

HEALTHCARE

January to July 2026 Update

Healthcare expanded AI legibility through controlled interpretation: more entities became visible and more reached High capability, while Defensive posture gained ground.

50-ENTITY MATCHED PANEL

DATA AS OF 30 JUL 2026

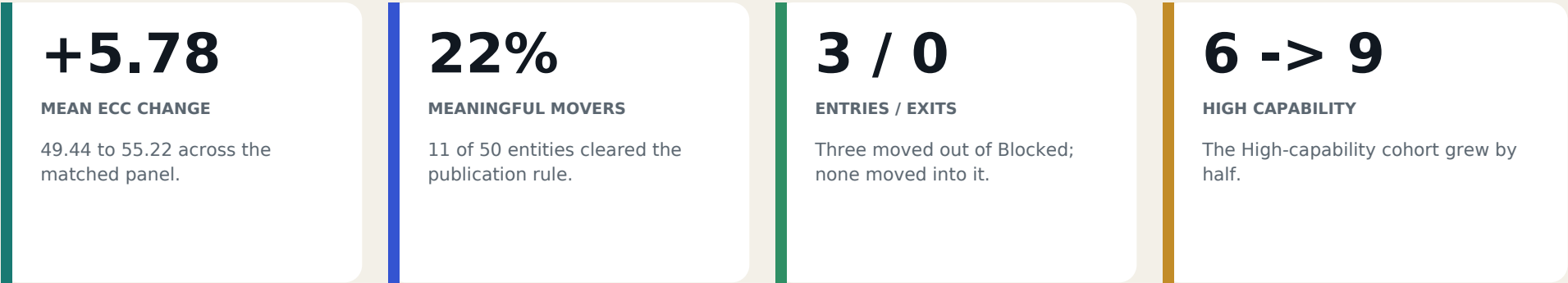
ECI-ECC-V1

Capital allocation, M&A, and enterprise legibility

REVISION V1.0 / DATASET 2.0.0

Controlled interpretation replaced pure avoidance

The sector's mean rose, but the more consequential shift was structural: legibility expanded while liability-aware posture remained visible.



The signal

Healthcare did not become simply more open. Open posture remained flat at 32 entities, while Defensive posture rose from 6 to 9 and Blocked fell from 12 to 9. The sector gained interpretability through controlled access, stronger evidence, and more deliberate constraints.

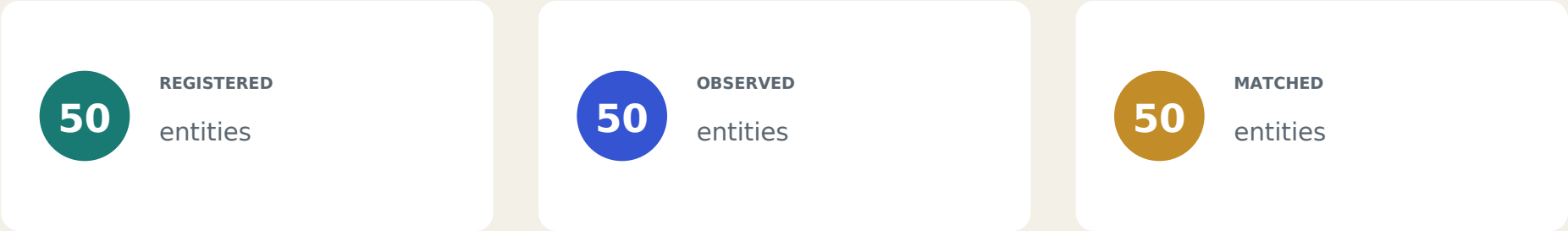
Why it matters

For capital allocators and deal teams, the risk is no longer only whether an entity appears in AI-mediated research. It is whether regulated claims, clinical authority, product identity, and liability boundaries remain coherent when machines synthesize them at speed.

