Competitors

TABLE 26 NEUBERG DIAGNOSTICS PVT. LTD. BASIC INFORMATION AND ITS COMPETITORS

| # | Item | Description |
|---|--------------|---|
| 1 | Company Name | Neuberg Diagnostics Pvt. Ltd. |
| 2 | Website | www.neubergdiagnostics.com |
| 3 | Competitors | HOL India Pvt Ltd (HARLEY of LONDON), MedGenome Labs Ltd., Strand Life Sciences Private Limited, MapmyGenome India Ltd., 4baseCare Onco Solutions Pvt. Ltd., Canary Oncoceutics, Inc., Redcliffe Lifetech Pvt. Ltd., HaystackAnalytics Private Limited, Dr. Lal PathLabs Ltd., Metropolis Healthcare Ltd. |

Source: Neuberg Diagnostics Pvt. Ltd., Company Publications, Primary Interviews, and DMR Research Analysis

4.9.2 Neuberg Diagnostics Pvt. Ltd. Product Category

4.9.2.1 Inherited Genomics Testing

Inherited Genomics Testing by Neuberg Diagnostics Pvt. Ltd. represents a core component of the precision medicine and genomics ecosystem focused on identifying chromosomal and DNA-level variations responsible for inherited genetic disorders. The framework supports detection of genetic conditions manifesting during fetal development or later in life, enabling accurate diagnosis even in absence of family history. Molecular and cytogenetic techniques are integrated to confirm underlying genetic alterations associated with suspected disorders.

Analytical approaches span next-generation sequencing, targeted gene panels, mitochondrial genome analysis, and complementary non-sequencing methodologies for comprehensive evaluation.

The diagnostics includes Whole Exome Sequencing, Gene Panel Testing, Mitochondrial Genome Sequencing, MLPA, QPCR, Triplet Repeat Expansions, Sanger Sequencing, Karyotyping Test, FISH, Chromosomal Microarray, QF PCR for Aneuploidy Detection, and more.

4.9.2.2 Reproductive Genomics Testing

Neuberg Diagnostics Pvt. Ltd. Reproductive Genomics Testing represents a precision medicine approach focused on identifying genetic factors that can influence fertility, pregnancy outcomes, and reproductive decision-making. The framework covers pre-conception and post-conception evaluation, supporting carrier screening, infertility assessment, recurrent pregnancy loss analysis, prenatal screening, and prenatal diagnosis. Molecular testing and genetic counselling contribute to clearer interpretation of inherited risks and chromosomal abnormalities affecting reproductive health. The approach also includes pre-implantation genetic testing and advanced prenatal genomic methods to support informed clinical management across the reproductive pathway. The diagnostics includes Carrier Screening, Infertility Testing, Recurrent Pregnancy Loss Testing, Pre Implantation Genetic Testing, OpERA, CytoONE, Prenatal Aneuploidy Testing by NGS, Non-Invasive Prenatal Testing, Chromosomal Microarray Prenatal, Prenatal ORION, QF PCR, Karyotyping, and Maternal Cell Contamination.

4.9.2.3 Cancer Genomics Testing

Cancer Genomics Testing by Neuberg Diagnostics Pvt. Ltd. represents a precision medicine approach focused on identifying genomic alterations and gene expression changes associated with tumour development and inherited cancer susceptibility. The framework covers both somatic and hereditary cancer evaluation, enabling molecular characterization of tumour-specific mutations as well as germline alterations linked to cancer risk. Analytical applications support lung, breast, colorectal, and other cancer types through targeted mutation profiling, companion diagnostics, and inherited cancer assessment. Molecular insights strengthen treatment selection, immunotherapy decision support, risk stratification, and family-level genetic evaluation in complex oncology care. The diagnostics includes Somatic Cancer Testing, Hereditary Cancer Testing, Lung Cancer Panel, Breast Cancer Testing, Colorectal Cancer Testing, Single Gene Test, Other Cancer Testing, Solid Tumor Mutation Panel, PDL1 by IHC, ALK by IHC, BRCA1/2 by NGS, BRCA1/2 by MLPA, Inherited Cancer Panel, and more.

4.9.2.4 Haemato Oncology

Haemato Oncology Testing by Neuberger Diagnostics Pvt. Ltd. represents a precision medicine approach focused on genetic analysis of blood disorders, hematologic malignancies, and related oncologic conditions through integrated molecular and cytogenetic methods. The framework supports diagnosis, screening, and disease characterization in cancers and non-solid blood disorders, strengthening early identification of clinically significant abnormalities. Molecular and chromosomal evaluation helps clarify disease biology, supports risk assessment, and informs treatment planning in complex hematologic cases. Analytical insights also contribute to disease monitoring and management by identifying genomic alterations associated with progression and therapeutic response. The diagnostics includes Bone Marrow Karyotyping, FISH, Molecular Haemato Oncology, Haem Panel, and Plasma Sequencing.

4.9.2.5 Transplant Immunogenetics Testing

Transplant Immunogenetics Testing by Neuberger Diagnostics Pvt. Ltd. represents a precision medicine approach focused on evaluating genetic factors that influence immune response following tissue or organ transplantation. The framework supports assessment of transplant compatibility and rejection risk by identifying immune-related genetic variations before and after transplant procedures. Molecular insights help clarify recognition of transplanted tissue as foreign, enabling more informed immunosuppressive management and clinical decision-making. The approach also extends to immunogenetic evaluation of variations associated with immune dysfunction and autoimmune conditions linked to altered immune response pathways. The diagnostics includes transplant compatibility genetic screening, immunogenetic evaluation, rejection risk assessment, immune response profiling and more.

4.9.2.6 Pharmacogenomics Testing

Pharmacogenomics Testing by Neuberger Diagnostics Pvt. Ltd. represents a precision medicine approach focused on evaluating gene-drug interactions that influence medication response, dose requirements, and risk of adverse reactions across multiple therapeutic areas. The framework supports selection of suitable medicines, optimization of dosage, and reduction of trial-and-error prescribing through analysis of clinically relevant pharmacogenetic markers. Coverage spans multiple specialties and integrates guidance from established pharmacogenetic practice frameworks to support clinically informed prescribing decisions.

Molecular interpretation of variants in drug metabolism, transport, immune response, and toxicity pathways strengthens individualized treatment planning and improves medication safety. The diagnostics includes Pharmacogenomics Profile, and CYP2D6 Genotyping.

4.9.2.7 Personalized Genomics Testing

Personalized Genomics Testing by Neuberg Diagnostics Pvt. Ltd. represents a comprehensive approach within the precision medicine and genomics ecosystem focused on analyzing an individual's genome to guide health-related decisions across prevention, diagnosis, and treatment. The framework enables assessment of disease susceptibility, drug response variability, and risk of adverse reactions through integrated genomic analysis. Insights extend to nutrition metabolism, fitness response, stress adaptation, sleep patterns, and predisposition to weight variation, supporting tailored lifestyle optimization. Preventive genomics and carrier screening components strengthen early risk identification and informed reproductive planning through genetic evaluation. The diagnostics includes Nutrigenomics Profiling, Wellness Profiling, Preventive Genomics, Carrier Screening, Pharmacogenomics Screening and more.

4.9.2.8 DNA Fingerprinting Testing

Neuberg Diagnostics' DNA Fingerprinting Testing represents a genetic identification approach within the precision medicine and genomics ecosystem focused on analyzing short tandem repeat regions to generate a distinct genetic profile for individual-level differentiation and relationship assessment. The framework supports applications across molecular diagnostics, biological relationship evaluation, forensic investigation, and identity confirmation through analysis of unique DNA patterns. The workflow involves DNA extraction from biological samples, amplification of target regions through polymerase chain reaction, and fragment analysis through capillary electrophoresis or sequencing-based methods. Such testing enables reliable comparison of genetic signatures for paternity assessment, sibling analysis, maternity verification, transplant-related biological relationship establishment, and missing person identification. The diagnostics includes Paternity Testing, Sibling Relationship Testing, Biological Relationship Testing for Immigration, Biological Relationship Testing for Organ Transplant, Missing Person Identification, and Maternity Testing.

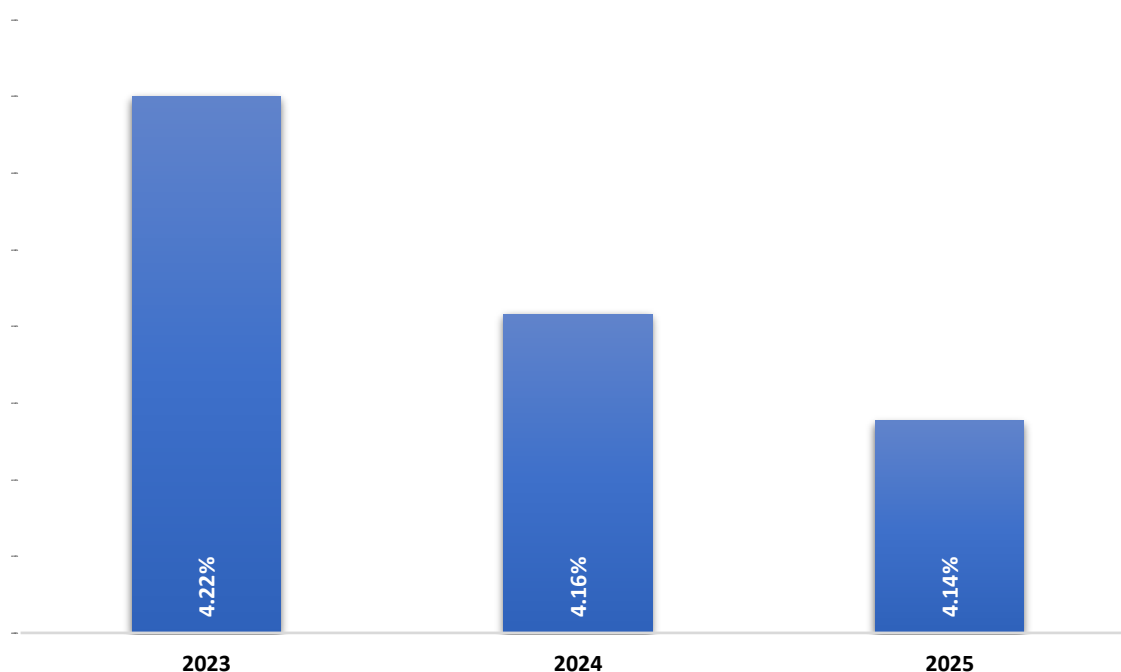
4.9.3 Neuberg Diagnostics Pvt. Ltd. Precision Medicine and Genomics Ecosystem Revenue (2023-2025)

TABLE 27 NEUBERG DIAGNOSTICS PVT. LTD. PRECISION MEDICINE AND GENOMICS ECOSYSTEM REVENUE (USD MILLION) AND MARKET SHARE (2023-2025)

| Neuberg Diagnostics Pvt. Ltd. | 2023 | 2024 | 2025 |
|-------------------------------|-------|-------|-------|
| Revenue | 93.4 | 104 | 117.6 |
| Market Share | 4.22% | 4.16% | 4.14% |

Source: Secondary Sources, Company Publications, Primary Interviews, and DMR Research Analysis

FIGURE 37 NEUBERG DIAGNOSTICS PVT. LTD. PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET SHARE (2023-2025)



Source: Secondary Sources, Company Publications, Primary Interviews, and DMR Research Analysis

4.9.4 Neuberg Diagnostics Pvt. Ltd. Recent Developments

TABLE 28 RECENT DEVELOPMENTS

| Date | Type | Description |
|------------------|-------------|--|
| March 26, 2026 | Launch | Neuberg Diagnostics announced the launch of the Mispa i60 blood test for early Alzheimer's detection at its Chennai OMR centre, offering a non-invasive, accurate, and cost-effective screening tool. The test leveraged p-tau and amyloid proteins to detect early pathological changes before cognitive decline began, with 45% of tested patients showing an elevated tau-to-amyloid ratio suggestive of Alzheimer's pathology. Dr. Asma Bibi, Chief of Laboratory, stated that the test helped differentiate Alzheimer's from other dementias, ensuring correct diagnosis and appropriate treatment. |
| October 27, 2025 | Partnership | Neuberg Diagnostics partnered with Vizag-headquartered Vijaya Medical Centre to expand its presence in Andhra Pradesh and Telangana, as announced at a programme in Visakhapatnam. The collaboration brought together Neuberg's global diagnostic expertise with Vijaya's 40 years of regional legacy to provide faster, more accurate pathology, radiology, and preventive health services. |
| January 10, 2025 | Investment | Kotak Alternate Asset Managers invested INR 940 crore in Neuberg Diagnostics on January 10, 2025, through its Kotak Strategic Situations India Fund II to support the company's inorganic expansion and IPO preparation. Neuberg, the fourth-largest diagnostics player in India with over 10,000 touch points and 250 laboratories across 250 cities, was founded by industry veteran GSK Velu. |

Source: Company publications & DMR Research Analysis

4.9.5 Main Business/Business Overview

Neuberg is a specialized oncopathology laboratory, offering advanced cancer diagnostic solutions with global standards of infrastructure and expertise. The laboratory focuses on delivering accurate, timely, and comprehensive diagnostic reports through a combination of routine histopathology and advanced techniques such as immunohistochemistry and molecular testing. Equipped with fully automated tissue processing systems and integrated staining platforms, it ensures precision and efficiency across a wide range of specimen types, including biopsies, surgical resections, and second opinion cases. Neuberg provides end-to-end diagnostic services, from tissue analysis to biomarker identification using technologies like fluorescence in situ hybridization (FISH), enabling insights for targeted therapies and precision medicine. Backed by a team of experienced surgical pathologists and supported by Neuberg Diagnostics' extensive global network, the laboratory contributes to improved cancer diagnosis and treatment planning while aligning with broader goals of innovation, accessibility, and quality-driven healthcare delivery.

4.10 Dr. Lal PathLabs Ltd.

*12th Floor, Tower B,
SAS Tower, Medicity, Sector 38,
Gurgaon 122001, Haryana,
India*

4.10.1 Company Basic Information and Its Competitors

TABLE 29 DR. LAL PATHLABS LTD. BASIC INFORMATION AND ITS COMPETITORS

| # | Item | Description |
|---|---------------------|---|
| 1 | Company Name | Dr. Lal PathLabs Ltd. |
| 2 | Website | www.lalpathlabs.com |
| 3 | Competitors | HOL India Pvt Ltd (HARLEY of LONDON), MedGenome Labs Ltd., Strand Life Sciences Private Limited, MapmyGenome India Ltd., 4baseCare Onco Solutions Pvt. Ltd., Canary Oncoceutics, Inc., Redcliffe Lifetech Pvt. Ltd., HaystackAnalytics Private Limited, Neuberg Diagnostics Pvt. Ltd., Metropolis Healthcare Ltd. |

Source: Dr. Lal PathLabs Ltd., Company Publications, Primary Interviews, and DMR Research Analysis

4.10.2 Dr. Lal PathLabs Ltd. Product Category

4.10.2.1 Pharmacogenomics Testing

Pharmacogenomics Testing by Dr. Lal PathLabs represents a precision medicine approach focused on analyzing genetic variations that influence drug metabolism, efficacy, and toxicity across therapeutic pathways. The framework supports identification of gene mutations and polymorphisms associated with variable drug response, enabling optimized therapy selection and dosage adjustment. Molecular insights contribute to reducing adverse drug reactions and improving treatment outcomes through genotype-guided clinical decisions. The approach enhances personalized medicine by aligning pharmacological interventions with individual genetic profiles.

The diagnostics includes Fluorouracil Toxicity DPD Gene Mutation, Imatinib Resistance Mutation Analysis IRMA, CYP2C19 Genotyping, CYP3A4 Genotyping, FIP1L1 PDGFRA Gene Rearrangement Detection, MGMT Gene Analysis, and Warfarin Sensitivity Detection.

4.10.2.2 Genetic Disorders Testing

Genetic Disorders Testing by Dr. Lal PathLabs represents a comprehensive approach within the precision medicine and genomics ecosystem focused on identifying chromosomal abnormalities, gene mutations, and inherited conditions through molecular and cytogenetic analysis. The framework integrates techniques such as karyotyping, microarray analysis, sequencing methods, and targeted mutation detection to support accurate diagnosis of diverse genetic disorders. Analytical coverage spans neuromuscular conditions, metabolic disorders, neurogenetic syndromes, ophthalmic disorders, and rare inherited diseases. Molecular insights enable early detection, risk assessment, and informed clinical management while supporting genetic counselling and family planning decisions. The diagnostics includes Chromosome Analysis Karyotype Blood, Chromosome Analysis Karyotype Couple Blood, Amyotrophic Lateral Sclerosis Sequencing, Metachromatic Leukodystrophy Quantitative Test, Genetic Counselling, Buccal Smear for Barr Bodies, MTHFR Gene Mutation PCR, Genetic Mapping for Whole Genome, Duchenne Becker Muscular Dystrophy Gene Mutation, and more.

4.10.2.3 Prenatal Diagnosis Testing

Prenatal Diagnosis Testing by Dr. Lal PathLabs represents a precision medicine approach focused on early assessment of fetal health through integrated biochemical, cytogenetic, and molecular screening methods. The framework supports evaluation of chromosomal abnormalities, aneuploidy risk, developmental anomalies, and pregnancy-associated genetic concerns through maternal serum markers, chromosome analysis, and fluorescence in situ hybridization. Molecular and cytogenetic insights strengthen risk stratification during pregnancy and support timely clinical decision-making for confirmatory assessment and care planning. Analytical coverage spans maternal blood-based screening, amniotic fluid testing, chorionic villus evaluation, cord blood chromosome analysis, and targeted prenatal confirmation assays. The diagnostics includes Maternal Serum Screen Dual Marker, Maternal Serum Screen Quadruple Test, PAPP A, Inhibin A Pregnancy, Chromosome Analysis Amniotic Fluid, Chromosome Analysis Chorionic Villus, Chromosome Analysis Cord Blood, FISH Amnio One Probe Trisomy 21, FISH Amnio Two Probes Trisomy 13 and 21, FISH Amnio Three Probes Trisomy 18 X and Y, FISH Prenatal Confirmation of Aneuploidy Chromosomes 13 18 21 X and Y, and more.

4.10.2.4 Transplant Precision Diagnostics

Transplant Precision Diagnostics by Dr. Lal PathLabs represents a specialized component of the precision medicine and genomics ecosystem focused on surveillance, compatibility assessment, and complication monitoring in solid organ transplantation. The framework includes donor-derived cell free DNA analysis through targeted next-generation sequencing, enabling minimally invasive detection of transplanted organ injury and rejection while supporting immunosuppression management. Diagnostic coverage also extends to infectious screening before and after transplant procedures, combining molecular assays, serology, routine pathology, and viral detection to identify clinically relevant infectious risks in transplant recipients and donors. Such an approach strengthens longitudinal transplant monitoring through integrated molecular and laboratory evidence, improving diagnostic confidence across organ status evaluation and infection control. The diagnostics includes Donor Derived Cell Free DNA Liquid Biopsy for Solid Organ Transplant, Transplant Infectious Screening Profile and more.

