

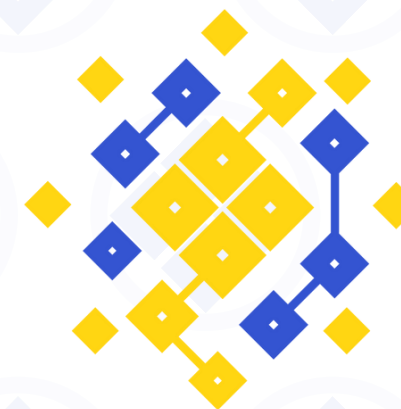
NGS Company Timeline

Company	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
454 / Curagen / Roche			★					★		155						✗										
Solexa / Illumina	★								600	★																+
Agencourt Genomics			★						120	★				✗												
Helicos						★					★				✗											
Complete Genomics								★					★			118										+
Ion Torrent										★				★	725											+
Pacific Biosciences							★							★												+
Oxford Nanopore								★										★								+
Intelligent Bio / QIAGEN								★							50			★				✗				
Genia / Roche												★					350									?
GNUbio / Bio-Rad												★					50			✗						
GenapSys													★									★		✗		
Element Biosciences																				★					★	+
Singular Biosciences																			★						★	+

Key:

- Founded ★
- Acquired (\$M) 100
- Commercialized ★
- Off-market ✗
- On-market in 2023 +

DALE
Principa
(301) 3
dale@
www.
9028 Co
Potomac



**Silent
Valley
Consulting**



(301) 326-6112



dale@yuzuki.org



www.silentvalleyconsulting.com