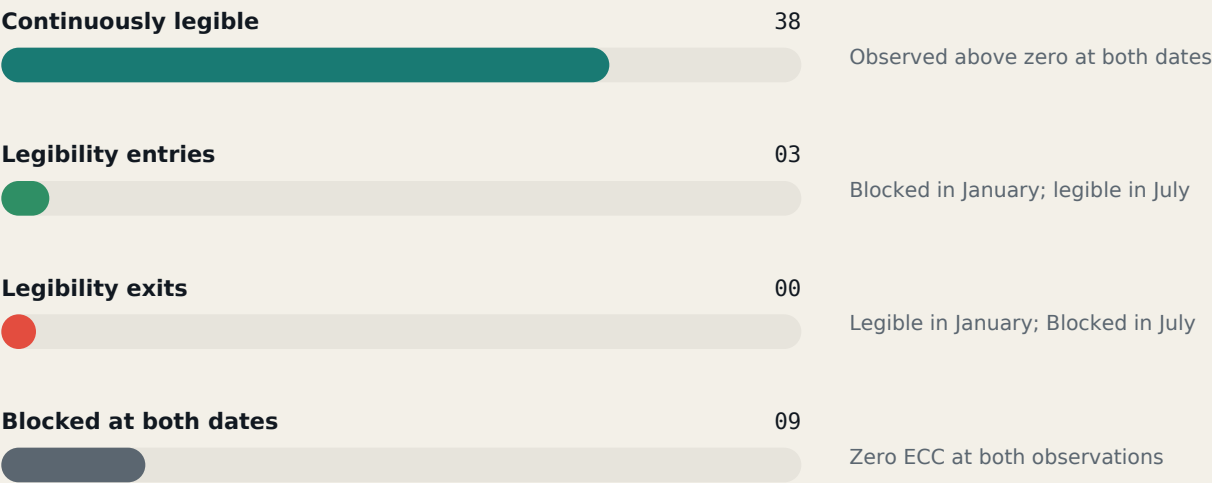
Source: EXMXC Entity Clarity dataset v2.0.0; observations 20 Jan and 30 Jul 2026.

A complete matched longitudinal panel

Every Healthcare entity in the January baseline is observed again in July; no imputation or panel substitution is required.



Observation states



QA STATUS

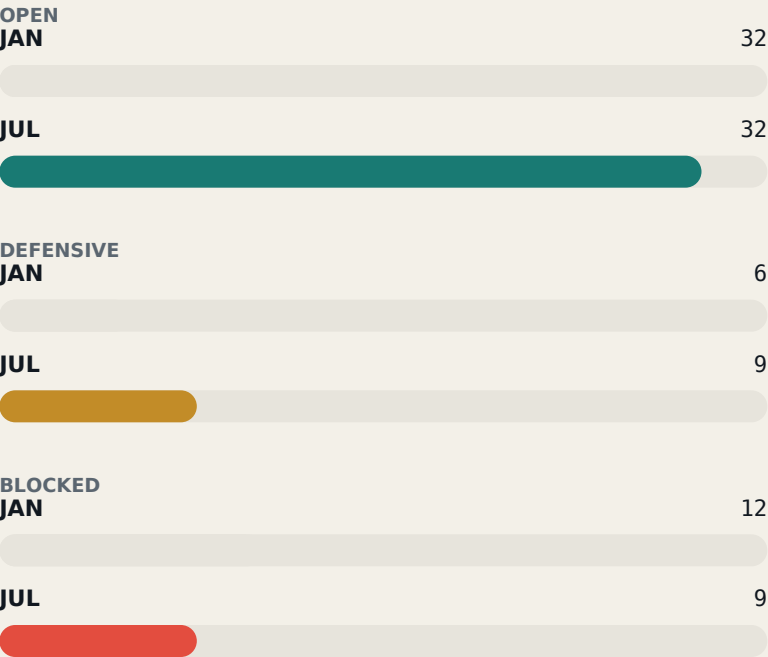
- 50/50 exact entity match
- 0 source-delta mismatches
- 0 blocked-score exceptions
- Ordered baseline preserved

Source: EXMXC Entity Clarity dataset v2.0.0; observations 20 Jan and 30 Jul 2026.