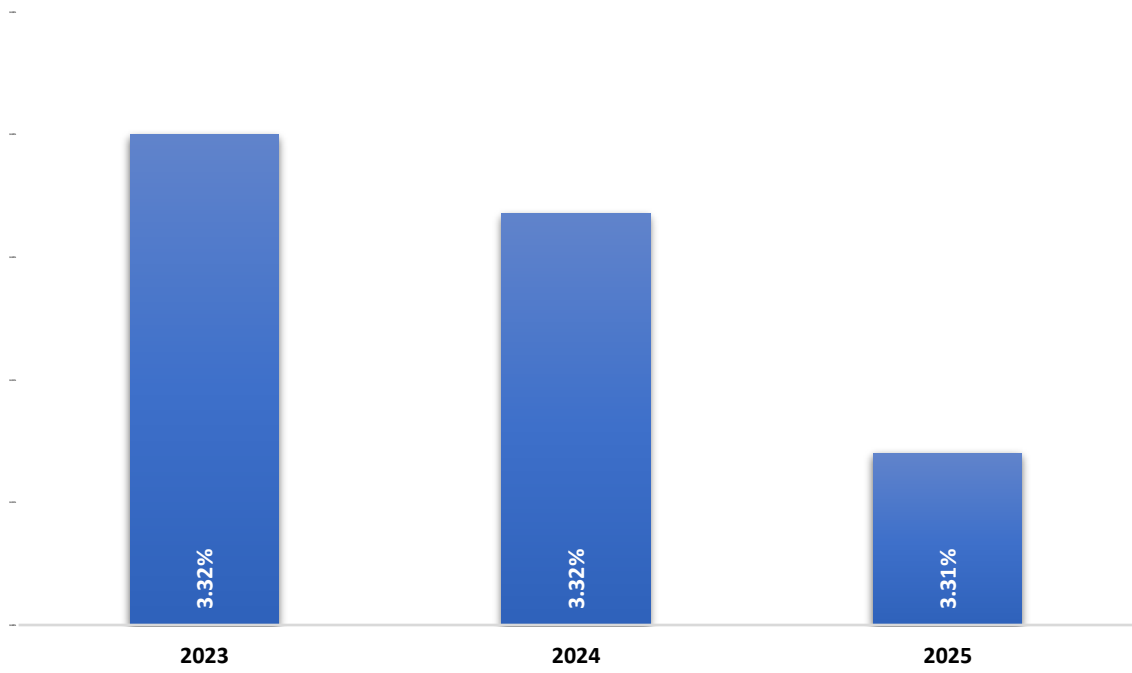
4.10.3 Dr. Lal PathLabs Ltd. Precision Medicine and Genomics Ecosystem Revenue (2023-2025)

TABLE 30 DR. LAL PATHLABS LTD. PRECISION MEDICINE AND GENOMICS ECOSYSTEM REVENUE (USD MILLION) AND MARKET SHARE (2023-2025)

| Dr. Lal PathLabs Ltd. | 2023 | 2024 | 2025 |
|-----------------------|-------|-------|-------|
| Revenue | 73.5 | 82.8 | 94 |
| Market Share | 3.32% | 3.32% | 3.31% |

Source: Secondary Sources, Company Publications, Primary Interviews, and DMR Research Analysis

FIGURE 38 DR. LAL PATHLABS LTD. PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET SHARE (2023-2025)



Source: Secondary Sources, Company Publications, Primary Interviews, and DMR Research Analysis

4.10.4 Dr. Lal PathLabs Ltd. Recent Developments

TABLE 31 RECENT DEVELOPMENTS

| Date | Type | Description |
|-------------------------|-------------|---|
| March 10, 2026 | Liquidation | Dr. Lal PathLabs received NCLT Mumbai Bench approval, for the voluntary liquidation of its wholly owned subsidiary Suburban Diagnostics (India) Private Limited, with the order received by the liquidator. The subsidiary, which contributed INR 164.03 crore in turnover and INR 126.62 crore in net worth as of March 31, 2024, had its business operations consolidated into the parent company effective March 18, 2025. |
| January 6, 2026 | Launch | Dr Lal PathLabs announced the launch of Sovaaka, a diagnostics-led Diagnostic Experience Centre focused on preventive and lifestyle healthcare, in Gurugram on January 6, 2026, at an event attended by Haryana Chief Minister Nayab Singh Saini. The centre offered wellness programmes including Eterna for women and Vita for men, integrating blood panels, genetic testing, AI-supported imaging, DEXA scanning, low-dose CT, and 1.5T MRI under the philosophy of Science Behind Wellness. |
| October 27, 2021 | Acquisition | Dr Lal PathLabs Limited announced the acquisition of 100% equity of Suburban Diagnostics (India) Private Limited in an all-cash deal on October 27, 2021, with an enterprise value of 18.5x FY22 audited EBITDA, subject to a floor of INR 925 crore and a cap of INR 1,150 crore. The acquisition, funded through existing cash reserves, gave Dr Lal PathLabs access to 44 laboratories and diagnostic centres and over 150 collection centres, primarily strengthening its footprint in Western India. |

Source: Company publications & DMR Research Analysis

4.10.5 Main Business/Business Overview

Dr. Lal PathLabs Ltd. is one of India's leading diagnostic healthcare service providers, offering a comprehensive range of pathology and laboratory testing services focused on accuracy, accessibility, and quality. Established in 1949, the company has evolved from a single laboratory into a nationwide network of clinical laboratories, patient service centers, and collection points. It operates a National Reference Laboratory supported by multiple regional and satellite labs, enabling efficient sample processing and timely reporting. Dr. Lal PathLabs provides a wide portfolio of diagnostic tests across routine health check-ups, disease-specific panels, and specialized diagnostics, catering to patients, hospitals, and healthcare providers. The company emphasizes the use of advanced technology, standardized processes, and accredited facilities to ensure reliable results. With a presence across numerous cities and international markets, it continues to expand its footprint while focusing on preventive healthcare, customer-centric services, and innovation, positioning itself as a trusted partner in improving health outcomes.

4.11 Metropolis Healthcare Ltd.

*4th Floor, East Wing,
Plot-254 B, Nirlon House,
Dr. Annie Besant Road, Worli,
Mumbai 400030, Maharashtra,
India*

4.11.1 Company Basic Information and Its Competitors

TABLE 32 METROPOLIS HEALTHCARE LTD. BASIC INFORMATION AND ITS COMPETITORS

| # | Item | Description |
|---|---------------------|--|
| 1 | Company Name | Metropolis Healthcare Ltd. |
| 2 | Website | www.metropolisindia.com |
| 3 | Competitors | HOL India Pvt Ltd (HARLEY of LONDON), MedGenome Labs Ltd., Strand Life Sciences Private Limited, MapmyGenome India Ltd., 4baseCare Onco Solutions Pvt. Ltd., Canary Oncoceutics, Inc., Redcliffe Lifetech Pvt. Ltd., HaystackAnalytics Private Limited, Neuberg Diagnostics Pvt. Ltd., Dr. Lal PathLabs Ltd. |

Source: Metropolis Healthcare Ltd., Company Publications, Primary Interviews, and DMR Research Analysis

4.11.2 Metropolis Healthcare Ltd. Product Category

4.11.2.1 Oncology Genomic Testing

Metropolis Healthcare Oncology Genomic Testing represents a precision medicine approach focused on tumour profiling and identification of actionable genetic alterations that inform evidence-based cancer management. The framework supports molecular characterization of malignancies, enabling stratified treatment selection, prognostic assessment, and improved clarity in complex clinical decision-making.

Analytical coverage spans hereditary risk evaluation, somatic mutation profiling, liquid biopsy testing, homologous recombination repair assessment, microsatellite instability analysis, and targeted panels for tumour-specific applications. Such testing strengthens alignment between molecular evidence and therapeutic strategy across solid tumours, hematologic malignancies, and treatment response monitoring. The diagnostics includes BRCA Germline, Advanced Hereditary Cancer Panel, BRCA1/BRCA2 Comprehensive, genecore Paradigm Comprehensive 22C3 Panel, Oncotype Dx, Lung Basic Gene Panel, Myeloid Panel, Oncomine Gene Panel, HLA Typing, Pulmocore Gene Panel PDL1 22C3, Colocore Targeted Panel MMR, Colocore Targeted Panel MSI PCR, genecore Somatic Endometrial, HRD Panel Tissue, HRD Panel Blood + Tissue, Metastatic HR+ Breast Cancer Panel, genecore Somatic Gene Panel, Liquicore Gene Panel, Liquicore CTC Comprehensive, Liquicore Gene Panel, and more.

4.11.2.2 Women and Child Health Genomic Testing

Metropolis Healthcare Women and Child Health Genomic Testing represent a precision medicine approach focused on reproductive health, prenatal assessment, paediatric disorders, and inherited conditions affecting maternal and child health. The framework supports carrier screening, prenatal diagnostics, chromosomal analysis, exome sequencing, and embryo-level genetic assessment to enable earlier detection of developmental abnormalities and congenital conditions. Molecular testing helps identify genetic causes of developmental delays, fetal anomalies, and inherited disorders, strengthening informed clinical management and family planning decisions. Genomic interpretation also supports reduction of diagnostic uncertainty and enables timely intervention through integrated cytogenetic and sequencing-based evaluation. The diagnostics includes NIPT Advance, NIPT, NIPT Reflex FISH for Trisomies, Fetal Whole Exome Panel for POC with MCC, Fetal Whole Exome Panel with QF PCR and MCC, Trio Whole Exome Gene Panel by NGS, Trio Clinical Exome Gene Panel by NGS, Trio Whole Exome Panel with QF PCR and MCC, Arrayfeto Panel, and more.

4.11.2.3 Neurology Genomic Testing

Metropolis Healthcare Neurology genomic testing represents a specialized approach within the precision medicine and genomics ecosystem focused on decoding complex genetic pathways associated with neurological conditions. The framework supports identification of inherited neuropathies, epilepsy syndromes, neurodevelopmental disorders, and degenerative diseases through advanced molecular analysis. Early genetic confirmation reduces diagnostic uncertainty and minimizes reliance on repetitive or inconclusive conventional investigations.

Analytical insights enable targeted therapeutic planning and structured genetic counselling aligned with disease etiology. The approach strengthens clinical decision-making through precise interpretation of genomic variations linked to neurological disorders. The diagnostics includes Exome Sequencing, Clinical Exome Sequencing, Spino Cerebellar Ataxia Panel, DMD Panel by MLPA, SMA Carrier Detection Panel by MLPA, Charcot Marie Tooth and Sensory Neuropathies Panel, and Autism Gene Panel.

4.11.2.4 Nephrology Genomic Testing

Metropolis Healthcare Nephrology Genomic Testing represent a precision medicine approach focused on identifying genetic contributors to chronic kidney disease and related renal disorders through molecular analysis. The framework supports differentiation between hereditary kidney conditions and acquired renal diseases, enabling refined and accurate diagnosis. Genomic insights assist in long-term disease management, including risk assessment, prognosis evaluation, and transplant-related decision-making. Molecular-level understanding of renal pathology enhances clinical counselling and supports development of targeted therapeutic strategies. The diagnostics includes Exome Sequencing, Nephrotic Syndrome Panel, Alport Syndrome Panel, Polycystic Kidney Disease Gene Panel, Xanthinuria Gene Panel, and Hereditary Hyperoxaluria Gene Panel.

4.11.2.5 Gastroenterology and Liver Disorders Testing

Metropolis Healthcare Gastroenterology and Liver Disorders Testing represent a precision medicine approach focused on identifying genetic contributors influencing gastrointestinal and hepatic disease progression and therapeutic outcomes. The framework supports diagnosis of inherited liver disorders, metabolic conditions, unexplained chronic liver disease, and specific gastrointestinal syndromes through molecular analysis. Genomic evaluation enables early identification of at-risk individuals and strengthens targeted disease management strategies aligned with underlying biology. Molecular insights enhance diagnostic confidence in cases presenting with atypical or unclear clinical features, supporting accurate clinical interpretation. The diagnostics includes Exome Sequencing, Hereditary Pancreatic Gene Panel, Hereditary Hemochromatosis Panel, UGT1A1 Gene Polymorphism Panel, Polycystic Liver Disease Gene Panel, Progressive Familial Intrahepatic Cholestasis Gene Panel, and Wilson Disease ATP7B Gene Panel.

4.11.2.6 Endocrinology Genomic Testing

Endocrinology Genomic Testing by Metropolis Healthcare represents a precision medicine approach focused on identifying genetic variations contributing to hormonal imbalances and endocrine disorders through molecular analysis. The framework supports diagnosis of inherited endocrine syndromes, unexplained growth abnormalities, and metabolic conditions with genetic etiology. Genomic insights enable tailored therapeutic strategies aligned with underlying molecular mechanisms and disease pathways. Risk assessment at the familial level strengthens preventive care and long-term disease management planning. The diagnostics includes Exome Sequencing, MODY Gene Panel, Hypercholesterolemia Gene Panel, Congenital Adrenal Hyperplasia Gene Panel, and Hereditary Pancreatic Gene Panel.

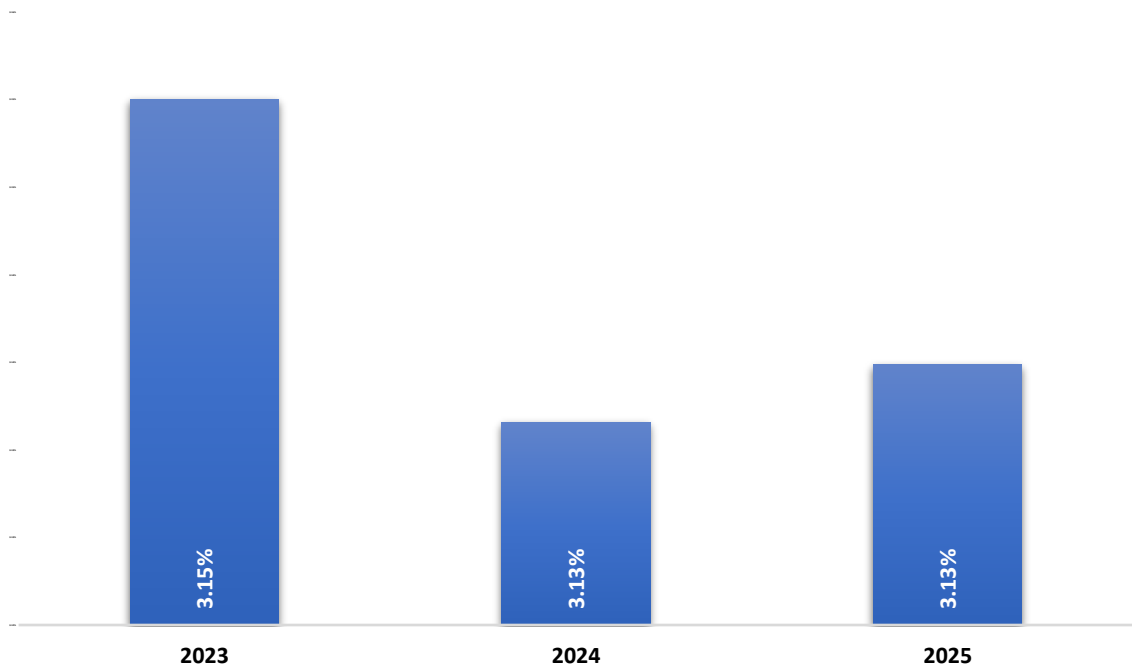
4.11.3 Metropolis Healthcare Ltd. Precision Medicine and Genomics Ecosystem Revenue (2023-2025)

TABLE 33 METROPOLIS HEALTHCARE LTD. PRECISION MEDICINE AND GENOMICS ECOSYSTEM REVENUE (USD MILLION) AND MARKET SHARE (2023-2025)

| Metropolis Healthcare Ltd. | 2023 | 2024 | 2025 |
|----------------------------|-------|-------|-------|
| Revenue | 69.7 | 78.2 | 89.1 |
| Market Share | 3.15% | 3.13% | 3.13% |

Source: Secondary Sources, Company Publications, Primary Interviews, and DMR Research Analysis

FIGURE 39 METROPOLIS HEALTHCARE LTD. PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET SHARE (2023-2025)



Source: Secondary Sources, Company Publications, Primary Interviews, and DMR Research Analysis

4.11.4 Metropolis Healthcare Ltd. Recent Developments

TABLE 34 RECENT DEVELOPMENTS

| Date | Type | Description |
|---------------------------|-------------|--|
| September 19, 2025 | Acquisition | Metropolis Healthcare finalized the acquisition of Kolhapur-based Ambika Pathology Laboratory for INR 17 crore on September 19, 2025, as part of its String of Pearls strategy to build robust regional clusters across India. The NABL-accredited lab, founded by Dr. Rajendra Sadashiv Patil, operated 12 patient touch points in Kolhapur with a turnover of INR 7.96 crore in FY25. |
| March 3, 2025 | Acquisition | Metropolis Healthcare announced the acquisition of Agra-based Scientific Pathology in an all-cash deal ranging between INR 55-83 crore, to strengthen its position in the western Uttar Pradesh market. The acquisition marked Metropolis's second deal that year, following its acquisition of Delhi NCR-based Core Diagnostics for INR 246.8 crore. With both acquisitions, the company expected the share of North India in its revenue to reach 13% in FY26, up from 8%. |
| December 10, 2024 | Acquisition | Metropolis Healthcare announced the acquisition of a 100% stake in Core Diagnostics, a Delhi NCR-based specialised cancer diagnostics company, for INR 246.8 crore, financed through 55% cash and 45% equity swap. Core Diagnostics, established in 2012, operated in 200 cities with a NABL- and CAP-accredited laboratory in Gurugram and reported revenues of INR 110 crore in FY 2023-24. |
| April 1, 2022 | Acquisition | Metropolis Healthcare Limited acquired 100% equity of Dr. Ganesan's Hitech Diagnostic Centre Private Limited and its subsidiary for INR 636 crore in cash in October 2021, following a previously announced INR 511 crore plus equity shares deal. Subsequently, Hitech's shareholders approved voluntary liquidation |

Source: Company publications & DMR Research Analysis

4.11.5 Main Business/Business Overview

Metropolis Healthcare Limited is a leading diagnostic service provider offering a comprehensive range of pathology and clinical laboratory testing services across India and international markets, including South Asia, Africa, and the Middle East. The company operates an extensive network of laboratories and collection centers, delivering services that support disease prediction, early detection, diagnosis, and monitoring. With a strong emphasis on quality and accuracy, Metropolis leverages advanced technologies and globally accredited laboratories to ensure reliable diagnostic outcomes. Its broad test portfolio includes routine investigations, specialized tests, and preventive health check-up packages tailored to diverse patient needs. The organization is recognized for its focus on innovation, regularly introducing advanced diagnostic techniques and expanding its specialized testing capabilities. Supported by a large team of pathologists, clinicians, and technicians, Metropolis integrates scientific expertise with customer-centric services such as home sample collection and digital reporting. Through continuous investment in infrastructure, quality assurance, and patient experience, the company aims to strengthen its leadership position in the diagnostics industry.

