

# Using StageZero Life Sciences as a Case Study for the Publication of All Research Reports Online

written by Tracy Weslosky | June 28, 2021

Analyst Chris Thompson published a piece on [eResearch](#) on [StageZero Life Sciences Ltd.](#) (TSX: SZLS) this weekend titled, "StageZero Valuation Report Pegs Stock Price Between \$0.67 and \$14.14", the sub-header reads *Report Assumes Aristotle Revenue Impact Starting in Q3/2021.*

As the Publisher of InvestorIntel Corp., we are partial to [Chris Thompson](#) content as he is an outstanding guest columnist and knowledgeable host that occasionally shares his talents with InvestorIntel.com. Extensively educated (CFA, MBA, P.Eng) and experienced, if it was up to me I would like to publish all of Chris Thompson's eResearch reports in their entirety as they are released.

Does this mean I agree with him in his entirety? Hell, no. However, this is where I believe we need to remind the securities regulators that more and more of us are managing our own funds, and having access to more analysis is an example of the real tools we need to arm ourselves and evolve into the well equipped investors we want to be.

It simply makes sense. Why should we rely on savvy Reddit users when a well written report by a knowledgeable analyst can provide more comparative analysis than any chatboard debate can provide?

Presently, compliance regulations keeps both the companies and media from publishing analyst reports direct, and the companies these analysts cover cannot publish these reports on their sites, only the sources who have covered them. This process forces the investor to hunt down these analysts and seek reports direct from the writing source, which they are allowed to distribute as they see fit.

Ideally, I wish that we as investors could source these reports on the exchanges where the company is trading so we can review all of them. And we, as media could compare them and provide what would undoubtedly make some great content for debate and discussion and shut down these boards where anonymity prospers. After all, the companies and the media cannot act so irresponsibly, why should these chatboards be able to do this?

This is one of the reasons why our discussions are monitored on InvestorIntel.com.

While I appreciate that judging the talents of an analyst goes well beyond their writing competency and their experience, and includes tracking their record for performance, it is my opinion that the best analysts should be allowed to receive a fan base once they prove a track record for doing this incredibly important job in the investment food chain.

More and more people are investing their own funds and managing their own money, when are we going to allow the retail audience to be equipped with the same tools as the professionals?

Please keep in mind that it is important to note that we as financial media, while allowed to report on these valuations, must be extraordinarily cautious to remind our readers that we are not licensed investment advisors and many of our comments must be limited to creative disclaimers to ensure that if the share price does not achieve the goals outlined in any valuation

report that we have clearly stated that these numbers are not ours, but of the source cited and that we are neither liable or responsible.

But I believe (again, this is an opinion) that we do our investors a disservice by not being able to have a place where all of the research is published so that we may follow how the analyst formed their conclusion.

This weekend I asked Chris Thompson to explain how he did this Valuation Report on StageZero. He responded with a very thorough summary, which I enjoyed and thought I would share with you.

Chris Thompson response to the StageZero Valuation Report process was to provide the following summary:

*The Valuation Report use three valuation methodologies to calculate the price per share for StageZero: (1) Comparative Company Analysis using Revenue, (2) Prior Mergers and Acquisitions Analysis, and (3) Discounted Cash Flow.*

### ***Revenue from Aristotle® Fuels Valuation***

*StageZero is a life science and telehealth company that recently launched Aristotle®, which is its next generation, proprietary clinical test for the early detection of cancer.*

*Aristotle® is the first-ever multi-cancer panel that simultaneously screens for 10 cancers from a single sample of blood with high sensitivity and specificity for each cancer.*

*StageZero commercially launched Aristotle® in April and, on the same day, announced the [acquisition](#) of Health Clinics and Care Oncology (HC Companies) to launch an early cancer diagnostic program under the trade name AVRT that is based on Aristotle®.*

### ***Revenue Assumptions***

*In the valuation report, eResearch analyst Chris Thompson (me) assumed that StageZero's Aristotle® testing revenue will commence in the third quarter this year and StageZero will close the acquisition of the HC Companies in 2021.*