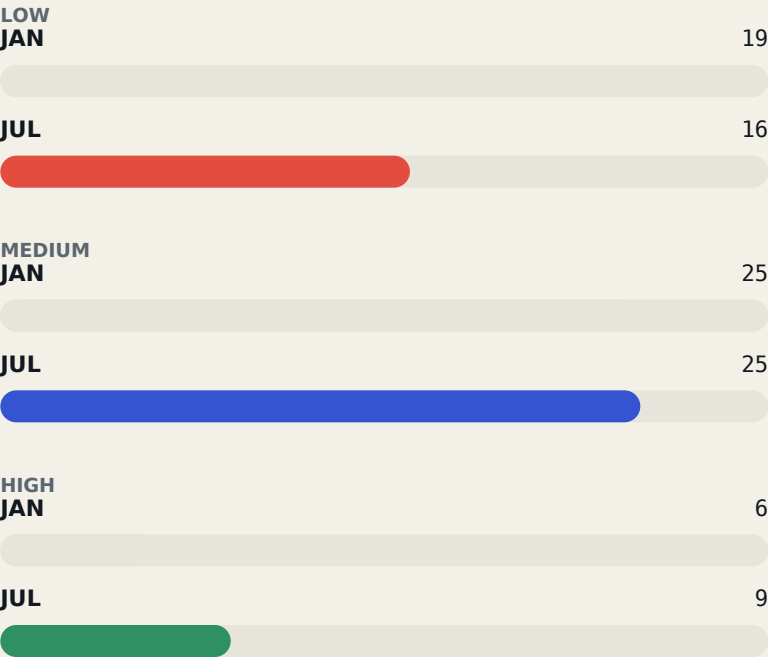
Visibility broadened; constraint remained part of the design

The sector's capability profile improved without abandoning liability-aware posture.

Posture



Capability



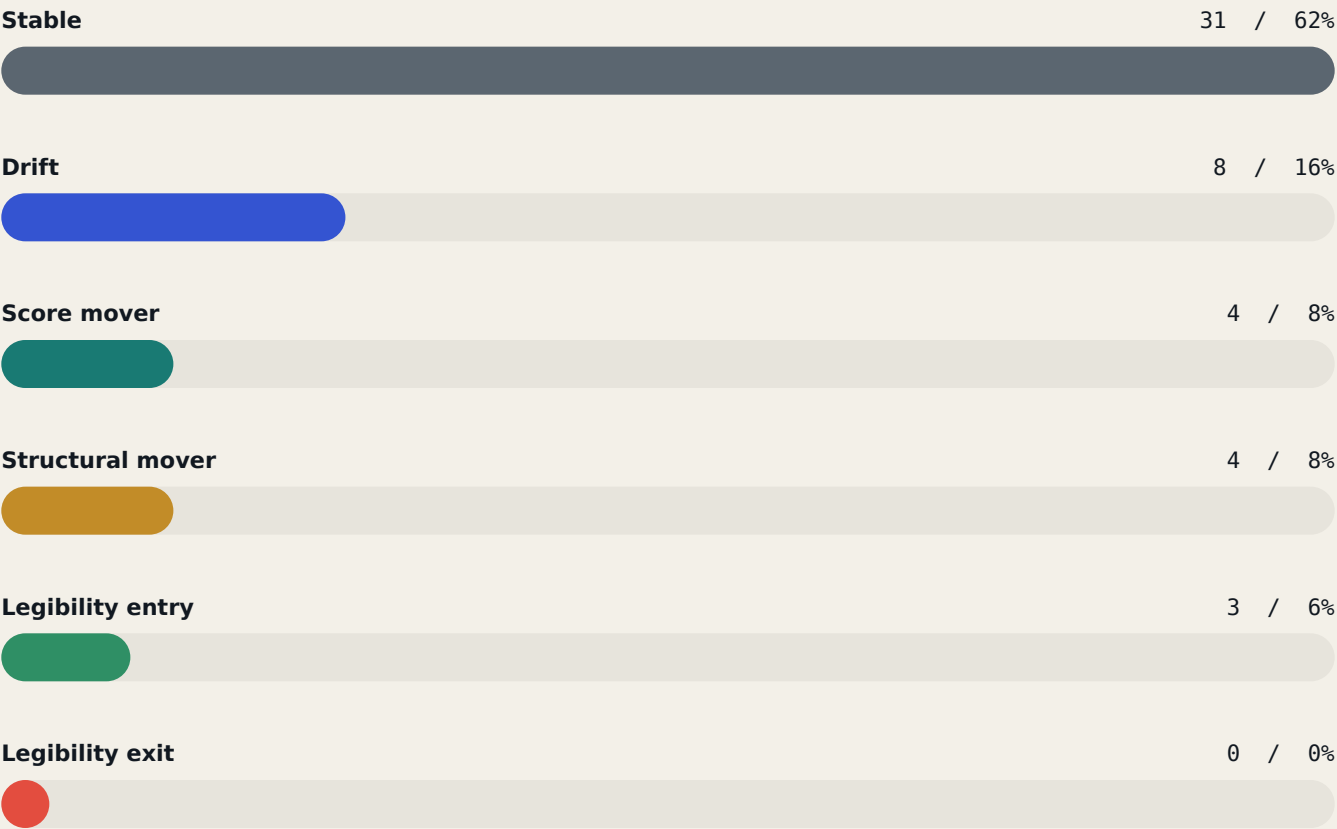
Interpretation

Open posture was unchanged. All net posture movement came from Blocked entities entering legibility and one continuously legible entity adopting a Defensive posture. High capability gained three entities, mirroring the fall in Low capability.