5 India Precision Medicine and Genomics Ecosystem Market Competition, by Players

5.1 India Precision Medicine and Genomics Ecosystem Market Revenue and Share by Players (2023-2025)

TABLE 35 INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET REVENUE (MILLION USD) BY PLAYERS (2023-2025)

| Company | 2023 | 2024 | 2025 |
|--------------------------------------|---------------|---------------|---------------|
| MedGenome Labs Ltd. | 95.6 | 107.7 | 121.8 |
| Strand Life Sciences Private Limited | 77.9 | 88.2 | 98.9 |
| MapmyGenome India Ltd. | 7.3 | 8.06 | 8.97 |
| 4baseCare Onco Solutions Pvt. Ltd. | 9.07 | 9.94 | 11.3 |
| Canary Oncoceutics, Inc. | 7.52 | 8.37 | 9.38 |
| Redcliffe Lifetech Pvt. Ltd. | 55.8 | 62.7 | 71.1 |
| HaystackAnalytics Private Limited | 1.77 | 1.99 | 2.27 |
| Neuberg Diagnostics Pvt. Ltd. | 93.4 | 104 | 117.6 |
| Dr. Lal PathLabs Ltd. | 73.5 | 82.8 | 94 |
| Metropolis Healthcare Ltd. | 69.7 | 78.2 | 89.1 |
| Others | 1721.2 | 1945.2 | 2219.3 |
| Total | 2212.6 | 2497.1 | 2843.7 |

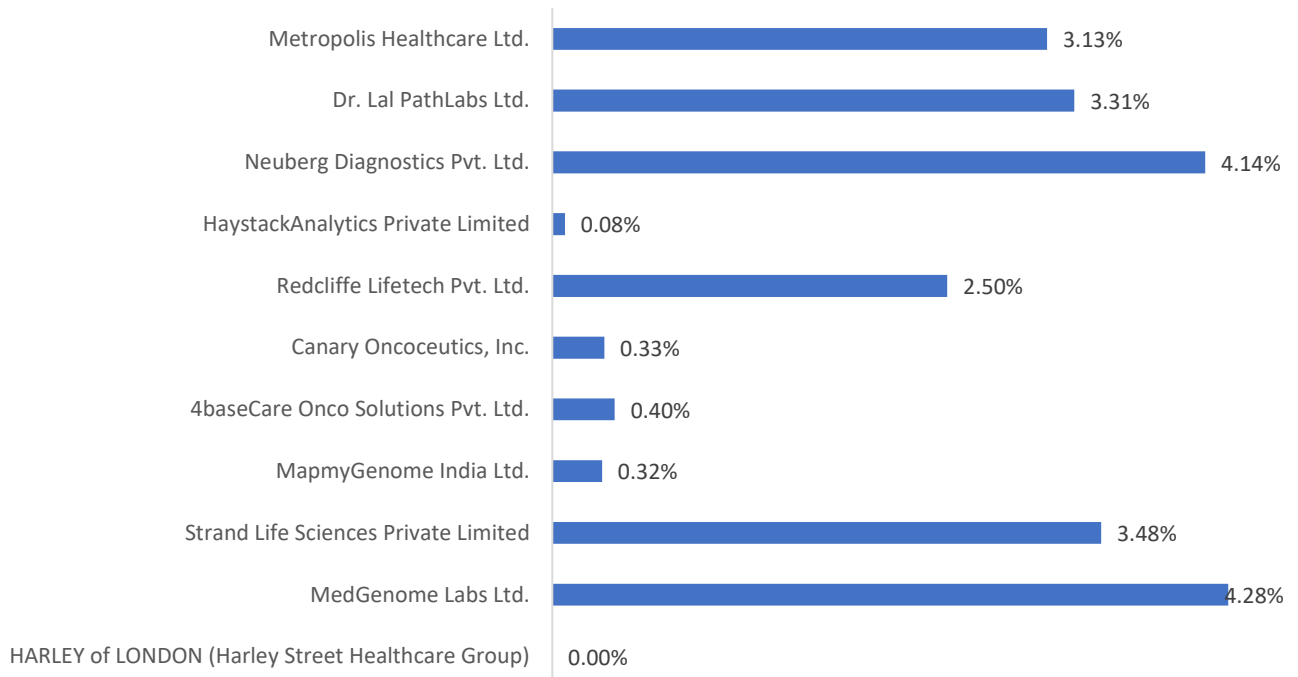
Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

TABLE 36 INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET REVENUE SHARE (%)
BY PLAYERS (2023-2025)

| Company | 2023 | 2024 | 2025 |
|--------------------------------------|---------------|---------------|---------------|
| MedGenome Labs Ltd. | 4.32% | 4.31% | 4.28% |
| Strand Life Sciences Private Limited | 3.52% | 3.53% | 3.48% |
| MapmyGenome India Ltd. | 0.33% | 0.32% | 0.32% |
| 4baseCare Onco Solutions Pvt. Ltd. | 0.41% | 0.4% | 0.4% |
| Canary Oncoceutics, Inc. | 0.34% | 0.34% | 0.33% |
| Redcliffe Lifetech Pvt. Ltd. | 2.52% | 2.51% | 2.5% |
| HaystackAnalytics Private Limited | 0.08% | 0.08% | 0.08% |
| Neuberg Diagnostics Pvt. Ltd. | 4.22% | 4.16% | 4.14% |
| Dr. Lal PathLabs Ltd. | 3.32% | 3.32% | 3.31% |
| Metropolis Healthcare Ltd. | 3.15% | 3.13% | 3.13% |
| Others | 77.8% | 77.9% | 78% |
| Total | 100.0% | 100.0% | 100.0% |

Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

FIGURE 40 INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET REVENUE SHARE BY PLAYERS IN 2025



Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

5.2 Market Concentration Rate

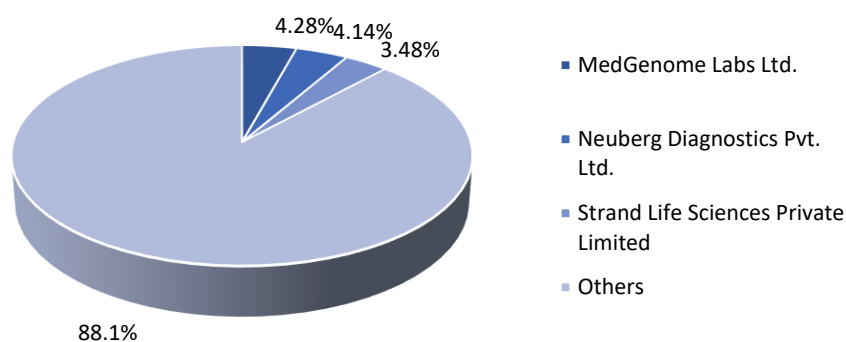
5.2.1 Top 3 Precision Medicine and Genomics Ecosystem Players Market Share

TABLE 37 TOP 3 PRECISION MEDICINE AND GENOMICS ECOSYSTEM PLAYERS MARKET SHARE

| Company | Market Share |
|--------------------------------------|--------------|
| MedGenome Labs Ltd. | 4.28% |
| Neuberg Diagnostics Pvt. Ltd. | 4.14% |
| Strand Life Sciences Private Limited | 3.48% |
| Others | 88.1% |

Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

FIGURE 41 INDIA TOP 3 PLAYERS PRECISION MEDICINE AND GENOMICS ECOSYSTEM REVENUE MARKET SHARE IN 2025



Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

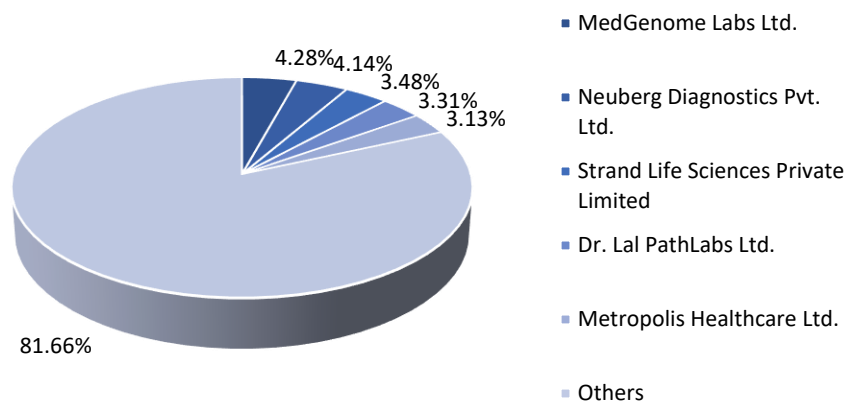
5.2.2 Top 5 Precision Medicine and Genomics Ecosystem Players Market Share

TABLE 38 TOP 5 PRECISION MEDICINE AND GENOMICS ECOSYSTEM PLAYERS MARKET SHARE

| Company | Market Share |
|--------------------------------------|--------------|
| MedGenome Labs Ltd. | 4.28% |
| Neuberg Diagnostics Pvt. Ltd. | 4.14% |
| Strand Life Sciences Private Limited | 3.48% |
| Dr. Lal PathLabs Ltd. | 3.31% |
| Metropolis Healthcare Ltd. | 3.13% |
| Others | 81.7% |

Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

FIGURE 42 INDIA TOP 5 PLAYERS PRECISION MEDICINE AND GENOMICS ECOSYSTEM REVENUE MARKET SHARE IN 2025



Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

6 India Precision Medicine and Genomics Ecosystem Market Segment by Type

6.1 India Precision Medicine and Genomics Ecosystem Market Revenue and Market Share by Type (2021-2025)

Precision Therapeutics Support segment was the highest contributor to the India Precision Medicine and Genomics Ecosystem market with USD 626.8 million in 2025, and is estimated to reach USD 1720.9 million by 2033, registering a CAGR of 13.6% during the forecast period. The Precision Diagnostics segment is estimated to reach USD 1347.8 million by 2033 at a CAGR of 13.1%. Precision Therapeutics Support and Precision Diagnostics segments collectively accounted for about 39.8% of the India Precision Medicine and Genomics Ecosystem market in 2025, with the former constituting around 22% share.

Clinical Bioinformatics and Interpretation Platforms segment is expected to grow at the fastest CAGR of 16.5% during the forecast period of 2026-2033. Clinical Bioinformatics and Interpretation Platforms segment is followed by Multi-omics Testing with a CAGR of 15.3%. Clinical Bioinformatics and Interpretation Platforms segment is expected to garner USD 607.4 million by 2033, while Multi-omics Testing is expected to reach a value of 770.7 by end of 2033.

TABLE 39 INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET REVENUE (MILLION USD) BY TYPE (2021-2025)

| Type | 2021 | 2022 | 2023 | 2024 | 2025 |
|--|---------------|---------------|---------------|---------------|---------------|
| Precision Diagnostics | 334.7 | 364.9 | 400.7 | 448.2 | 505.9 |
| Precision Therapeutics Support | 416.9 | 447.4 | 493 | 553.4 | 626.8 |
| Genomic Testing | 247.3 | 269.1 | 300.5 | 341.9 | 392.4 |
| Multi-omics Testing | 154.8 | 168.8 | 189 | 215.5 | 248 |
| Companion Diagnostics | 146.2 | 149.8 | 164.8 | 184.8 | 209 |
| Pharmacogenomics Solutions | 129.6 | 140.4 | 156.2 | 177 | 202.5 |
| Molecular Oncology and Tumor Profiling | 189.6 | 204.3 | 226.1 | 255 | 290.1 |
| Clinical Bioinformatics and Interpretation Platforms | 106.6 | 117.8 | 133.6 | 154.3 | 179.7 |
| Personalized Preventive Health and Wellness Genomics | 84.2 | 91.5 | 102 | 115.9 | 132.8 |
| Others | 41.3 | 43.3 | 46.7 | 51.2 | 56.6 |
| Total | 1851.2 | 1997.4 | 2212.6 | 2497.1 | 2843.7 |

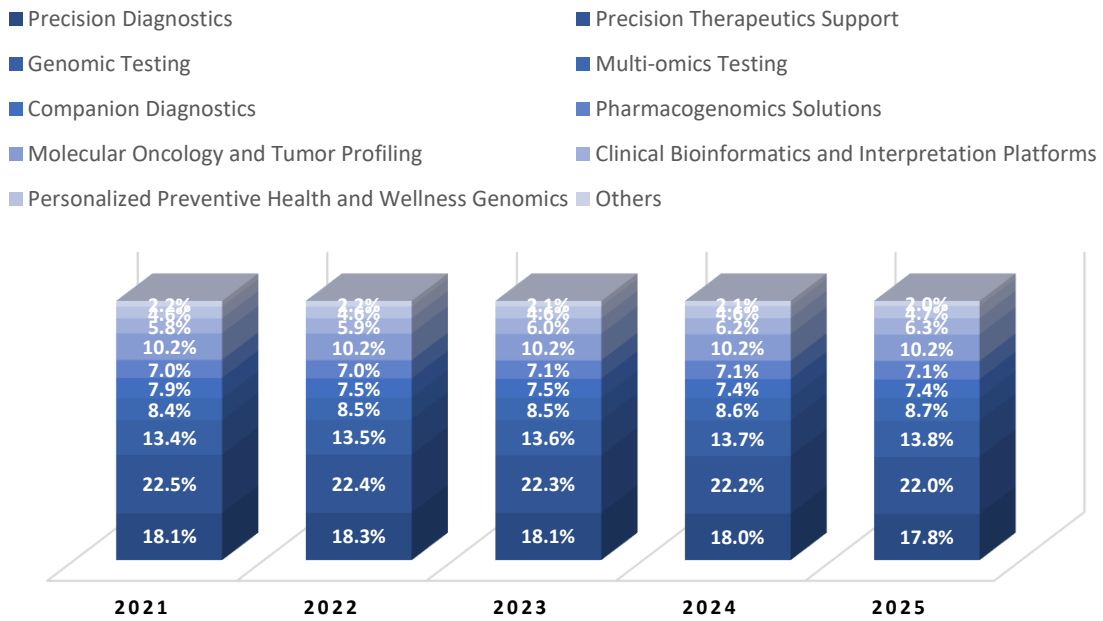
Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

TABLE 40 INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET REVENUE SHARE BY TYPE (2021-2025)

| Type | 2021 | 2022 | 2023 | 2024 | 2025 |
|--|----------------|----------------|----------------|----------------|----------------|
| Precision Diagnostics | 18.1% | 18.3% | 18.1% | 18% | 17.8% |
| Precision Therapeutics Support | 22.5% | 22.4% | 22.3% | 22.2% | 22% |
| Genomic Testing | 13.4% | 13.5% | 13.6% | 13.7% | 13.8% |
| Multi-omics Testing | 8.36% | 8.45% | 8.54% | 8.63% | 8.72% |
| Companion Diagnostics | 7.9% | 7.5% | 7.45% | 7.4% | 7.35% |
| Pharmacogenomics Solutions | 7% | 7.03% | 7.06% | 7.09% | 7.12% |
| Molecular Oncology and Tumor Profiling | 10.2% | 10.2% | 10.2% | 10.2% | 10.2% |
| Clinical Bioinformatics and Interpretation Platforms | 5.76% | 5.9% | 6.04% | 6.18% | 6.32% |
| Personalized Preventive Health and Wellness Genomics | 4.55% | 4.58% | 4.61% | 4.64% | 4.67% |
| Others | 2.23% | 2.17% | 2.11% | 2.05% | 1.99% |
| Total | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% |

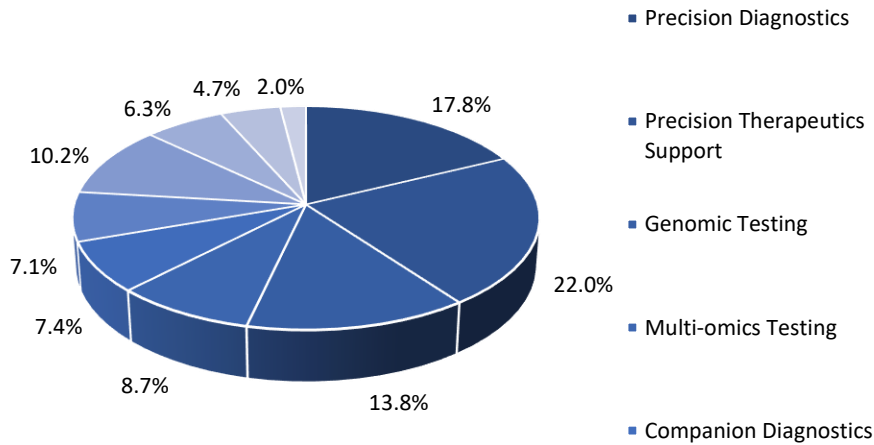
Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

FIGURE 43 INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET REVENUE SHARE BY TYPE (2021-2025)



Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

FIGURE 44 INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET REVENUE SHARE BY TYPE IN 2025

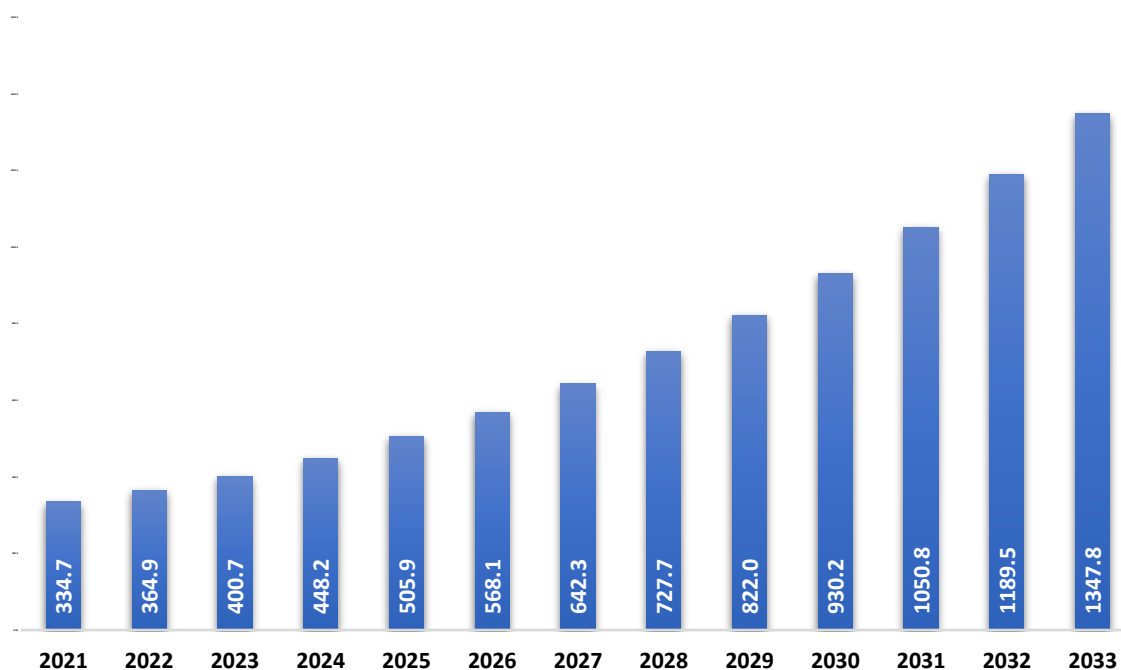


Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

6.2 Precision Diagnostics

The Precision Diagnostics segment was valued at 505.9 USD million in 2025 and accounted for 17.8% of Precision Medicine and Genomics Ecosystem Market in 2025. It is forecast to grow at a CAGR of 13.1% during 2026-2033 and it will be 1347.8 USD million in 2033.

FIGURE 45 PRECISION DIAGNOSTICS PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET
(2021-2033), USD MILLION

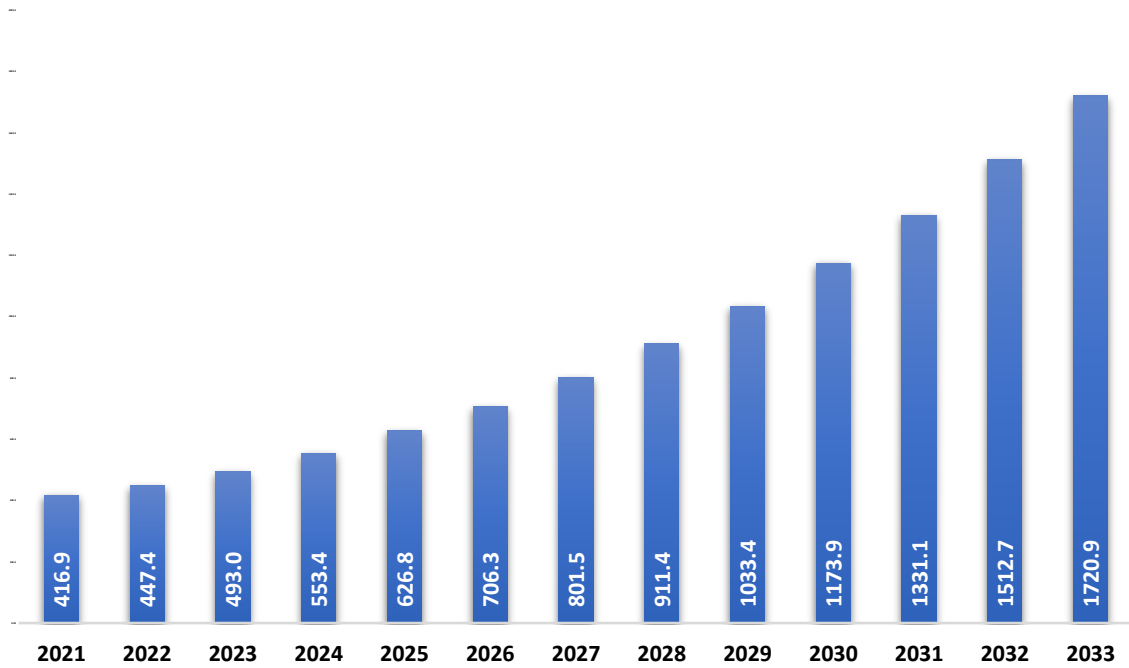


Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

6.3 Precision Therapeutics Support

The Precision Therapeutics Support segment was valued at 626.8 USD million in 2025 and accounted for 22% of Precision Medicine and Genomics Ecosystem Market in 2025. It is forecast to grow at a CAGR of 13.6% during 2026-2033 and it will be 1720.9 USD million in 2033.