*In addition, StageZero's COVID-19 testing solutions generated revenue of over US\$6.5 million in the past three quarters, and I expect this revenue to continue for the rest of 2021.*

*From these assumptions, we estimated StageZero will generate US\$16.7 million of revenue in 2021 and will also book a one-year forward revenue of US\$23.0 million.*

### **Stock Price Valuation Summary**

*eResearch used the one-year forward revenue estimate of US\$23.0 million as a baseline and estimated revenue growth and EBITDA margins for the next five years, as well as calculating revenue multiples from various sources, with all assumptions outlined in the valuation report.*

*The three valuations methods are summarized here and presented in the table below:*

- 1. Revenue Multiples (3x to 12x revenue):** eResearch estimated that StageZero's stock price should be in the range of C\$1.24 to C\$3.99.
- 2. Prior Mergers & Acquisitions (1.2x to 45.x revenue):** eResearch estimated that StageZero's stock price should be in the range of C\$0.67 to C\$14.14.
- 3. Discounted Cash Flow (DCF) Method:** eResearch estimated that StageZero's stock price should be C\$3.18 in one year.

**Overall, the calculations estimated StageZero's stock price valuation between C\$0.67 and C\$14.14.**

## ***Final Thoughts***

*With StageZero's recent [C\\$7.2 million financing](#) strengthening its Balance Sheet and revenue from the COVID-19 testing bringing in additional cash flow, the company should have funds to complete the HC Companies acquisition and start commercializing Aristotle®.*

*StageZero closed Friday at C\$0.48 and currently has a Market Cap of less than C\$32 million.*

*The valuation estimates are well above StageZero's current stock price and illustrate the stock price's upside potential.*

### ***FIGURE 1: Summary of Stock Price Valuations***



So I must leave today's piece with a Disclaimer that we are not endorsing this Valuation Report and that StageZero is indeed an advertorial client for InvestorIntel Corp. To review the Disclaimers on this eResearch Valuation Report, please go the [Source](#).

Note from the Publisher: We will continue to review ways in which we can provide regular updates on reports to cultivate discussion and debate on the reports, their writers and of course – the companies they are covering. **Thank you for visiting InvestorIntel.com!**

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# Dr. Charles Meakin on the benefits of StageZero Life Sciences early diagnostic cancer test

written by InvestorNews | June 28, 2021

In a recent InvestorIntel interview, Tracy Weslosky speaks with Dr. Charles Meakin, Chief Medical Officer at [CareOncology.com](https://www.careoncology.com) on how [StageZero Life Sciences Ltd.](https://www.stagezerolife.com)'s (TSX: SZLS) early diagnostic cancer test will enhance the cancer treatment program that the Health Clinics offer their patients.

In this InvestorIntel interview, which may also be viewed on YouTube ([click here to subscribe to the InvestorIntel Channel](#)), Dr. Meakin went on to say that Care Oncology has developed a cancer treatment protocol that uses medicines that show 2-3 times increase in average median survival in cancer patients. He added, "We have treated over 5000 patients...our platform is very efficient and 80% of our patients re-enlist..." StageZero has developed the Aristotle® test which can simultaneously screen for 10 cancers from a single sample of blood with high sensitivity and specificity for each cancer. Dr. Meakin explained how StageZero and Care Oncology together can benefit cancer patients by combining early cancer diagnostics of StageZero and the cancer treatment protocol of Care Oncology.

To watch the complete interview, [click here](#)

## About Health Clinics

Founded in London, England in 2013, Health Clinics specialises in chronic inflammation and metabolic dysfunction and uses

telemedicine to provide specialist clinical services across Europe and North America. HC provides two main clinical offerings:

1. Under the trade name Care Oncology Clinic (“COC”), HC provides a patented and safe adjunctive treatment for all cancer types;
2. Under the trade name AVRT (pronounced “avert”), HC clinicians will provide a managed clinical service to help people to reduce their risk of developing chronic diseases, including cancer, using a proportionate and tolerable protocol.

