

# ONCOLOGY

## THE REAL THERAPY

### FOR A BETTER TOMORROW

Selected clinical-trial signals visible by December 2025

#### 01 TARGETED + IMMUNOTHERAPY

INAVO120: inavolisib + palbociclib/fulvestrant produced median OS of 34.0 vs 27.0 months; HR 0.67 in PIK3CA-mutated HR+/HER2– advanced breast cancer.

**34.0 vs 27.0 mo OS**

#### 02 ADCs MOVE EARLIER

DESTINY-Breast09: trastuzumab deruxtecan + pertuzumab achieved median PFS 40.7 vs 26.9 months; HR 0.56 in first-line HER2+ metastatic breast cancer.

**44% lower progression/death risk**

#### 03 IMMUNOTHERAPY BECOMES MORE PRECISE

A phase III dMMR colon-cancer study reported a 50% reduction in recurrence/death with FOLFOX + atezolizumab vs chemotherapy alone in stage III disease.

**50% risk reduction**

#### 04 CELL THERAPY EXPANDS

CAR-T and other cellular therapies continued moving beyond classic hematologic indications, while biomarker selection and manufacturing remained critical execution levers.

**Platform + manufacturing matter**

Oncology is shifting from one-size-fits-all treatment toward biomarker-led combinations, targeted delivery and individualized immune/cell therapy.

# WHY ONCOLOGY INNOVATION IS A GLOBAL PATIENT SUPPORT SYSTEM

Latest global burden available by 31 Dec 2025: GLOBOCAN 2022.

**20.0M**

**new cancer cases  
worldwide**

GLOBOCAN 2022

**9.74M**

**cancer deaths  
worldwide**

GLOBOCAN 2022

**53.5M**

**people living within 5  
years of diagnosis**

5-year prevalence

**1 IN 5**

**people develop cancer  
in their lifetime**

Global cumulative risk

## 1 HIGH UNMET NEED

Cancer remains a leading global cause of death; the burden is projected to rise sharply with population growth and ageing.

## 2 BETTER SURVIVAL

The objective is no longer simply tumor shrinkage: durable control, overall survival and quality of life increasingly shape development.

## 3 PRECISION CARE

Biomarkers such as HER2, PIK3CA, dMMR and actionable oncogenic drivers are turning population treatment into patient segmentation.

## 4 ACCESS + EQUITY

A breakthrough only becomes meaningful when diagnosis, companion diagnostics, treatment delivery and affordability reach patients.

## 5 DATA-DRIVEN DEVELOPMENT

Real-world evidence, molecular profiling, ctDNA and smarter trial design can reduce uncertainty and improve patient selection.

**The strategic opportunity: connect science + data + access so that clinical innovation translates into measurable patient benefit.**

TOP 20 MID-SIZE / SPECIALIST BIOTECHS

CHALLENGING BIG PHARMA IN ONCOLOGY — DEC 2025

Selected for differentiated oncology platforms, clinical momentum or strategic relevance; “mid-size” is directional, not a strict market-cap threshold.

| #  | COMPANY                 | FOCUS                      | WHY IT MATTERS                      |
|----|-------------------------|----------------------------|-------------------------------------|
| 1  | BeOne Medicines         | Heme; solid tumors         | BTK/BCL-2 + global scale            |
| 2  | Genmab                  | Antibodies; bispecifics    | Differentiated antibody platforms   |
| 3  | Revolution Medicines    | RAS(ON) inhibitors         | RAS-driven solid tumors             |
| 4  | Summit Therapeutics     | PD-1/VEGF bispecific       | Ivonescimab / lung cancer           |
| 5  | Legend Biotech          | CAR-T                      | BCMA cell therapy                   |
| 6  | Iovance Biotherapeutics | TIL therapy                | Personalized cellular therapy       |
| 7  | Arcus Biosciences       | Immuno-oncology            | PD-1/TIGIT & combinations           |
| 8  | Zymeworks               | Bispecifics; ADCs          | Multispecific antibody platform     |
| 9  | Cullinan Therapeutics   | Targeted protein degraders | Degrader-based oncology             |
| 10 | Olema Oncology          | ER-targeted therapy        | Next-gen oral ER degraders          |
| 11 | Immunocore              | TCR bispecifics            | ImmTAC platform                     |
| 12 | IDEAYA Biosciences      | Precision oncology         | Synthetic lethality / biomarker-led |
| 13 | Relay Therapeutics      | Small molecules            | Protein-motion drug discovery       |
| 14 | Tango Therapeutics      | Immuno-oncology            | Genetically defined targets         |
| 15 | Xencor                  | Bispecific antibodies      | XmAb immune-cell engagers           |
| 16 | Janux Therapeutics      | T-cell engagers            | Tumor-activated T-cell platform     |
| 17 | Bicara Therapeutics     | Bispecific immunotherapy   | EGFR/TGF-β approach                 |
| 18 | Arcellx                 | CAR-T                      | Next-gen cell therapy platform      |
| 19 | Kura Oncology           | Targeted oncology          | Menin inhibition / AML              |
| 20 | Mersana Therapeutics    | ADCs                       | Next-gen ADC platform               |

Why this matters: platform companies can create new mechanisms, validate novel targets and become partners or future competitors — to the largest pharma portfolios.

Company selection is a Medifirm editorial shortlist based on public company materials, pipeline focus and oncology relevance available by Dec 2025; not an investment ranking or recommendation.

# THE FUTURE OF ONCOLOGY IS BRIGHT TOGETHER, WE CAN OUTSMART CANCER

Five strategic shifts to watch after 2025

**01****SCIENCE**

Novel targets, ADC payloads, bispecifics, RAS inhibition and cellular therapies.

**02****PRECISION**

Biomarker-led enrollment, molecular profiling and adaptive treatment selection.

**03****DATA**

Real-world evidence, ctDNA and integrated clinical data to improve decisions.

**04****ACCESS**

Diagnostics, manufacturing, affordability and delivery must scale with innovation.

**05****COLLABORATION**

Biotech + pharma + academia + health systems can compress development timelines.

**ONCOLOGY IS NOT ONLY ABOUT EXTENDING LIFE — IT IS ABOUT IMPROVING THE QUALITY, AND POSSIBILITY OF LIFE.**

## LET'S CONNECT. COLLABORATE. CURE.

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AI-powered intelligence for better decisions in healthcare & oncology

**Website**

**[medifirmintelledgeglobal.com](https://medifirmintelledgeglobal.com)**

**Support**

[support.medlii@medifirmintelledgeglobal.com](mailto:support.medlii@medifirmintelledgeglobal.com)

**USA-based Head**

[anthony@medifirmintelledgeglobal.com](mailto:anthony@medifirmintelledgeglobal.com)

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