FIGURE 46 PRECISION THERAPEUTICS SUPPORT PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION

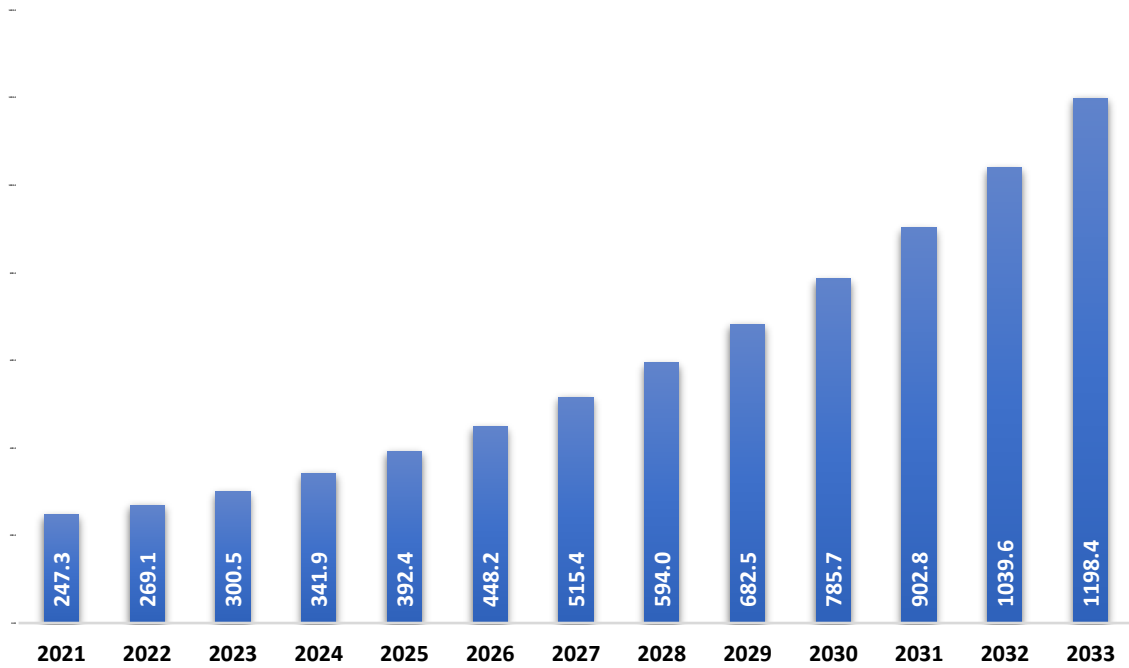


Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

6.4 Genomic Testing

The Genomic Testing segment was valued at 392.4 USD million in 2025 and accounted for 13.8% of Precision Medicine and Genomics Ecosystem Market in 2025. It is forecast to grow at a CAGR of 15.1% during 2026-2033 and it will be 1198.4 USD million in 2033.

FIGURE 47 GENOMIC TESTING PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION

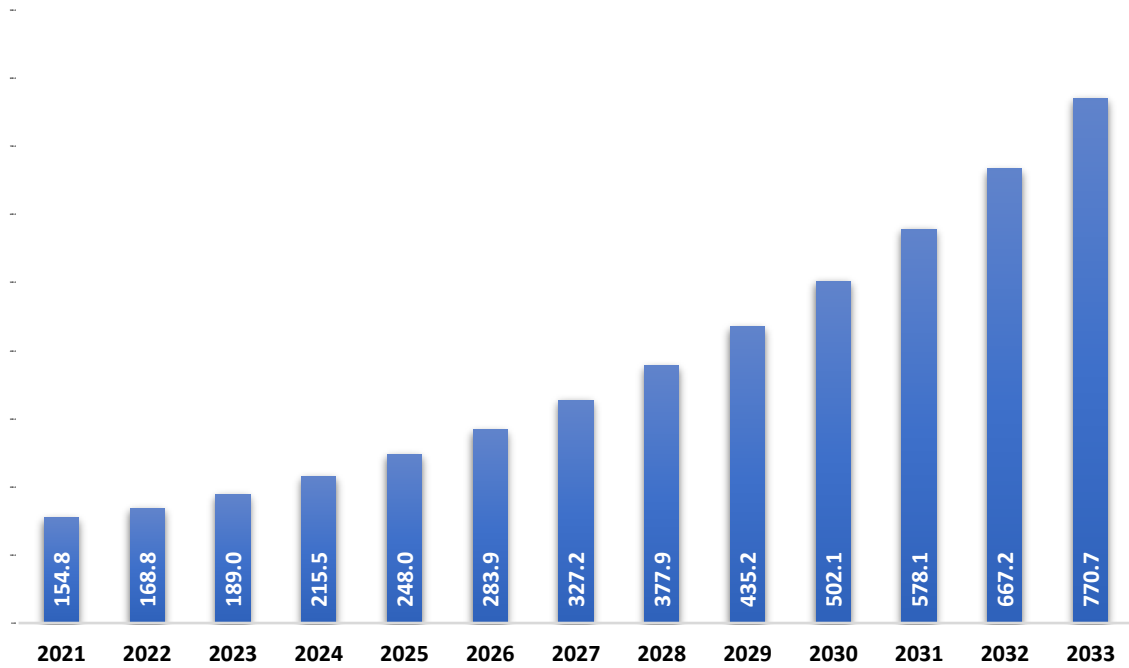


Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

6.5 Multi-omics Testing

The Multi-omics Testing segment was valued at 248 USD million in 2025 and accounted for 8.72% of Precision Medicine and Genomics Ecosystem Market in 2025. It is forecast to grow at a CAGR of 15.3% during 2026-2033 and it will be 770.7 USD million in 2033.

FIGURE 48 MULTI-OMICS TESTING PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION

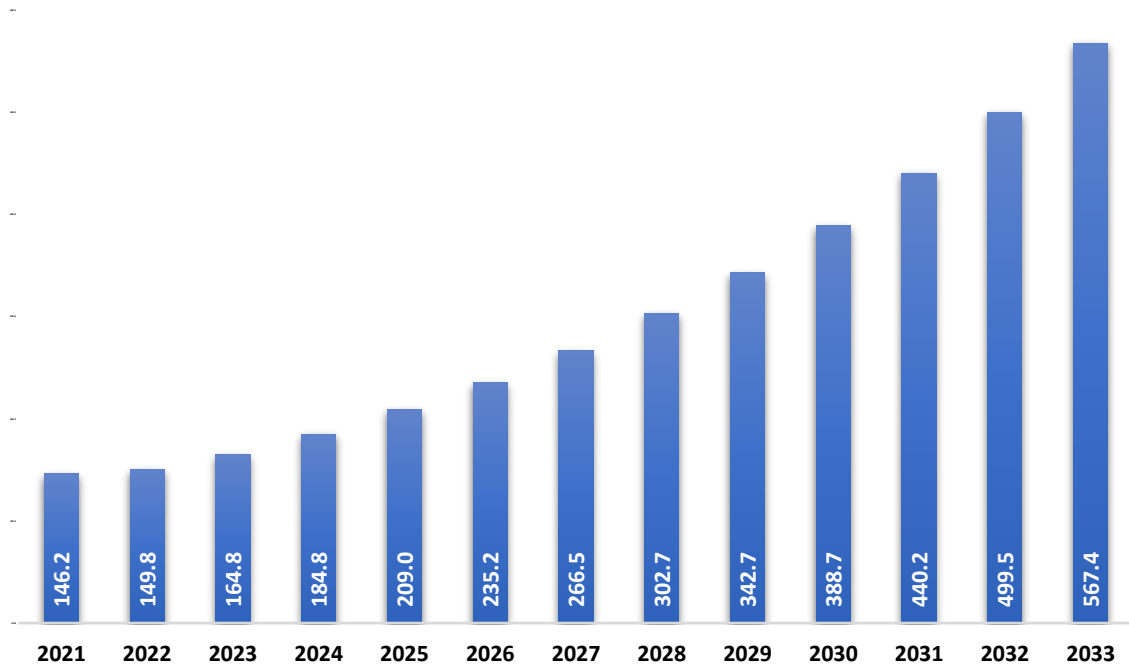


Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

6.6 Companion Diagnostics

The Companion Diagnostics segment was valued at 209 USD million in 2025 and accounted for 7.35% of Precision Medicine and Genomics Ecosystem Market in 2025. It is forecast to grow at a CAGR of 13.4% during 2026-2033 and it will be 567.4 USD million in 2033.

FIGURE 49 COMPANION DIAGNOSTICS PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION

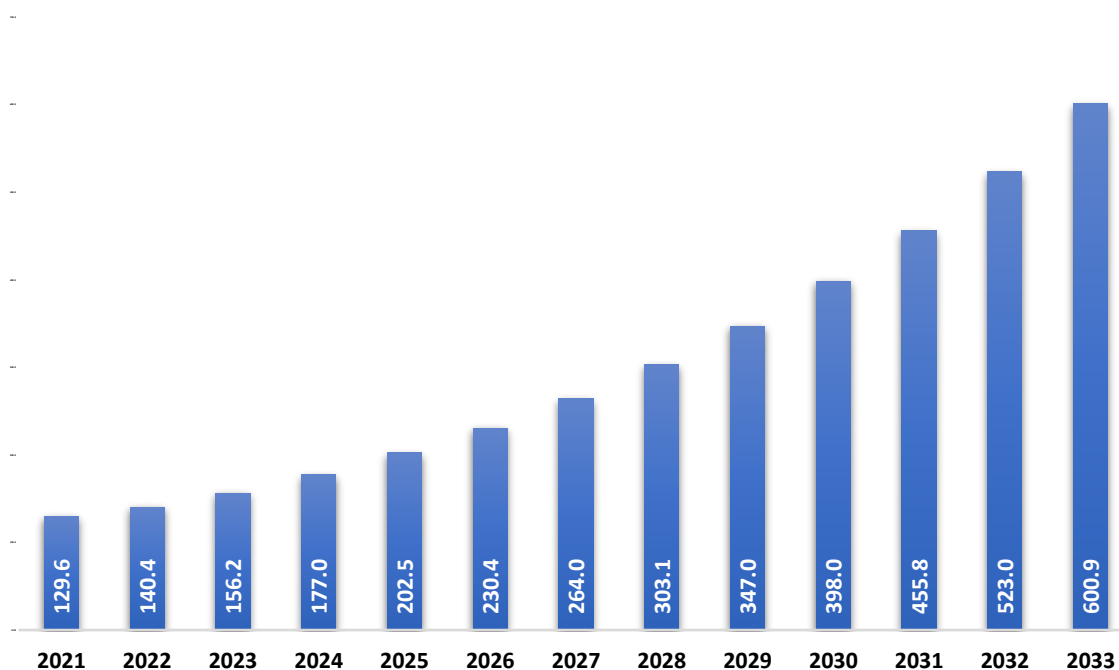


Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

6.7 Pharmacogenomics Solutions

The Pharmacogenomics Solutions segment was valued at 202.5 USD million in 2025 and accounted for 7.12% of Precision Medicine and Genomics Ecosystem Market in 2025. It is forecast to grow at a CAGR of 14.7% during 2026-2033 and it will be 600.9 USD million in 2033.

FIGURE 50 PHARMACOGENOMICS SOLUTIONS PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION

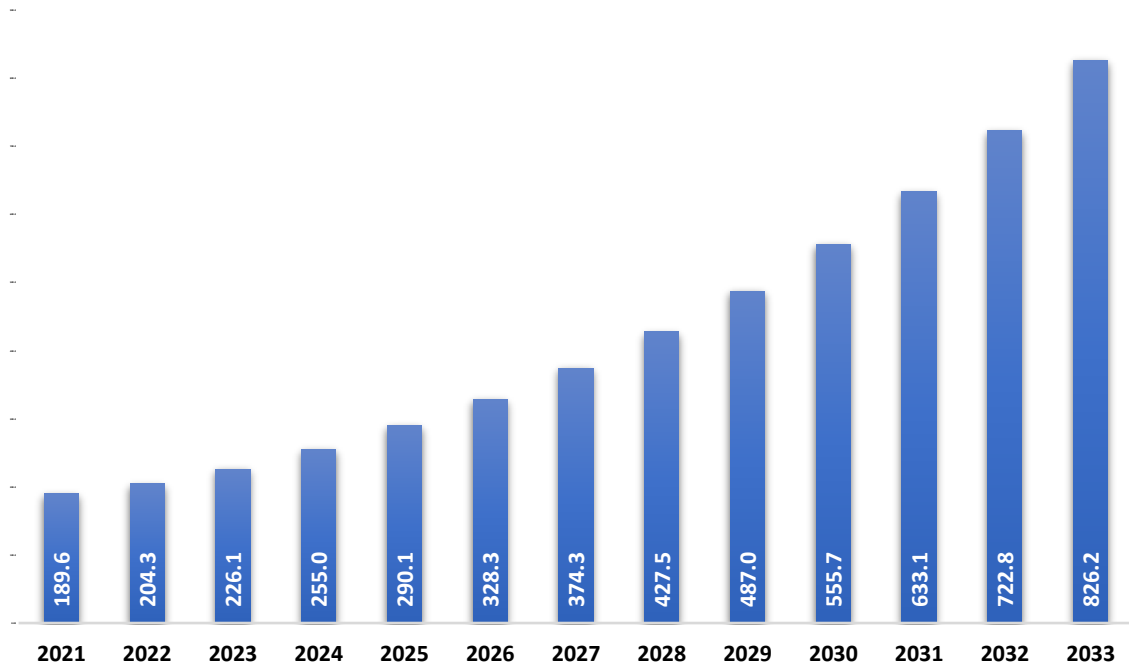


Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

6.8 Molecular Oncology and Tumor Profiling

The Molecular Oncology and Tumor Profiling segment was valued at 290.1 USD million in 2025 and accounted for 10.2% of Precision Medicine and Genomics Ecosystem Market in 2025. It is forecast to grow at a CAGR of 14.1% during 2026-2033 and it will be 826.2 USD million in 2033.

FIGURE 51 MOLECULAR ONCOLOGY AND TUMOR PROFILING PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION

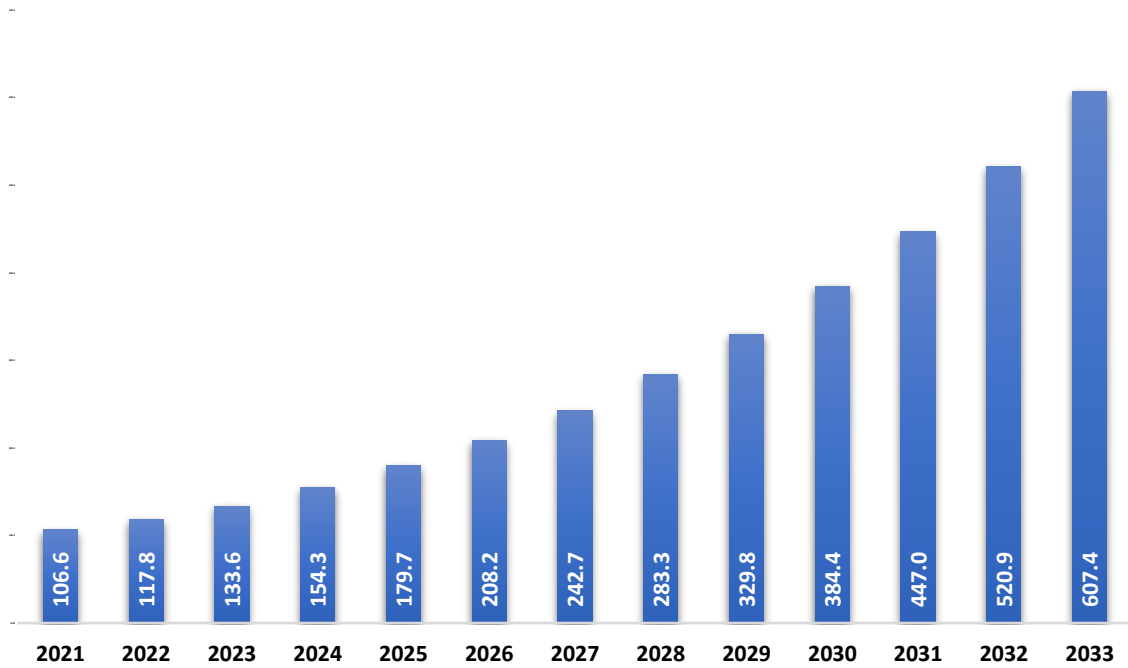


Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

6.9 Clinical Bioinformatics and Interpretation Platforms

The Clinical Bioinformatics and Interpretation Platforms segment was valued at 179.7 USD million in 2025 and accounted for 6.32% of Precision Medicine and Genomics Ecosystem Market in 2025. It is forecast to grow at a CAGR of 16.5% during 2026-2033 and it will be 607.4 USD million in 2033.

FIGURE 52 CLINICAL BIOINFORMATICS AND INTERPRETATION PLATFORMS PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION

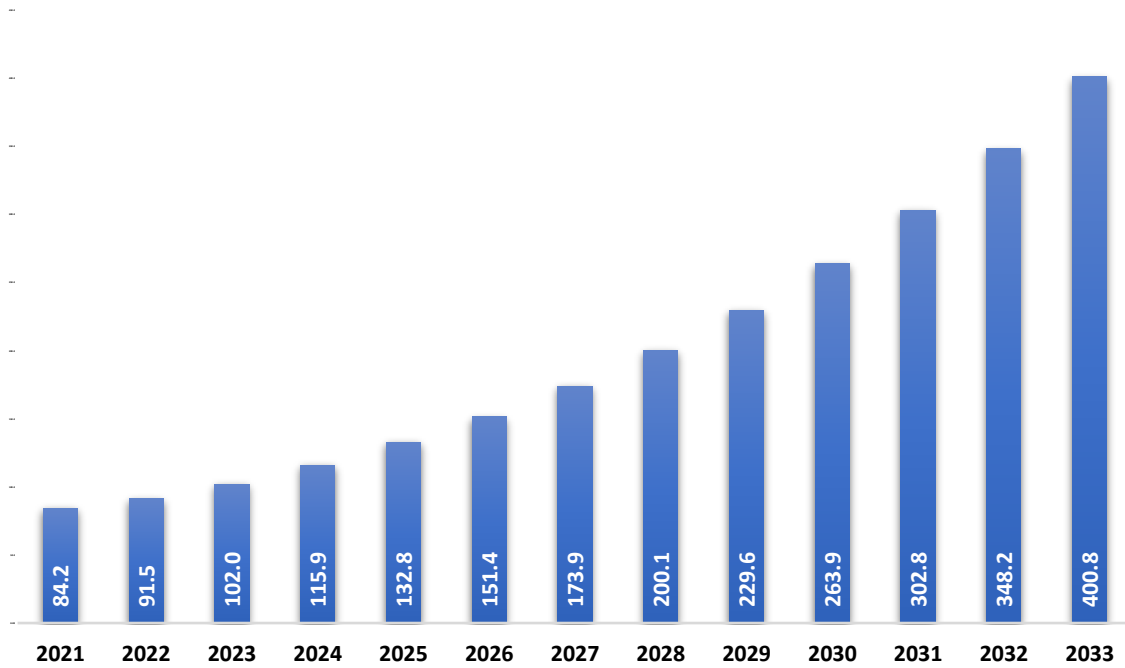


Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

6.10 Personalized Preventive Health and Wellness Genomics

The Personalized Preventive Health and Wellness Genomics segment was valued at 132.8 USD million in 2025 and accounted for 4.67% of Precision Medicine and Genomics Ecosystem Market in 2025. It is forecast to grow at a CAGR of 14.9% during 2026-2033 and it will be 400.8 USD million in 2033.