### **About StageZero Life Sciences, Ltd.**

StageZero Life Sciences is dedicated to the early detection of multiple diseases through whole blood tests. The Company’s next-generation test, Aristotle®, is the first-ever multi-cancer panel for simultaneously screening for 10 cancers from a single sample of blood with high sensitivity and specificity for each cancer. StageZero’s full service, telehealth platform includes access to physicians and phlebotomists who can prescribe and draw samples for individuals and groups, and the Company operates a CAP accredited and CLIA certified high-complexity reference laboratory in Richmond, Virginia. In addition, leveraging its specialty in polymerase chain reaction (PCR) testing for the early identification of cancer through blood, StageZero also provides both COVID PCR testing (swab and saliva) and blood test analysis (Antibody testing).

To learn more about StageZero Life Sciences Ltd., [click here](#)

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# Jack Lifton with StageZero's James Howard-Tripp on the advantages of non-invasive cancer diagnostic testing

written by InvestorNews | June 28, 2021

In a recent InvestorIntel interview, Jack Lifton speaks with James Howard-Tripp, Chairman and CEO of [StageZero Life Sciences Ltd.](#) (TSX: SZLS) about StageZero's Aristotle® test for early cancer diagnosis and why the timing is right as the world prepares catch-up from the impact of COVID-19.

In this InvestorIntel interview, which may also be viewed on YouTube ([click here to subscribe to the InvestorIntel Channel](#)), James went on to discuss the marketing advantages surrounding StageZero and the Telehealth infrastructure for Aristotle®. Aristotle®, a test that can simultaneously screen for 10 cancers from a single sample of blood with high sensitivity and specificity for each cancer; was something Jack was particularly interested in exploring the competitive advantages for versus the more invasive testing processes. For instance, StageZero's proprietary mRNA technology platform that has been validated in more than 9,000 patients for colorectal cancer – the ColonSentry®, is such an example.

To watch the complete interview, [click here](#)

## About StageZero Life Sciences, Ltd.

StageZero Life Sciences is dedicated to the early detection of multiple diseases through whole blood tests. The Company's next-generation test, Aristotle®, is the first-ever multi-cancer

panel for simultaneously screening for 10 cancers from a single sample of blood with high sensitivity and specificity for each cancer. StageZero's full service, telehealth platform includes access to physicians and phlebotomists who can prescribe and draw samples for individuals and groups, and the Company operates a CAP accredited and CLIA certified high-complexity reference laboratory in Richmond, Virginia. In addition, leveraging its specialty in polymerase chain reaction (PCR) testing for the early identification of cancer through blood, StageZero also provides both COVID PCR testing (swab and saliva) and blood test analysis (Antibody testing).

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## **eResearch's Chris Thompson with James Howard-Tripp on StageZero's COVID-19 testing revenue**

written by InvestorNews | June 28, 2021

In a recent InvestorIntel interview, Chris Thompson speaks with James Howard-Tripp, Chairman and CEO of [StageZero Life Sciences Ltd.](#) (TSX: SZLS) about StageZero's COVID-19 testing revenue and [Q1 financial results](#).

In this InvestorIntel interview, which may also be viewed on YouTube ([click here to subscribe to the InvestorIntel Channel](#)), James went on to say that StageZero, in its Q1 financial

results, reported a “healthy revenue with more than 60% margin from COVID testing”. He added that the company “has signed a series of long-term contracts” and expects the revenue to remain healthy for the rest of the year and will continue to build as revenues from Aristotle as part of the AVRT Program starts to come in. Touching on the recently [announced](#) Rexall partnerships to sell StageZero COVID-19 saliva test kits, James adds how the acquisition of Health Clinics Limited will create multiple revenue streams and make the launch of its multi-cancer test more impactful.

To watch the complete interview, [click here](#)

### **About StageZero Life Sciences, Ltd.**

StageZero Life Sciences is dedicated to the early detection of multiple diseases through whole blood tests. The Company’s next-generation test, Aristotle®, is the first-ever multi-cancer panel for simultaneously screening for 10 cancers from a single sample of blood with high sensitivity and specificity for each cancer. StageZero’s full service, telehealth platform includes access to physicians and phlebotomists who can prescribe and draw samples for individuals and groups, and the Company operates a CAP accredited and CLIA certified high-complexity reference laboratory in Richmond, Virginia. In addition, leveraging its specialty in polymerase chain reaction (PCR) testing for the early identification of cancer through blood, StageZero also provides both COVID PCR testing (swab and saliva) and blood test analysis (Antibody testing).