FIGURE 53 PERSONALIZED PREVENTIVE HEALTH AND WELLNESS GENOMICS PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION

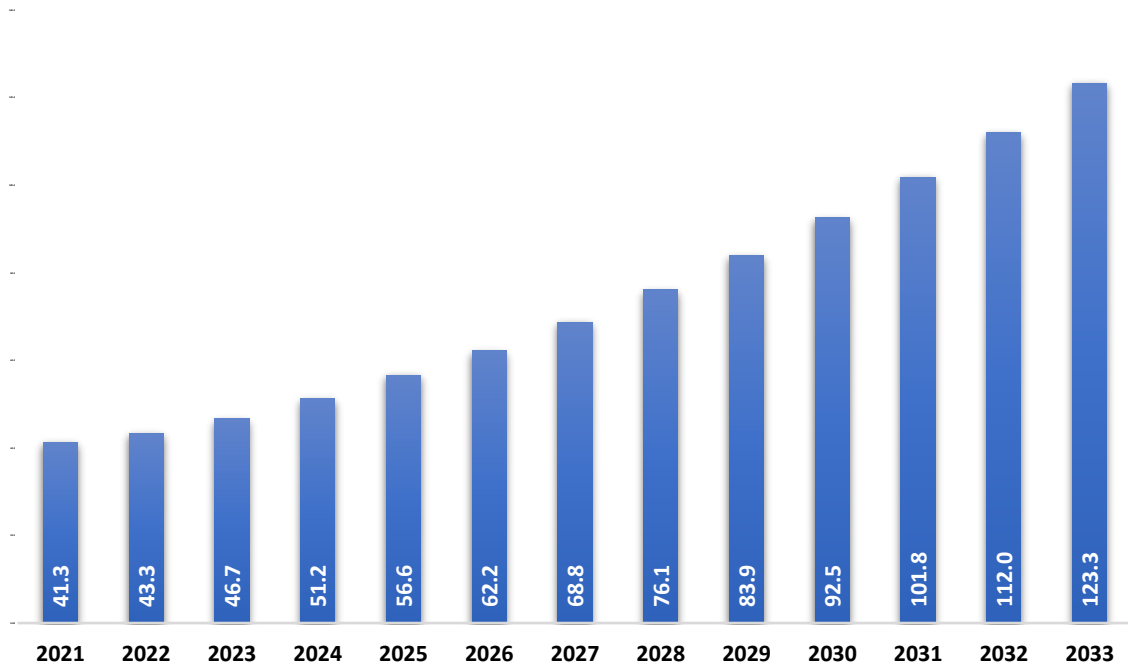


Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

6.11 Others

The Others segment was valued at 56.6 USD million in 2025 and accounted for 1.99% of Precision Medicine and Genomics Ecosystem Market in 2025. It is forecast to grow at a CAGR of 10.3% during 2026-2033 and it will be 123.3 USD million in 2033.

FIGURE 54 OTHERS PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION



Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

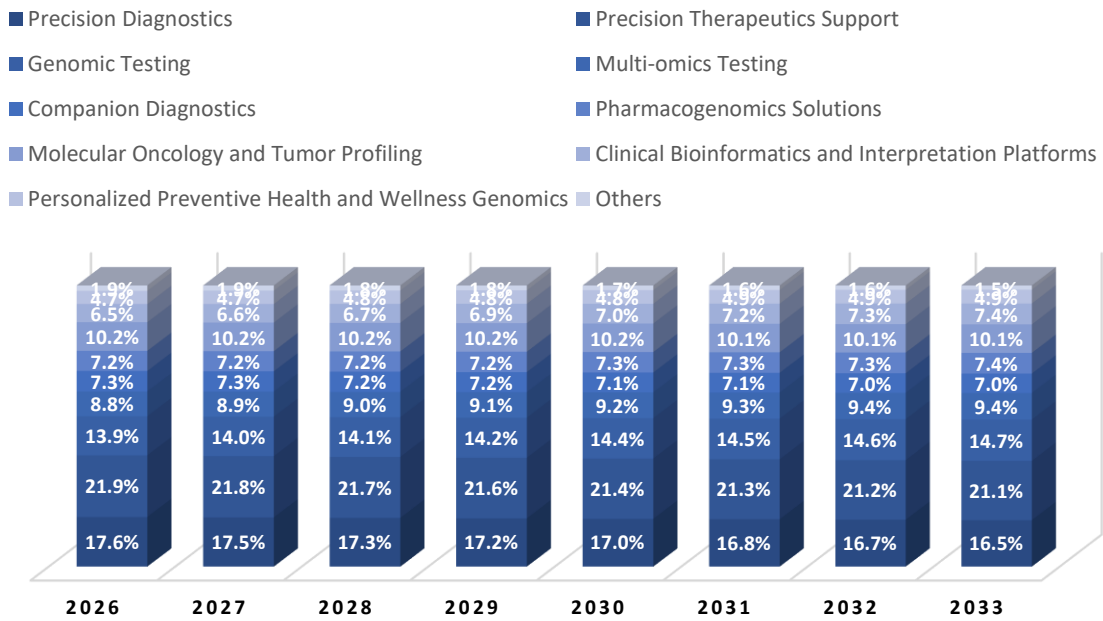
6.12 India Precision Medicine and Genomics Ecosystem Market Forecast by Type (2026-2033)

TABLE 41 INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET REVENUE FORECAST BY TYPE (2026-2033)

| Type | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | 2032 | 2033 | CAGR% (26-33) |
|--|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| Precision Diagnostics | 568.1 | 642.3 | 727.7 | 822 | 930.2 | 1050.8 | 1189.5 | 1347.8 | 13.1% |
| Precision Therapeutics Support | 706.3 | 801.5 | 911.4 | 1033.4 | 1173.9 | 1331.1 | 1512.7 | 1720.9 | 13.6% |
| Genomic Testing | 448.2 | 515.4 | 594 | 682.5 | 785.7 | 902.8 | 1039.6 | 1198.4 | 15.1% |
| Multi-omics Testing | 283.9 | 327.2 | 377.9 | 435.2 | 502.1 | 578.1 | 667.2 | 770.7 | 15.3% |
| Companion Diagnostics | 235.2 | 266.5 | 302.7 | 342.7 | 388.7 | 440.2 | 499.5 | 567.4 | 13.4% |
| Pharmacogenomics Solutions | 230.4 | 264 | 303.1 | 347 | 398 | 455.8 | 523 | 600.9 | 14.7% |
| Molecular Oncology and Tumor Profiling | 328.3 | 374.3 | 427.5 | 487 | 555.7 | 633.1 | 722.8 | 826.2 | 14.1% |
| Clinical Bioinformatics and Interpretation Platforms | 208.2 | 242.7 | 283.3 | 329.8 | 384.4 | 447 | 520.9 | 607.4 | 16.5% |
| Personalized Preventive Health and Wellness Genomics | 151.4 | 173.9 | 200.1 | 229.6 | 263.9 | 302.8 | 348.2 | 400.8 | 14.9% |
| Others | 62.2 | 68.8 | 76.1 | 83.9 | 92.5 | 101.8 | 112 | 123.3 | 10.3% |
| Total | 3222.2 | 3676.5 | 4203.7 | 4793.1 | 5475.2 | 6243.3 | 7135.5 | 8163.7 | 14.2% |

Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

FIGURE 55 INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET SHARE FORECAST BY TYPE (2026-2033)



Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

7 India Precision Medicine and Genomics Ecosystem Market Segment by Application

7.1 India Precision Medicine and Genomics Ecosystem Market Share by Application (2021-2025)

Oncology segment was the highest contributor to the India Precision Medicine and Genomics Ecosystem market with USD 631 million in 2025, and is estimated to reach USD 1739.7 million by 2033, registering a CAGR of 13.6% during the forecast period. The Cardiology segment is estimated to reach USD 1047.4 million by 2033 at a CAGR of 13.8%. Oncology and Cardiology segments collectively accounted for about 35.4% of the India Precision Medicine and Genomics Ecosystem market in 2025, with the former constituting around 22.2% share.

Infectious Disease Genomics segment is expected to grow at the fastest CAGR of 15.1% during the forecast period of 2026-2033. Infectious Disease Genomics segment is followed by Drug Response and Therapy Optimization with a CAGR of 15.1%. Infectious Disease Genomics segment is expected to garner USD 822.1 million by 2033, while Drug Response and Therapy Optimization is expected to reach a value of 627 by end of 2033.

TABLE 42 INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET REVENUE BY APPLICATION (2021-2025)

| Application | 2021 | 2022 | 2023 | 2024 | 2025 |
|--|---------------|---------------|---------------|---------------|---------------|
| Oncology | 418.9 | 449.8 | 495.8 | 556.9 | 631 |
| Rare and Inherited Diseases | 225.8 | 245.7 | 274.4 | 312.1 | 358.3 |
| Cardiology | 248.6 | 267.3 | 294.9 | 331.6 | 376.2 |
| Neurology | 148.1 | 160 | 177.4 | 200.5 | 228.6 |
| Reproductive and Prenatal Health | 199.2 | 216.1 | 240.7 | 273.2 | 312.8 |
| Infectious Disease Genomics | 168.6 | 183.6 | 205.1 | 233.5 | 268.2 |
| Metabolic Disorders | 120.9 | 129 | 141.4 | 157.8 | 177.7 |
| Immunology and Autoimmune Disorders | 118.5 | 128 | 142 | 160.6 | 183.1 |
| Drug Response and Therapy Optimization | 128.8 | 140.2 | 156.6 | 178.3 | 204.7 |
| Others | 73.7 | 77.7 | 84.1 | 92.6 | 102.9 |
| Total | 1851.2 | 1997.4 | 2212.6 | 2497.1 | 2843.7 |

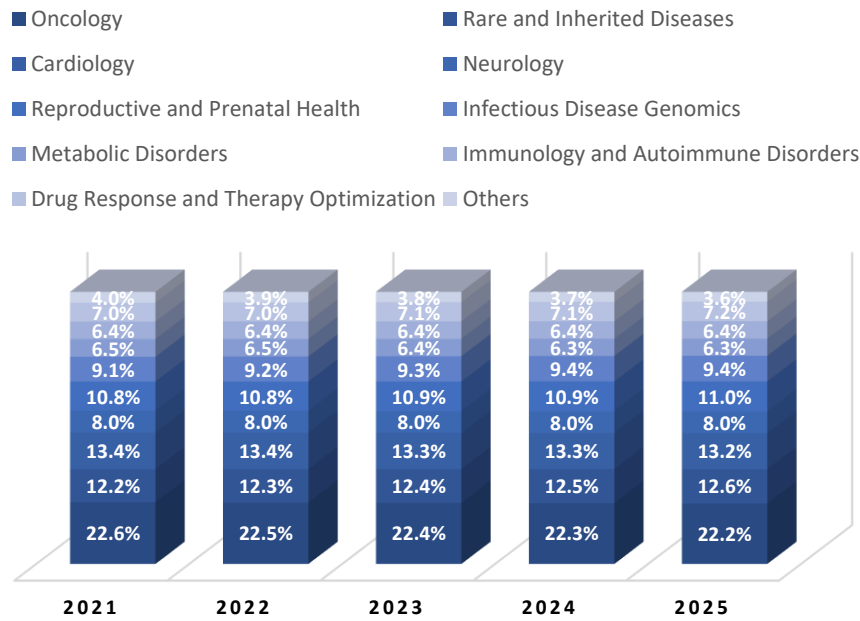
Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

TABLE 43 INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET REVENUE SHARE BY APPLICATION (2021-2025)

| Application | 2021 | 2022 | 2023 | 2024 | 2025 |
|--|----------------|----------------|----------------|----------------|----------------|
| Oncology | 22.6% | 22.5% | 22.4% | 22.3% | 22.2% |
| Rare and Inherited Diseases | 12.2% | 12.3% | 12.4% | 12.5% | 12.6% |
| Cardiology | 13.4% | 13.4% | 13.3% | 13.3% | 13.2% |
| Neurology | 8% | 8.01% | 8.02% | 8.03% | 8.04% |
| Reproductive and Prenatal Health | 10.8% | 10.8% | 10.9% | 10.9% | 11% |
| Infectious Disease Genomics | 9.11% | 9.19% | 9.27% | 9.35% | 9.43% |
| Metabolic Disorders | 6.53% | 6.46% | 6.39% | 6.32% | 6.25% |
| Immunology and Autoimmune Disorders | 6.4% | 6.41% | 6.42% | 6.43% | 6.44% |
| Drug Response and Therapy Optimization | 6.96% | 7.02% | 7.08% | 7.14% | 7.2% |
| Others | 3.98% | 3.89% | 3.8% | 3.71% | 3.62% |
| Total | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% |

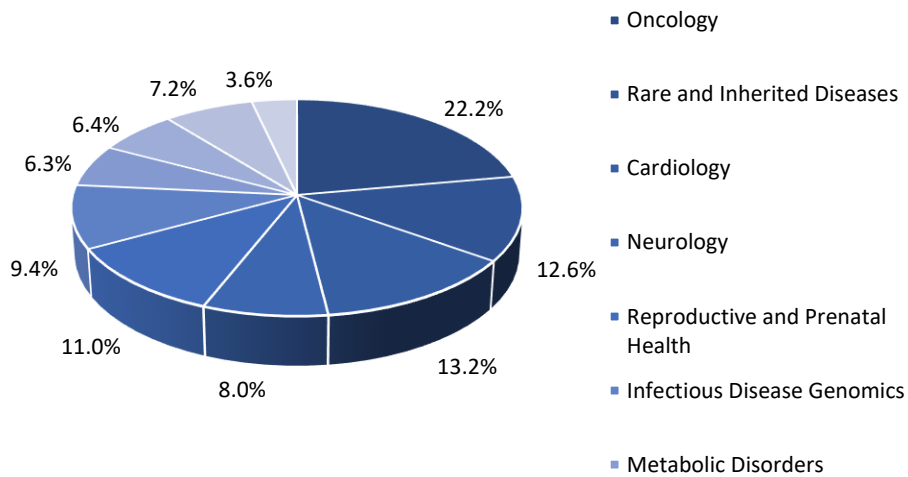
Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

FIGURE 56 INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM REVENUE MARKET SHARE BY APPLICATION (2021-2025)



Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

FIGURE 57 INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM REVENUE SHARE BY APPLICATION IN 2025

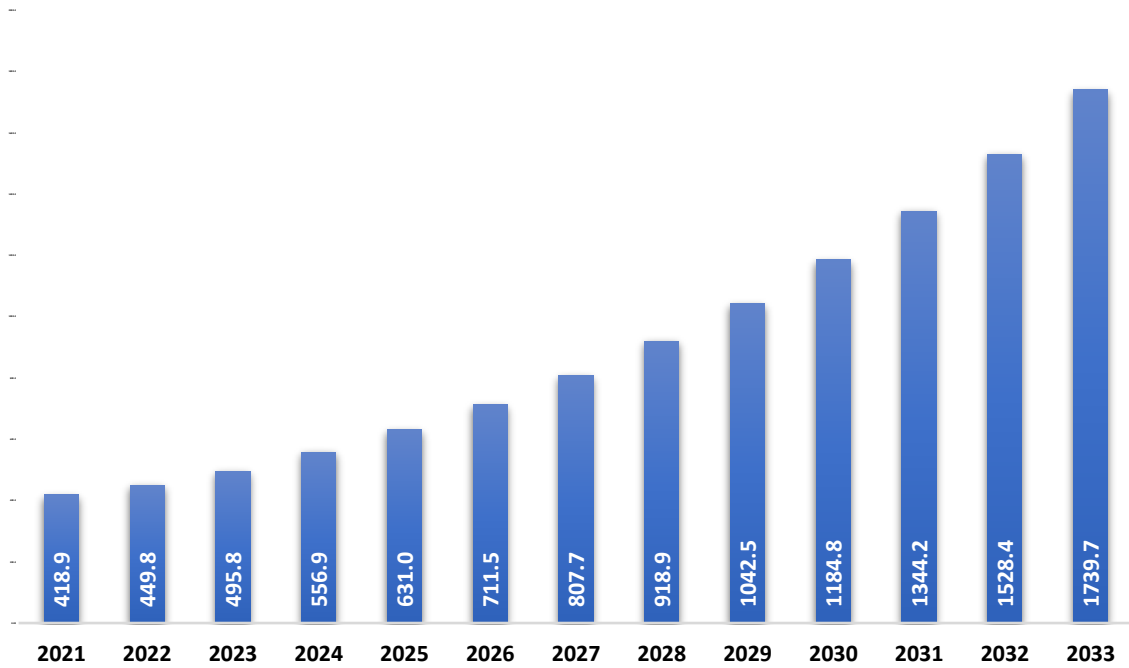


Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

7.2 Oncology

The Oncology segment was valued at 631 USD million in 2025 and accounted for 22.2% of Precision Medicine and Genomics Ecosystem Market in 2025. It is forecast to grow at a CAGR of 13.6% during 2026-2033 and it will be 1739.7 USD million in 2033.

FIGURE 58 ONCOLOGY PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION

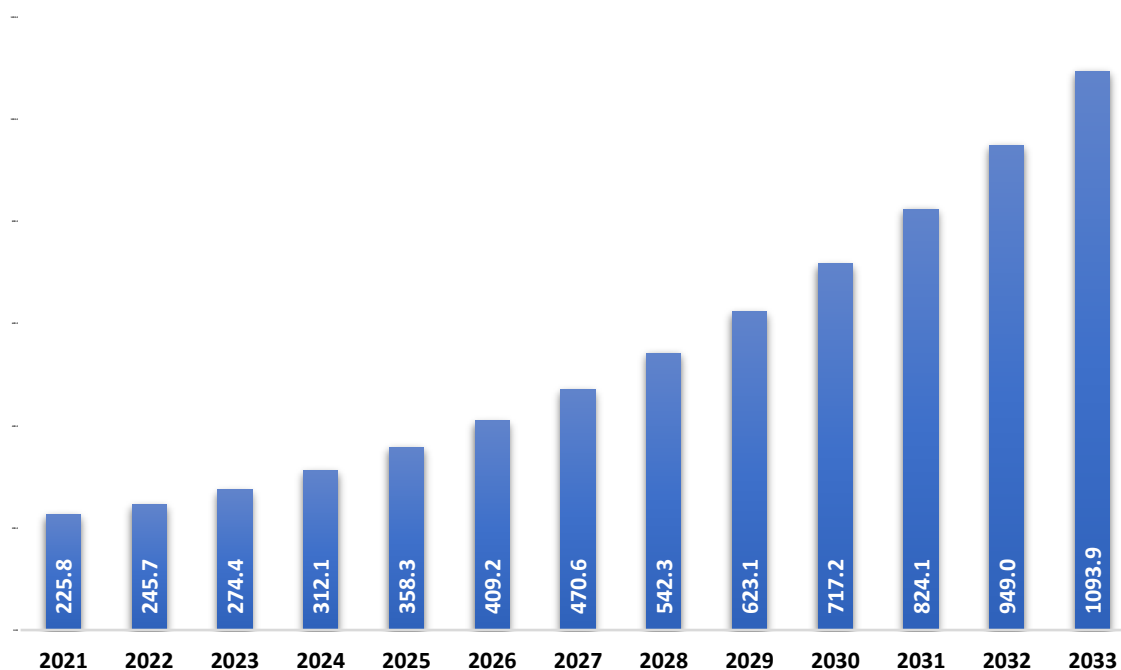


Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

7.3 Rare and Inherited Diseases

The Rare and Inherited Diseases segment was valued at 358.3 USD million in 2025 and accounted for 12.6% of Precision Medicine and Genomics Ecosystem Market in 2025. It is forecast to grow at a CAGR of 15.1% during 2026-2033 and it will be 1093.9 USD million in 2033.

FIGURE 59 RARE AND INHERITED DISEASES PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION

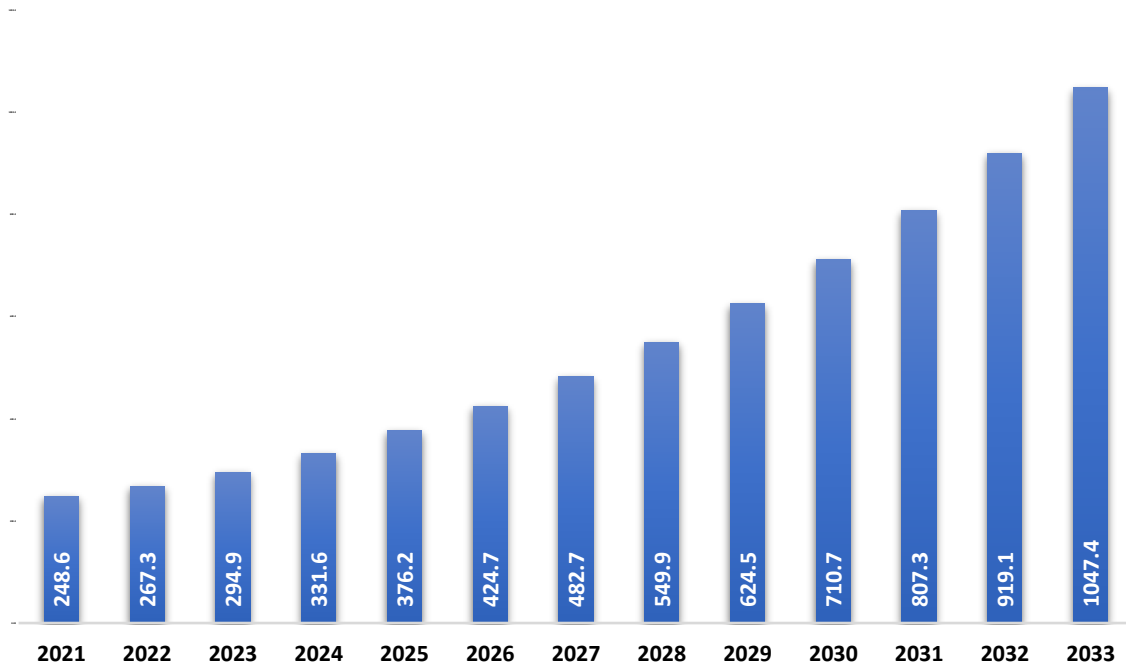


Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

7.4 Cardiology

The Cardiology segment was valued at 376.2 USD million in 2025 and accounted for 13.2% of Precision Medicine and Genomics Ecosystem Market in 2025. It is forecast to grow at a CAGR of 13.8% during 2026-2033 and it will be 1047.4 USD million in 2033.

FIGURE 60 CARDIOLOGY PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION

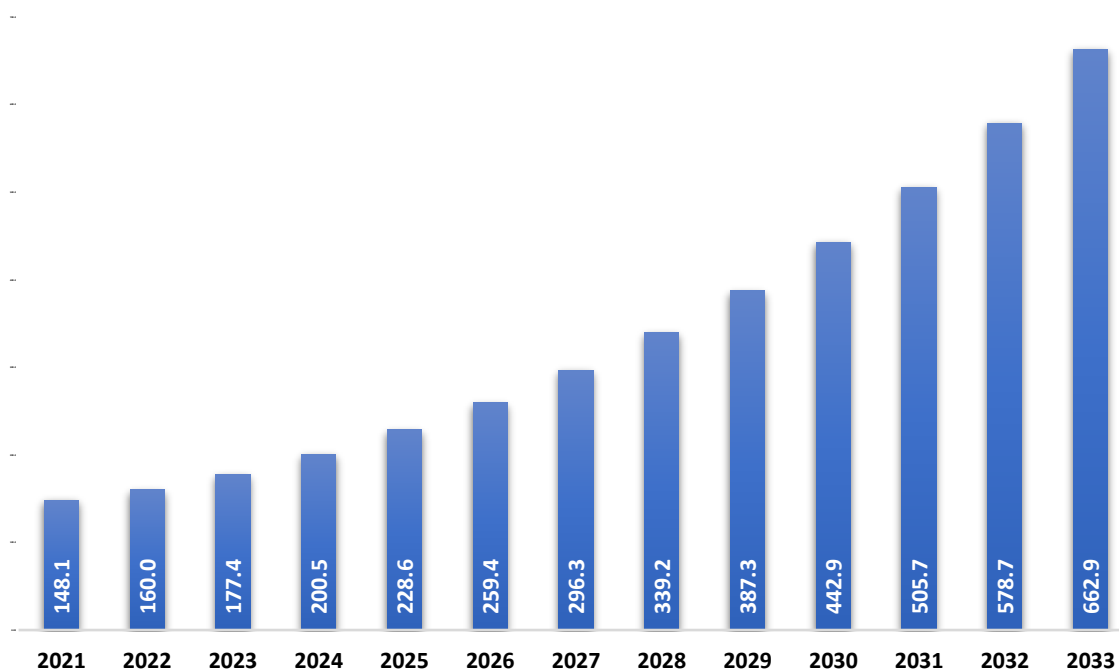


Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

7.5 Neurology

The Neurology segment was valued at 228.6 USD million in 2025 and accounted for 8.04% of Precision Medicine and Genomics Ecosystem Market in 2025. It is forecast to grow at a CAGR of 14.3% during 2026-2033 and it will be 662.9 USD million in 2033.

FIGURE 61 NEUROLOGY PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION

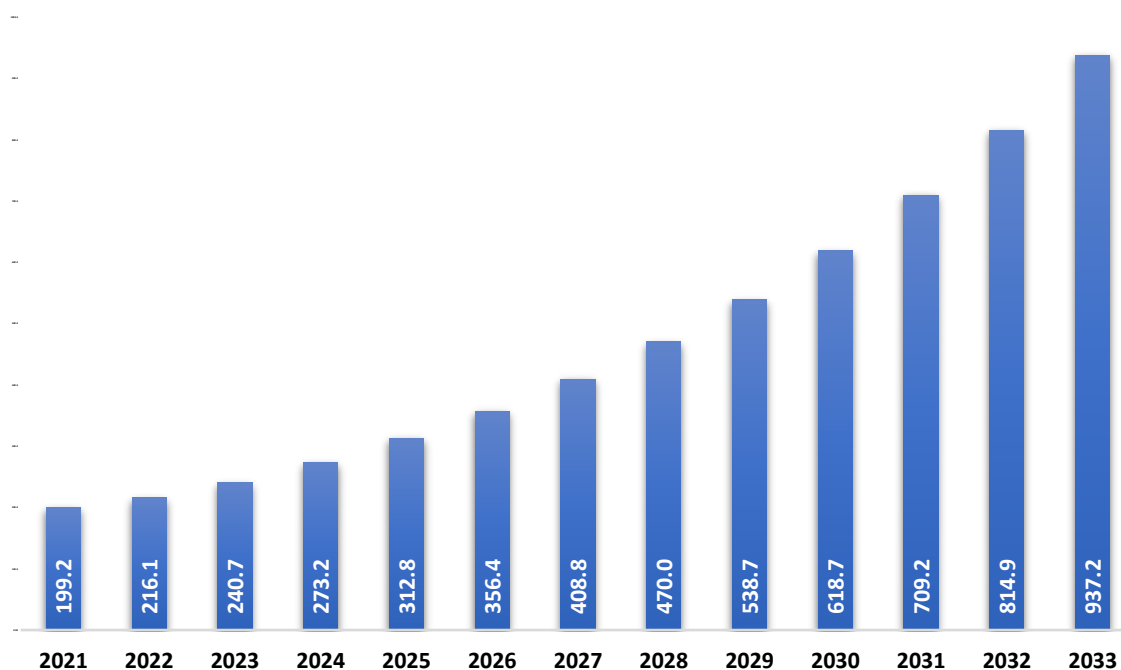


Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

7.6 Reproductive and Prenatal Health

The Reproductive and Prenatal Health segment was valued at 312.8 USD million in 2025 and accounted for 11% of Precision Medicine and Genomics Ecosystem Market in 2025. It is forecast to grow at a CAGR of 14.8% during 2026-2033 and it will be 937.2 USD million in 2033.

FIGURE 62 REPRODUCTIVE AND PRENATAL HEALTH PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION

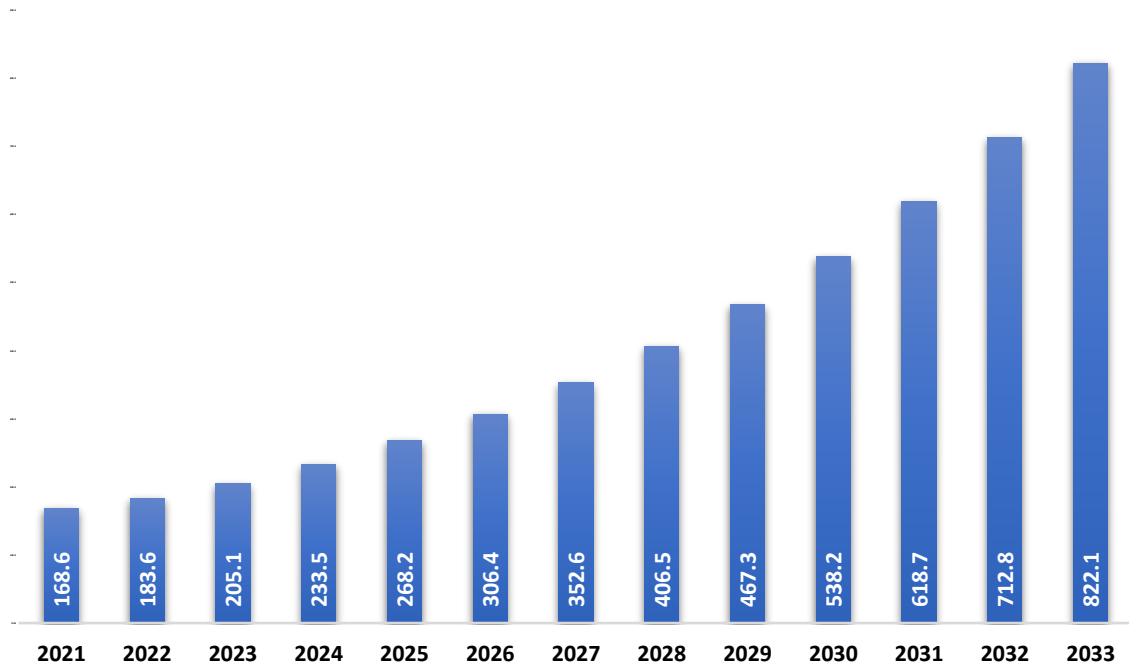


Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

7.7 Infectious Disease Genomics

The Infectious Disease Genomics segment was valued at 268.2 USD million in 2025 and accounted for 9.43% of Precision Medicine and Genomics Ecosystem Market in 2025. It is forecast to grow at a CAGR of 15.1% during 2026-2033 and it will be 822.1 USD million in 2033.

FIGURE 63 INFECTIOUS DISEASE GENOMICS PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION

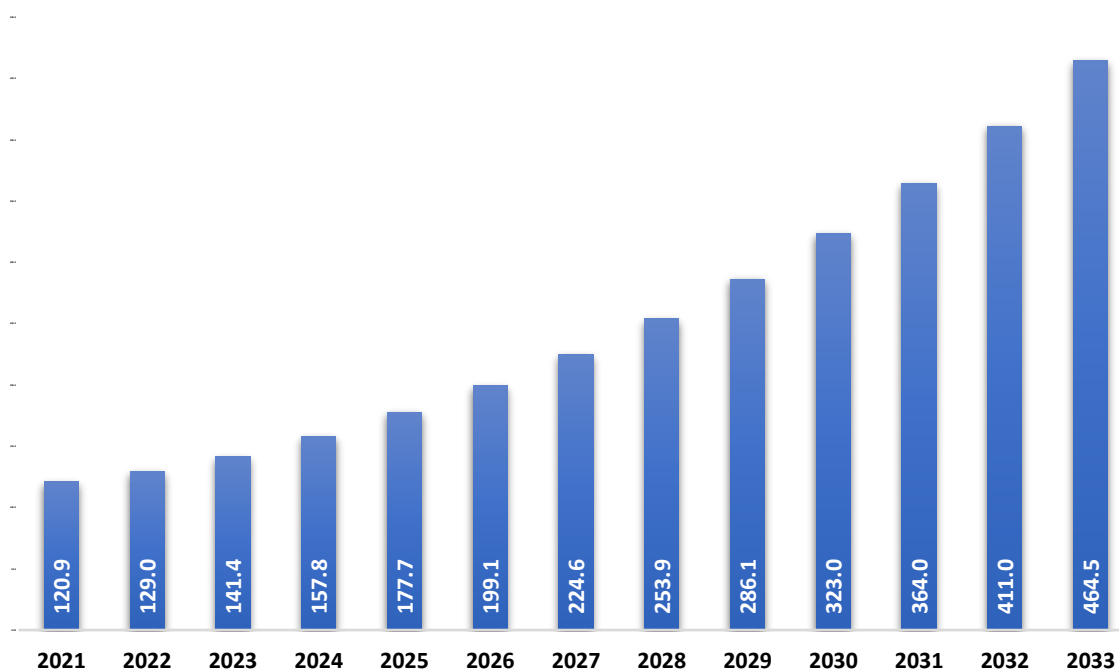


Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

7.8 Metabolic Disorders

The Metabolic Disorders segment was valued at 177.7 USD million in 2025 and accounted for 6.25% of Precision Medicine and Genomics Ecosystem Market in 2025. It is forecast to grow at a CAGR of 12.9% during 2026-2033 and it will be 464.5 USD million in 2033.

FIGURE 64 METABOLIC DISORDERS PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION

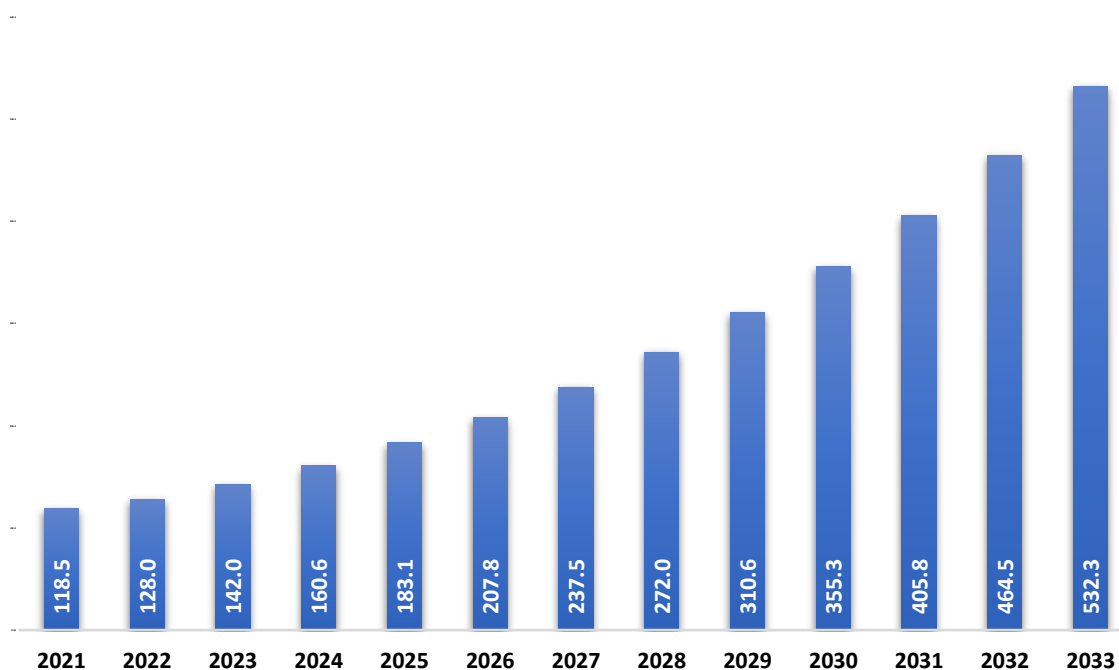


Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

7.9 Immunology and Autoimmune Disorders

The Immunology and Autoimmune Disorders segment was valued at 183.1 USD million in 2025 and accounted for 6.44% of Precision Medicine and Genomics Ecosystem Market in 2025. It is forecast to grow at a CAGR of 14.4% during 2026-2033 and it will be 532.3 USD million in 2033.

FIGURE 65 IMMUNOLOGY AND AUTOIMMUNE DISORDERS PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION

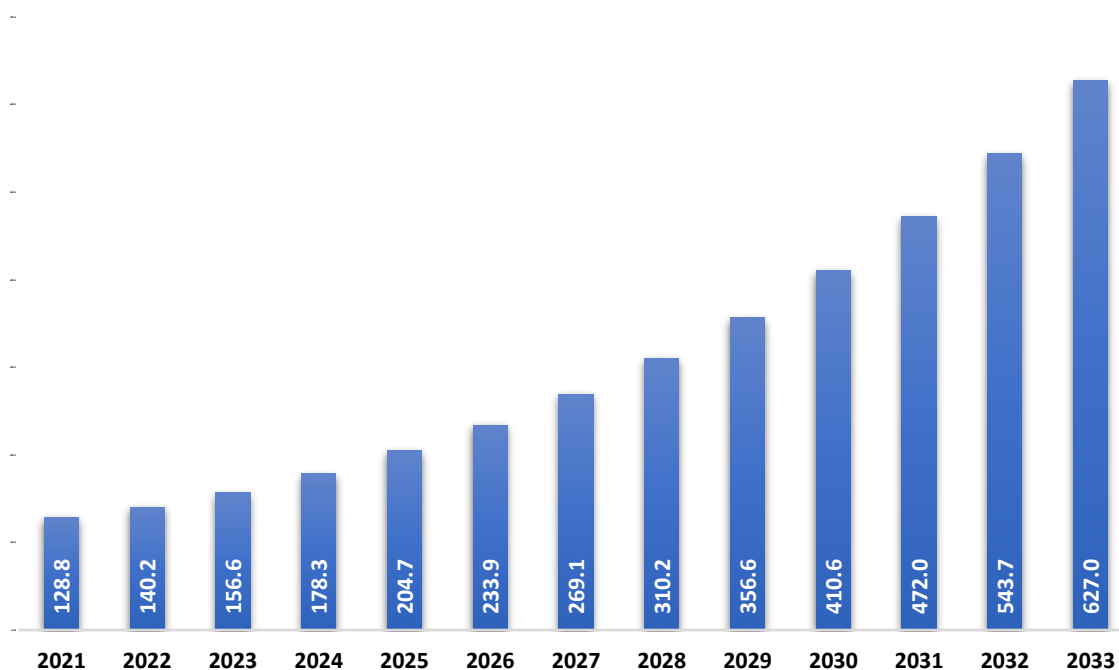


Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

7.10 Drug Response and Therapy Optimization

The Drug Response and Therapy Optimization segment was valued at 204.7 USD million in 2025 and accounted for 7.2% of Precision Medicine and Genomics Ecosystem Market in 2025. It is forecast to grow at a CAGR of 15.1% during 2026-2033 and it will be 627 USD million in 2033.