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# James Howard-Tripp on StageZero's Q1 Results, Aristotle as part of the AVRT Program and the Rexall Partnership for COVID-19 Saliva Tests

written by InvestorNews | June 28, 2021

In a recent InvestorIntel interview, Tracy Weslosky spoke with James Howard-Tripp, Chairman and CEO of [StageZero Life Sciences Ltd.](#) (TSX: SZLS) about StageZero's [first-quarter financial results](#), Aristotle as part of the AVRT Program and the Rexall Partnership for COVID-19 Saliva Tests.

In this InvestorIntel interview, which may also be viewed on YouTube ([click here to subscribe to the InvestorIntel Channel](#)), James went on to provide an update on the launch of Aristotle as part of the AVRT Program and StageZero's intent to acquire Health Clinics Limited. Unlike COVID-19 tests, cancer tests in the U.S. have to be prescribed by a physician. James explained how Health Clinics as “part and parcel” of StageZero will help them reach patients and have a bigger impact than trying to launch a stand-alone cancer-detection service. Driven by the goal “...to reduce the incidence of late-stage cancer by 50% over the next decade through early interventions”, James said that the acquisition of Health Clinics will set StageZero in liquid biopsy, early detection of disease and telemedicine, three of the highest growth areas within healthcare right now.

To watch the complete interview, [click here](#)

## About StageZero Life Sciences, Ltd.

StageZero Life Sciences is dedicated to the early detection of multiple diseases through whole blood tests. The Company's next-generation test, Aristotle®, is the first-ever multi-cancer panel for simultaneously screening for 10 cancers from a single sample of blood with high sensitivity and specificity for each cancer. StageZero's full service, telehealth platform includes access to physicians and phlebotomists who can prescribe and draw samples for individuals and groups, and the Company operates a CAP accredited and CLIA certified high-complexity reference laboratory in Richmond, Virginia. In addition, leveraging its specialty in polymerase chain reaction (PCR) testing for the early identification of cancer through blood, StageZero also provides both COVID PCR testing (swab and saliva) and blood test analysis (Antibody testing).

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## **StageZero Life Sciences James Howard-Tripp on the recent LOI to Acquire Health Clinics Limited**

written by InvestorNews | June 28, 2021

In a recent InvestorIntel interview, Tracy Weslosky spoke with James Howard-Tripp, Chairman and CEO of [StageZero Life Sciences Ltd.](#) (TSX: SZLS) about StageZero's Q4 and Year End [Financial](#)



[Results](#) and the recent signing of a [letter of intent](#) to acquire Health Clinics Limited.

In this InvestorIntel interview, which may also be viewed on YouTube ([click here to subscribe to the InvestorIntel Channel](#)), James went on to say that StageZero ended Q4 with revenues that were up two times from Q3. He further added that the Health Clinics deal will give StageZero access to a network of oncologists and cancer clinics. This will provide StageZero access to an existing patient network to which Aristotle may be administered to. Aristotle® is a multi-cancer panel for simultaneously screening for 10 cancers from a single sample of blood with high sensitivity and specificity for each cancer.

To watch the complete interview, [click here](#)

### **About StageZero Life Sciences, Ltd.**

StageZero Life Sciences is dedicated to the early detection of multiple disease states through whole blood. The Company operates a CAP accredited and CLIA certified high complexity reference laboratory based in Richmond, Virginia. A specialist in PCR testing for the early identification of Cancer through blood, the Company is uniquely positioned to provide both COVID PCR testing (swab and saliva) and blood test analysis (Antibody testing). Our full service, telehealth platform includes access to physicians and phlebotomist who can prescribe and draw samples for individuals and groups. As we provide COVID-19 test during this Pandemic, we continue making progress with our mission to eradicate late stage cancers through early detection. Our next generation test, Aristotle®, is a multi-cancer panel for simultaneously screening for 10 cancers from a single sample of blood with high sensitivity and specificity for each cancer.