FIGURE 66 DRUG RESPONSE AND THERAPY OPTIMIZATION PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION

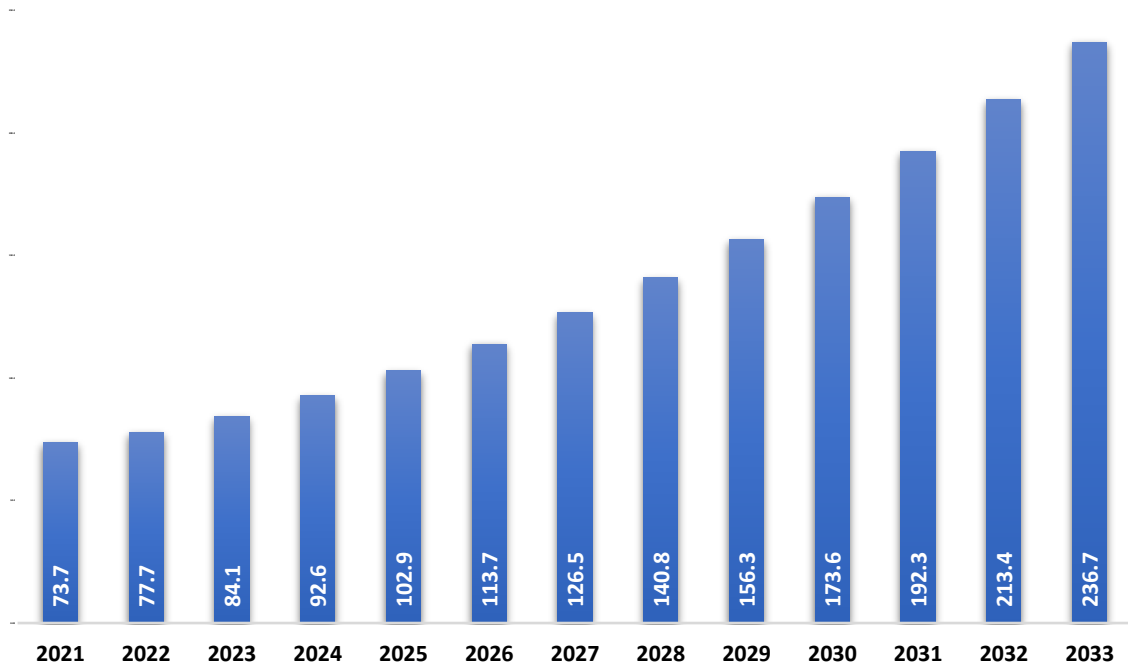


Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

7.11 Others

The Others segment was valued at 102.9 USD million in 2025 and accounted for 3.62% of Precision Medicine and Genomics Ecosystem Market in 2025. It is forecast to grow at a CAGR of 11% during 2026-2033 and it will be 236.7 USD million in 2033.

FIGURE 67 OTHERS PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION



Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

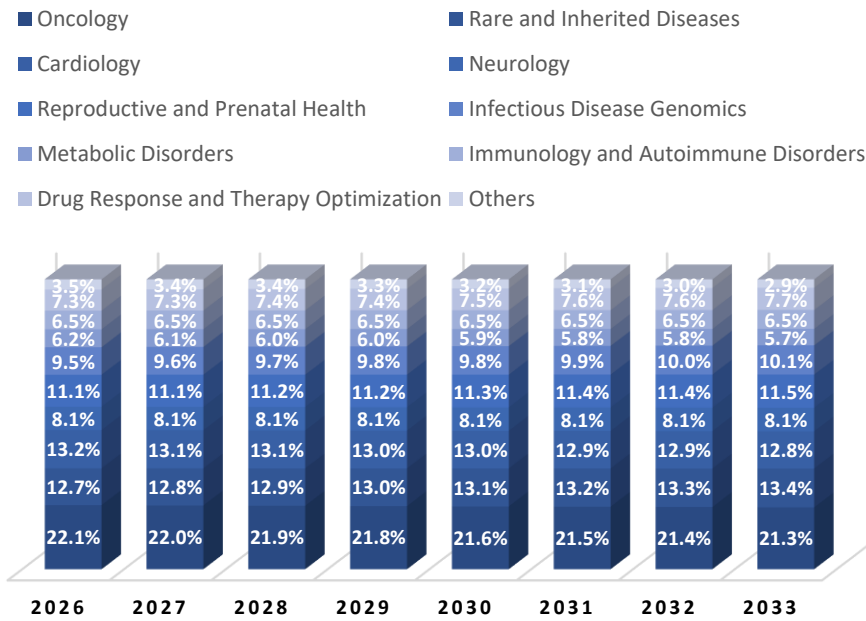
7.12 Precision Medicine and Genomics Ecosystem Market Forecast by Application (2026-2033)

TABLE 44 INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM REVENUE FORECAST BY APPLICATION (2026-2033)

| Application | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | 2032 | 2033 | CAGR% (26-33) |
|--|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| Oncology | 711.5 | 807.7 | 918.9 | 1042.5 | 1184.8 | 1344.2 | 1528.4 | 1739.7 | 13.6% |
| Rare and Inherited Diseases | 409.2 | 470.6 | 542.3 | 623.1 | 717.2 | 824.1 | 949 | 1093.9 | 15.1% |
| Cardiology | 424.7 | 482.7 | 549.9 | 624.5 | 710.7 | 807.3 | 919.1 | 1047.4 | 13.8% |
| Neurology | 259.4 | 296.3 | 339.2 | 387.3 | 442.9 | 505.7 | 578.7 | 662.9 | 14.3% |
| Reproductive and Prenatal Health | 356.4 | 408.8 | 470 | 538.7 | 618.7 | 709.2 | 814.9 | 937.2 | 14.8% |
| Infectious Disease Genomics | 306.4 | 352.6 | 406.5 | 467.3 | 538.2 | 618.7 | 712.8 | 822.1 | 15.1% |
| Metabolic Disorders | 199.1 | 224.6 | 253.9 | 286.1 | 323 | 364 | 411 | 464.5 | 12.9% |
| Immunology and Autoimmune Disorders | 207.8 | 237.5 | 272 | 310.6 | 355.3 | 405.8 | 464.5 | 532.3 | 14.4% |
| Drug Response and Therapy Optimization | 233.9 | 269.1 | 310.2 | 356.6 | 410.6 | 472 | 543.7 | 627 | 15.1% |
| Others | 113.7 | 126.5 | 140.8 | 156.3 | 173.6 | 192.3 | 213.4 | 236.7 | 11% |
| Total | 3222.2 | 3676.5 | 4203.7 | 4793.1 | 5475.2 | 6243.3 | 7135.5 | 8163.7 | 14.2% |

Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

FIGURE 68 INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET SHARE FORECAST BY APPLICATION (2026-2033)



Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

8 India Precision Medicine and Genomics Ecosystem Market Segment by Region

8.1 India Precision Medicine and Genomics Ecosystem Market Share by Region (2021-2025)

South India segment was the highest contributor to the India Precision Medicine and Genomics Ecosystem market with USD 891.5 million in 2025, and is estimated to reach USD 2598.5 million by 2033, registering a CAGR of 14.4% during the forecast period. The West India segment is estimated to reach USD 2549.5 million by 2033 at a CAGR of 15.1%. South India and West India segments collectively accounted for about 60.6% of the India Precision Medicine and Genomics Ecosystem market in 2025, with the former constituting around 31.4% share.

West India segment is expected to grow at the fastest CAGR of 15.1% during the forecast period of 2026-2033. West India segment is followed by South India with a CAGR of 14.4%. West India segment is expected to garner USD 2549.5 million by 2033, while South India is expected to reach a value of 2598.5 by end of 2033.

TABLE 45 INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET REVENUE BY REGION (2021-2025)

| Region | 2021 | 2022 | 2023 | 2024 | 2025 |
|---------------|---------------|---------------|---------------|---------------|---------------|
| North India | 486.3 | 523.9 | 579.5 | 653 | 742.5 |
| South India | 575.9 | 622.6 | 691 | 781.3 | 891.5 |
| West India | 522.6 | 568.9 | 635.7 | 723.7 | 831.2 |
| East India | 150.3 | 159.8 | 174.4 | 193.8 | 217.3 |
| Central India | 116.1 | 122.2 | 132.1 | 145.3 | 161.2 |
| Total | 1851.2 | 1997.4 | 2212.6 | 2497.1 | 2843.7 |

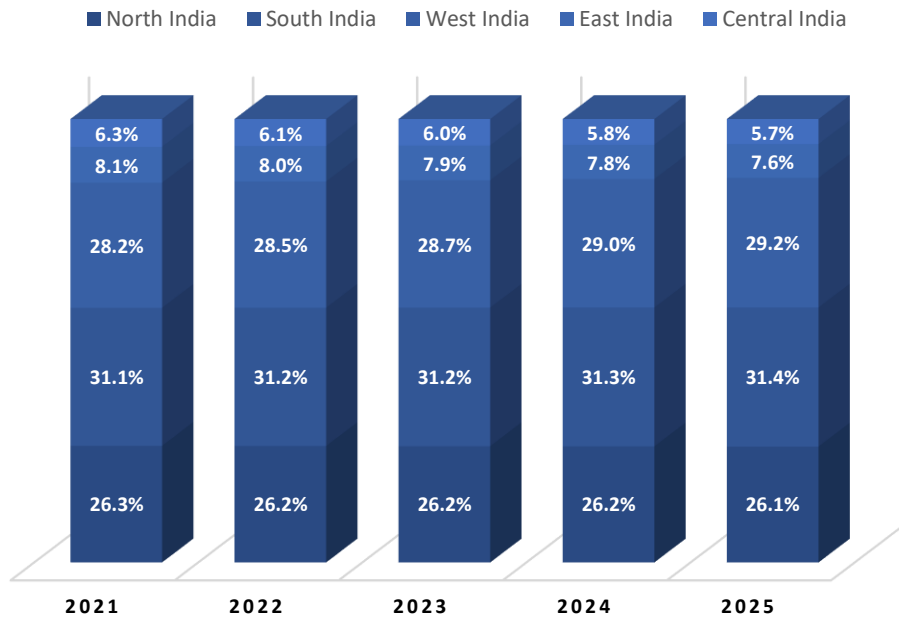
Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

TABLE 46 INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET REVENUE SHARE BY REGION (2021-2025)

| Region | 2021 | 2022 | 2023 | 2024 | 2025 |
|---------------|----------------|----------------|----------------|----------------|----------------|
| North India | 26.3% | 26.2% | 26.2% | 26.2% | 26.1% |
| South India | 31.1% | 31.2% | 31.2% | 31.3% | 31.4% |
| West India | 28.2% | 28.5% | 28.7% | 29% | 29.2% |
| East India | 8.12% | 8% | 7.88% | 7.76% | 7.64% |
| Central India | 6.27% | 6.12% | 5.97% | 5.82% | 5.67% |
| Total | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% |

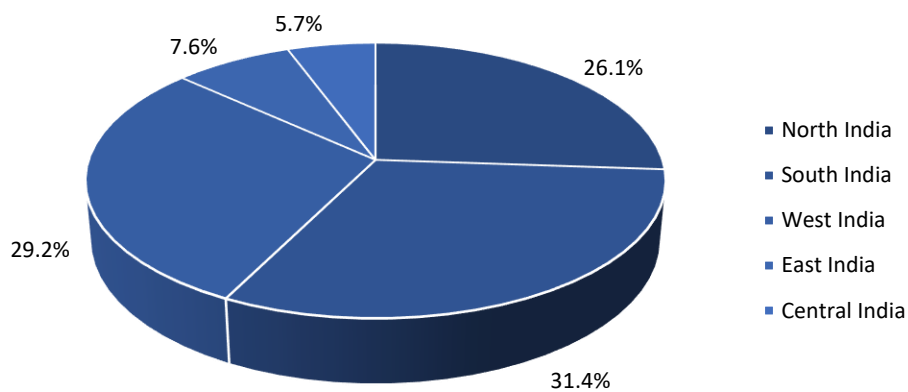
Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

FIGURE 69 INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM REVENUE MARKET SHARE BY REGION (2021-2025)



Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

FIGURE 70 INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM REVENUE SHARE BY REGION IN 2025

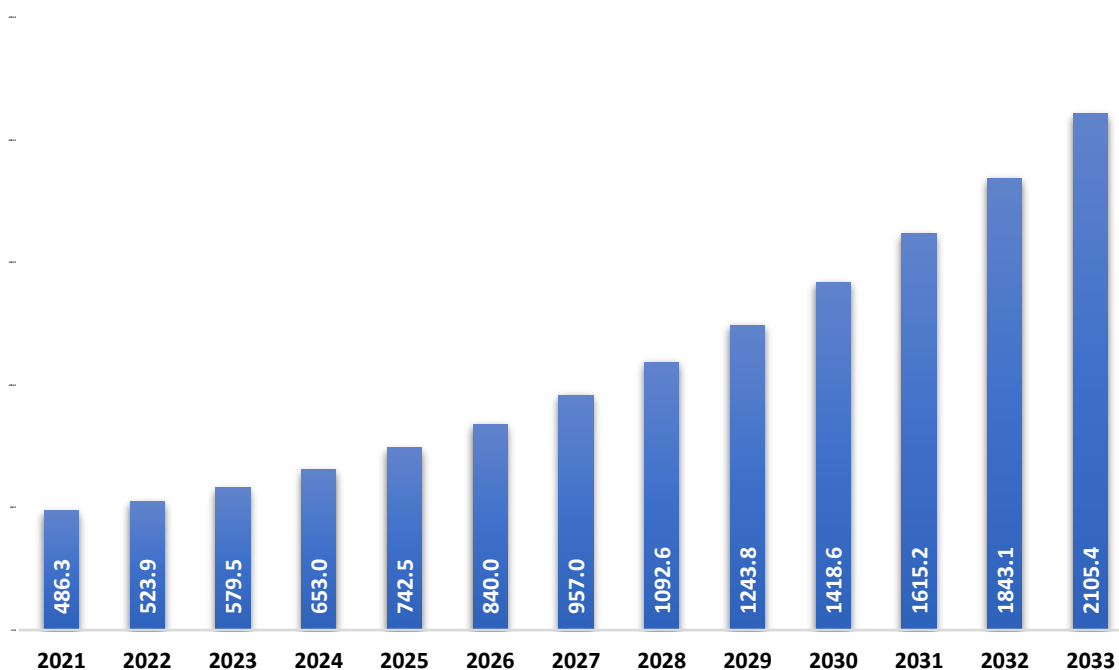


Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

8.2 North India

The North India segment was valued at 742.5 USD million in 2025 and accounted for 26.1% of Precision Medicine and Genomics Ecosystem Market in 2025. It is forecast to grow at a CAGR of 14% during 2026-2033 and it will be 2105.4 USD million in 2033.

FIGURE 71 NORTH INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION

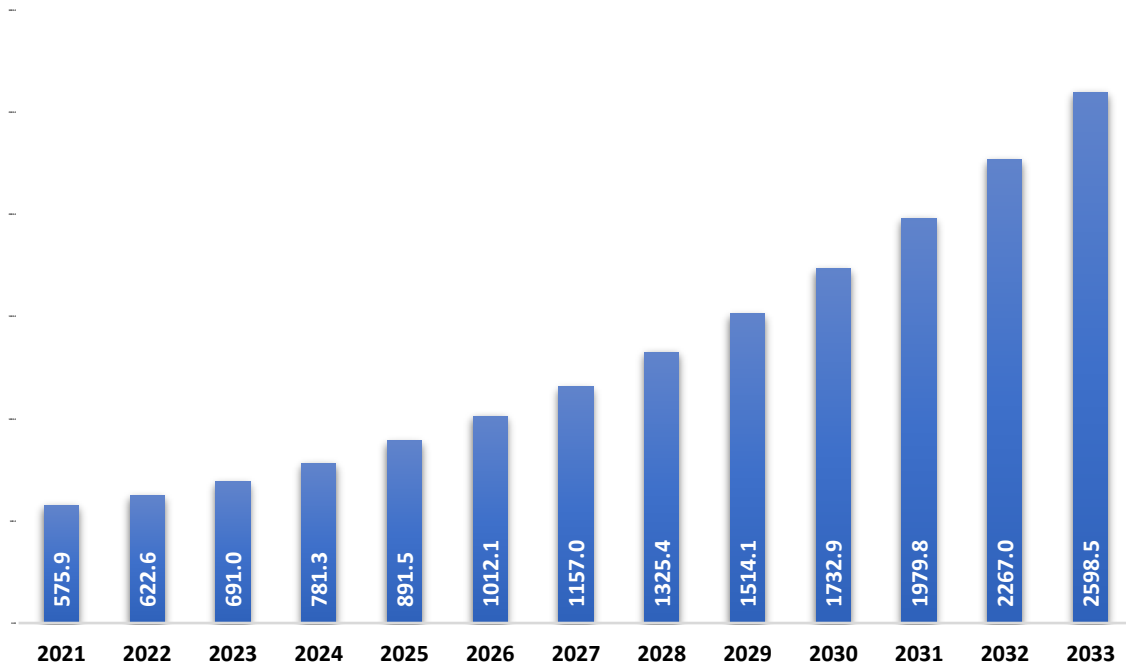


Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

8.3 South India

The South India segment was valued at 891.5 USD million in 2025 and accounted for 31.4% of Precision Medicine and Genomics Ecosystem Market in 2025. It is forecast to grow at a CAGR of 14.4% during 2026-2033 and it will be 2598.5 USD million in 2033.

FIGURE 72 SOUTH INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION

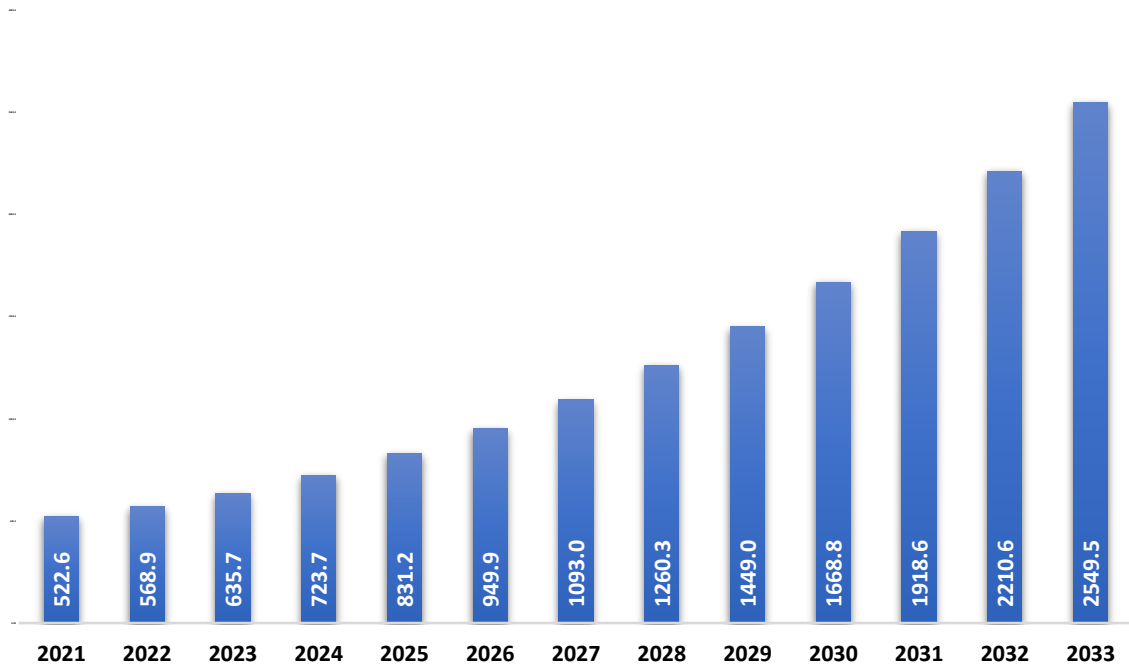


Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

8.4 West India

The West India segment was valued at 831.2 USD million in 2025 and accounted for 29.2% of Precision Medicine and Genomics Ecosystem Market in 2025. It is forecast to grow at a CAGR of 15.1% during 2026-2033 and it will be 2549.5 USD million in 2033.