To know more about StageZero Life Sciences Ltd., [click here](#)

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# With Cancer-Testing Telehealth Platform on Track for Q1 Launch, StageZero Shareholders Await Covid-19 Testing-Related Revenue Results

written by InvestorNews | June 28, 2021

StageZero Life Sciences Ltd. (TSX: SZLS | OTC: GNWSF | FSE: 61N) is a life science and telehealth company that is focusing on launching Aristotle®, which is its next-generation, proprietary clinical test for the early detection of cancer. From one blood sample, it can screen for 10 cancers.

The company is on track to commercially launch the Aristotle® offering in the first quarter of 2021. In advance of the launch, the company has doubled in size since March 2020 and recently raised C\$7.2 million to load up the treasury.

With its planned rollout of Aristotle®, StageZero has built a fully integrated telehealth platform that supports its cancer diagnostics program. With the current stay-at-home orders imposed by governments, telehealth has emerged as a viable alternative to access health care and diagnostic services.

## **Aristotle® Built on a Proven Platform**

Aristotle® is built on StageZero's proprietary Sentinel Principle Technology and validated on over 10,000 patients.

Aristotle® is literally based on 20 years of development work and building up the company's experiences with other solutions, such as ColonSentry®, a test for colorectal cancer, which was launched in 2019.

To accommodate the step-function growth with its new service, StageZero's lab has been expanding in both people and equipment to launch the new offering as well as to accommodate its recent Covid-19 testing service.

### **Cancer Diagnosis – a Billion Dollar Market**

The continued rise of cancer cases and deaths has shifted the attention towards the adoption of early detection and diagnosis techniques for cancer, to help lower health costs and increase survival rates.

According to a recent industry report, the Cancer Diagnostics market was valued at US\$144 billion in 2020 and is forecasted to reach US\$192 billion by 2024, growing by 7.5% annually.

One of the largest growth segments is diagnostic solutions aimed at cancer detection, cardiovascular disease, or eye issues.

### **Quickly Added Covid Testing in 2020**

Last year, to help out during the Covid-19 crisis, StageZero launched a Covid-19 testing service, offering both the serology point-of-care and lab-based polymerase chain reaction (PCR) tests.

StageZero's Covid-19 testing solution helped to generate revenue of US\$1.61 million in the third quarter of 2020. The company forecasted that Covid-19 testing-related revenue should be higher in the fourth quarter of 2020 and even higher in the first quarter of 2021.

The company found success by partnering with over 55 groups including Mercer, UDoTest, and the City of Alpharetta, to name just a few.

For Covid-19 testing, speed and accuracy are paramount and the telehealth infrastructure that StageZero put in place is paying off. The tests are done, packaged up, sent in overnight, processed the next day, and reported back to the patient.

### **Saliva PCR Test to Help Travel Industry Rebound**

Last October, StageZero announced that it launched a saliva-based PCR test that makes it easier for patient sample collection.

The saliva-based PCR test targets the home diagnostic market and for use by companies and communities in remote areas where Covid-19 testing is more challenging.

Travel announcements:

- On January 13, Ichor Blood Services and StageZero launched a Covid-19 testing program for Canadians returning home from the U.S.
- Last year, StageZero was selected by the Government of Barbados to provide Covid-19 testing services to travelers visiting Barbados from Canada and the U.S.
- Also announced last year, StageZero reported the initiation of testing for travel to China with a Canadian partner.

In the case of the Ichor-StageZero partnership, this testing program allows travelers to take a lab-quality Covid-19 test kit with them to the U.S. and complete their witnessed test remotely prior to returning home.

### **Final Thoughts**

StageZero is a cancer testing company, capitalizing on its telehealth platform, and should benefit financially in 2021 from the rollout of Aristotle® that is planned for this quarter.

In the meantime, the company has scaled up to meet the demand for Covid-19 testing and this revenue should continue to grow quarter-over-quarter in 2021 as the Aristotle® service rolls out.

With the growing need for both Covid-19 and cancer testing, revenue could double for the company this year.

StageZero closed the week at \$1.09, up 6% on the day, and currently has a Market Cap of almost \$65 million.