FIGURE 73 WEST INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION

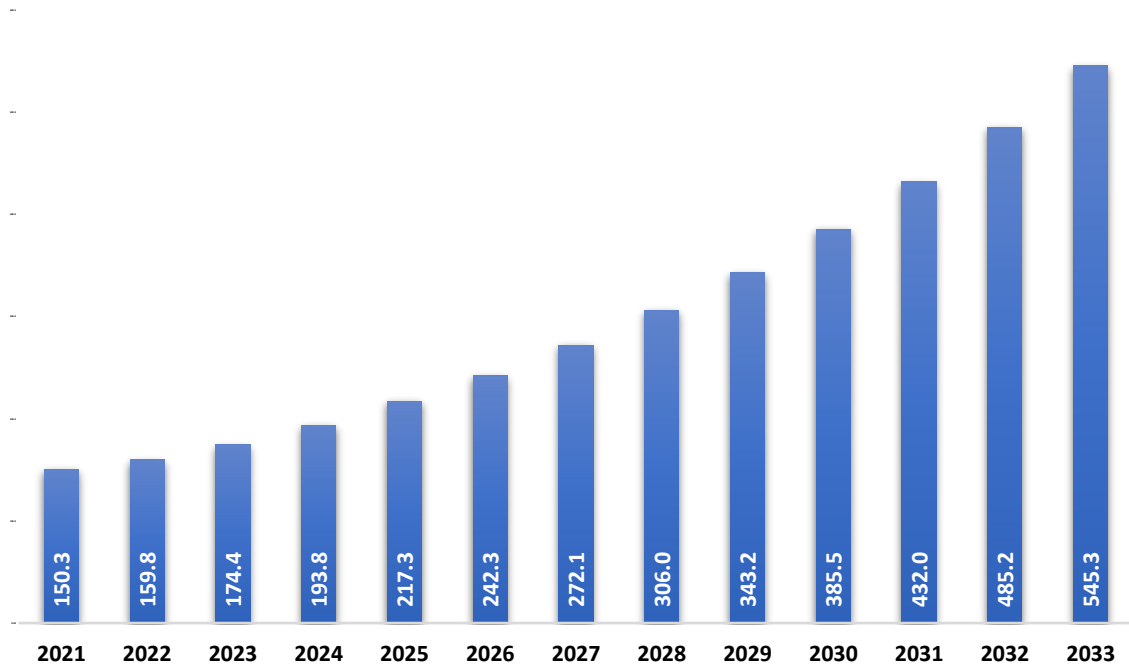


Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

8.5 East India

The East India segment was valued at 217.3 USD million in 2025 and accounted for 7.64% of Precision Medicine and Genomics Ecosystem Market in 2025. It is forecast to grow at a CAGR of 12.3% during 2026-2033 and it will be 545.3 USD million in 2033.

FIGURE 74 EAST INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION

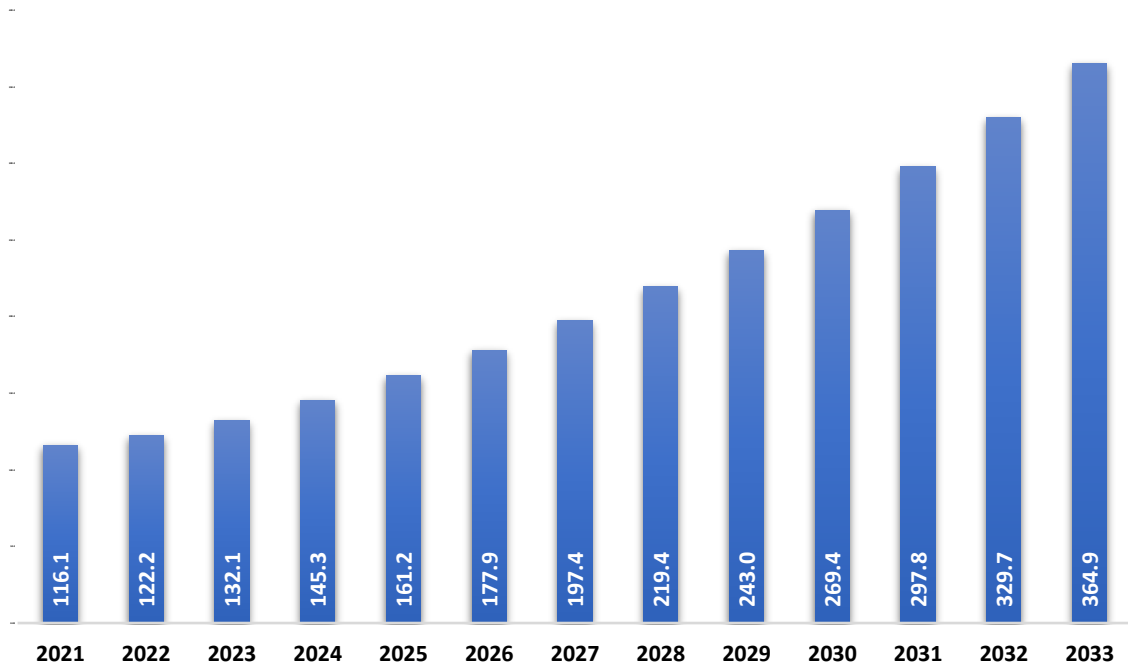


Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

8.6 Central India

The Central India segment was valued at 161.2 USD million in 2025 and accounted for 5.67% of Precision Medicine and Genomics Ecosystem Market in 2025. It is forecast to grow at a CAGR of 10.8% during 2026-2033 and it will be 364.9 USD million in 2033.

FIGURE 75 CENTRAL INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET (2021-2033), USD MILLION



Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

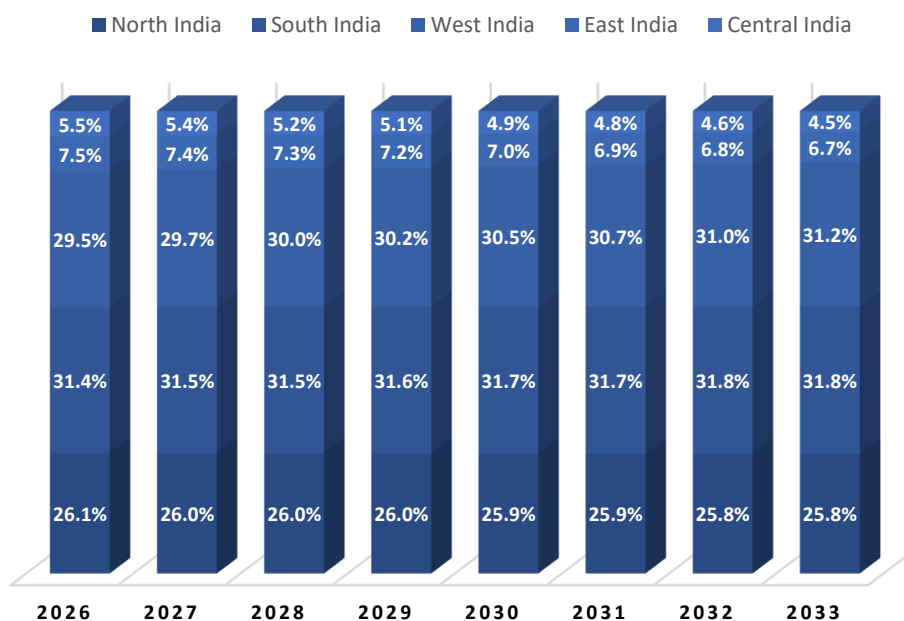
8.7 Precision Medicine and Genomics Ecosystem Market Forecast by Region (2026-2033)

TABLE 47 INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM REVENUE FORECAST BY REGION (2026-2033)

| Region | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | 2032 | 2033 | CAGR% (2026-2033) |
|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|-------------------|
| North India | 840 | 957 | 1092.6 | 1243.8 | 1418.6 | 1615.2 | 1843.1 | 2105.4 | 14% |
| South India | 1012.1 | 1157 | 1325.4 | 1514.1 | 1732.9 | 1979.8 | 2267 | 2598.5 | 14.4% |
| West India | 949.9 | 1093 | 1260.3 | 1449 | 1668.8 | 1918.6 | 2210.6 | 2549.5 | 15.1% |
| East India | 242.3 | 272.1 | 306 | 343.2 | 385.5 | 432 | 485.2 | 545.3 | 12.3% |
| Central India | 177.9 | 197.4 | 219.4 | 243 | 269.4 | 297.8 | 329.7 | 364.9 | 10.8% |
| Total | 3222.2 | 3676.5 | 4203.7 | 4793.1 | 5475.2 | 6243.3 | 7135.5 | 8163.7 | 14.2% |

Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

FIGURE 76 INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET SHARE FORECAST BY REGION (2026-2033)



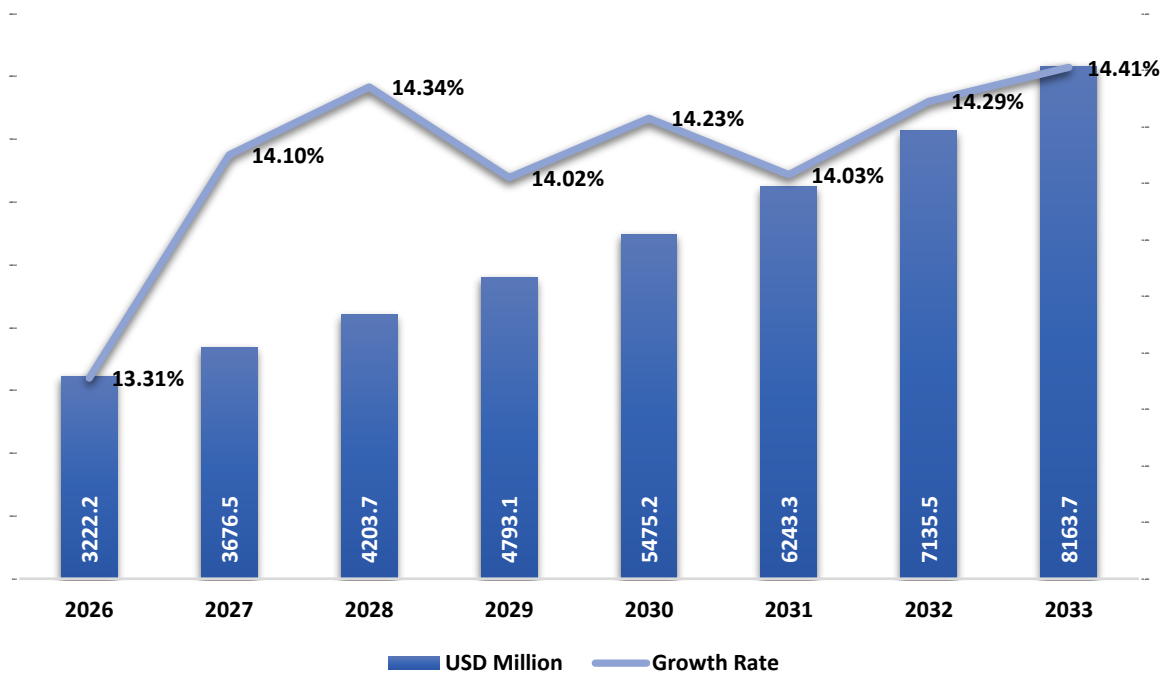
Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

9 India Precision Medicine and Genomics Ecosystem Market Size Forecast (2026-2033)

9.1 India Precision Medicine and Genomics Ecosystem Market Size Forecast (2026-2033)

The Precision Medicine and Genomics Ecosystem market was valued at 2843.7 million USD in 2025 and is projected to reach 8163.7 million USD by 2033, at a CAGR of 14.2% during the forecast period.

FIGURE 77 INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET REVENUE (MILLION USD) AND GROWTH RATE FORECAST (2026-2033)



Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

9.1.1 India Precision Medicine and Genomics Ecosystem Market Revenue Forecast by Type (2026-2033)

TABLE 48 INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET REVENUE (MILLION USD) FORECAST BY TYPE (2026-2033)

| Type | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | 2032 | 2033 | CAGR% (26-33) |
|--|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| Precision Diagnostics | 568.1 | 642.3 | 727.7 | 822 | 930.2 | 1050.8 | 1189.5 | 1347.8 | 13.1% |
| Precision Therapeutics Support | 706.3 | 801.5 | 911.4 | 1033.4 | 1173.9 | 1331.1 | 1512.7 | 1720.9 | 13.6% |
| Genomic Testing | 448.2 | 515.4 | 594 | 682.5 | 785.7 | 902.8 | 1039.6 | 1198.4 | 15.1% |
| Multi-omics Testing | 283.9 | 327.2 | 377.9 | 435.2 | 502.1 | 578.1 | 667.2 | 770.7 | 15.3% |
| Companion Diagnostics | 235.2 | 266.5 | 302.7 | 342.7 | 388.7 | 440.2 | 499.5 | 567.4 | 13.4% |
| Pharmacogenomics Solutions | 230.4 | 264 | 303.1 | 347 | 398 | 455.8 | 523 | 600.9 | 14.7% |
| Molecular Oncology and Tumor Profiling | 328.3 | 374.3 | 427.5 | 487 | 555.7 | 633.1 | 722.8 | 826.2 | 14.1% |
| Clinical Bioinformatics and Interpretation Platforms | 208.2 | 242.7 | 283.3 | 329.8 | 384.4 | 447 | 520.9 | 607.4 | 16.5% |
| Personalized Preventive Health and Wellness Genomics | 151.4 | 173.9 | 200.1 | 229.6 | 263.9 | 302.8 | 348.2 | 400.8 | 14.9% |
| Others | 62.2 | 68.8 | 76.1 | 83.9 | 92.5 | 101.8 | 112 | 123.3 | 10.3% |
| Total | 3222.2 | 3676.5 | 4203.7 | 4793.1 | 5475.2 | 6243.3 | 7135.5 | 8163.7 | 14.2% |

Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

9.1.2 India Precision Medicine and Genomics Ecosystem Market Revenue Forecast by Application (2026-2033)

TABLE 49 INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET REVENUE (MILLION USD) FORECAST BY APPLICATION (2026-2033)

| Application | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | 2032 | 2033 | CAGR% (26-33) |
|--|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| Oncology | 711.5 | 807.7 | 918.9 | 1042.5 | 1184.8 | 1344.2 | 1528.4 | 1739.7 | 13.6% |
| Rare and Inherited Diseases | 409.2 | 470.6 | 542.3 | 623.1 | 717.2 | 824.1 | 949 | 1093.9 | 15.1% |
| Cardiology | 424.7 | 482.7 | 549.9 | 624.5 | 710.7 | 807.3 | 919.1 | 1047.4 | 13.8% |
| Neurology | 259.4 | 296.3 | 339.2 | 387.3 | 442.9 | 505.7 | 578.7 | 662.9 | 14.3% |
| Reproductive and Prenatal Health | 356.4 | 408.8 | 470 | 538.7 | 618.7 | 709.2 | 814.9 | 937.2 | 14.8% |
| Infectious Disease Genomics | 306.4 | 352.6 | 406.5 | 467.3 | 538.2 | 618.7 | 712.8 | 822.1 | 15.1% |
| Metabolic Disorders | 199.1 | 224.6 | 253.9 | 286.1 | 323 | 364 | 411 | 464.5 | 12.9% |
| Immunology and Autoimmune Disorders | 207.8 | 237.5 | 272 | 310.6 | 355.3 | 405.8 | 464.5 | 532.3 | 14.4% |
| Drug Response and Therapy Optimization | 233.9 | 269.1 | 310.2 | 356.6 | 410.6 | 472 | 543.7 | 627 | 15.1% |
| Others | 113.7 | 126.5 | 140.8 | 156.3 | 173.6 | 192.3 | 213.4 | 236.7 | 11% |
| Total | 3222.2 | 3676.5 | 4203.7 | 4793.1 | 5475.2 | 6243.3 | 7135.5 | 8163.7 | 14.2% |

Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

9.1.3 India Precision Medicine and Genomics Ecosystem Market Revenue Forecast by Region (2026-2033)

TABLE 50 INDIA PRECISION MEDICINE AND GENOMICS ECOSYSTEM MARKET REVENUE (MILLION USD) FORECAST BY REGION (2026-2033)

| Region | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | 2032 | 2033 | CAGR% (2026-2033) |
|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|----------------------|
| North India | 840 | 957 | 1092.6 | 1243.8 | 1418.6 | 1615.2 | 1843.1 | 2105.4 | 14% |
| South India | 1012.1 | 1157 | 1325.4 | 1514.1 | 1732.9 | 1979.8 | 2267 | 2598.5 | 14.4% |
| West India | 949.9 | 1093 | 1260.3 | 1449 | 1668.8 | 1918.6 | 2210.6 | 2549.5 | 15.1% |
| East India | 242.3 | 272.1 | 306 | 343.2 | 385.5 | 432 | 485.2 | 545.3 | 12.3% |
| Central India | 177.9 | 197.4 | 219.4 | 243 | 269.4 | 297.8 | 329.7 | 364.9 | 10.8% |
| Total | 3222.2 | 3676.5 | 4203.7 | 4793.1 | 5475.2 | 6243.3 | 7135.5 | 8163.7 | 14.2% |

Source: Secondary Research, Company Publications, Primary Interviews, and DMR Analysis

10 Appendix

10.1 Methodology

10.2 Primary Research

We at Domestic Market Research employ iterative research methodology along with a combination of secondary and primary research to provide the most accurate market estimates and forecasts. Key research steps include:

- Data mining

This step includes in-depth data mining wherein we procure market data as well as any related information through different verified databases and sources.

- Data analysis

The procured information is then analyzed and mapped to assess the data as well as eliminate any discrepancies observed.

- Market Modeling

All the gathered data points are then studied to devise an appropriate estimation and sizing model in an attempt to deduce viable conclusions. Subject-matter-expert and analyst perspectives, along with heuristic and experience-based market sizing, are an integral part of this stage.

- Validation & publishing

Validation is the most important step in the process. Validation & revalidation via an intricately designed process helps us finalize data points to be used for final calculations.

10.3 Research Methodology

We implemented a combination of primary and secondary research to estimate and size our market. Secondary research was the initial phase involved in our study. This is where we conducted data mining and referred to verified data sources, such as independent studies, government and regulatory published material, technical journals, trade magazines, and paid data sources.

For forecasting, the following parameters were considered:

- Market drivers, challenges and opportunities along with their current and expected impacts
- Technological developments and current status with expected developments
- Products Types and Application trends and dynamics
- Consumer trends
- Unmet need analysis and demand forecasting

Weights were assigned to these parameters and their impact on the market was quantified using a weighted average technique in order to derive expected market growth rate.

All the estimates and forecasts are verified through extensive primary research with experts operating in this market, and include:

- Key market participants
- Manufacturers
- Sales and marketing team

10.4 Assumptions & Exclusions

- The report provides market size with 2025 as the base year in consideration and a yearly forecast till 2033 in terms of Revenue (USD million). The estimates for all segments including Type, and Application have been provided on a regional basis for the forecast period mentioned above
- We have implemented a mix of top-down and bottom-up approach for market sizing, analyzing the key regional markets, dynamics, and trends for various Application. The India market has been estimated by integrating the regional markets.
- **Market estimates have mainly been based on the feedback obtained through primary interviews with key industry participants**
- Inflation has not been accounted for in order to estimate the market
- Numbers may not add up due to rounding off

10.5 Secondary data sources

List of secondary sources includes but is not limited to:

- Hoover's
- Factiva
- Statista
- Secondary Research
- Investor Presentations
- Company Annual Reports

10.6 Disclaimer

The information and opinions in this report were prepared by the Domestic Market Research team. The information herein is believed to be reliable and has been obtained from authentic public sources.

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