Source: EXMXC Entity Clarity dataset v2.0.0; observations 20 Jan and 30 Jul 2026.

Most entities held steady; a small set changed the sector

Meaningful movement includes entries, exits, structural changes, and score changes of at least five points.



11

MEANINGFUL MOVERS

22% of the panel

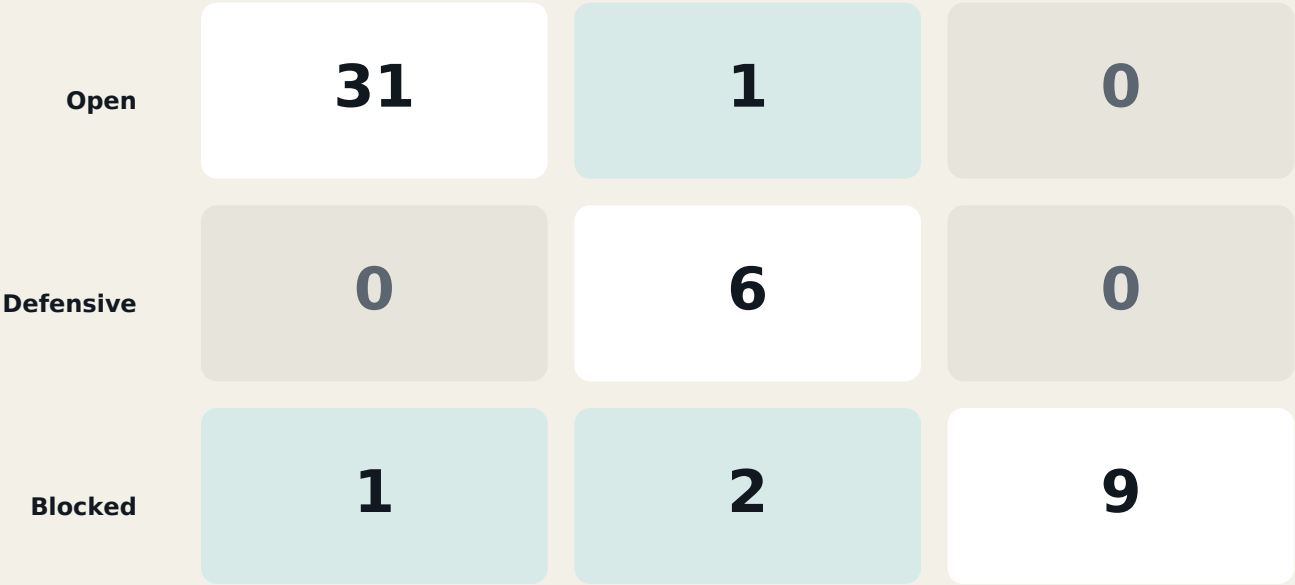
The sector clears both longitudinal publication gates: at least 20% meaningful movers and at least three entries or exits.

Source: EXMXC Entity Clarity dataset v2.0.0; observations 20 Jan and 30 Jul 2026.

Three entries, zero exits, and one move toward Defensive control

The strongest posture signal is not openness alone; it is the normalization of bounded, governed interpretation.

JANUARY -> JULY



What changed

Two blocked entities entered with Defensive posture and one entered Open. One continuously legible entity moved from Open to Defensive. There were no moves into Blocked and no moves from Defensive to Open.

Strategic reading

Healthcare's legibility frontier widened through permissioned access and stronger capability. That pattern is compatible with regulatory burden: more machine-readable meaning, paired with clearer boundaries around what can be inferred or reused.

Source: EXMXC Entity Clarity dataset v2.0.0; observations 20 Jan and 30 Jul 2026.

Eleven entities carried the meaningful change

Names and structural transitions are shown here; authoritative entity-level ECC values remain in the Index.

Bayer Blocked/Low -> Defensive/High LEGIBILITY ENTRY	Pfizer Open/Medium; material score change SCORE MOVER
Becton Dickinson Blocked/Low -> Defensive/Medium LEGIBILITY ENTRY	Johnson & Johnson Open/Medium -> Defensive/Medium STRUCTURAL MOVER
Jiangsu Hengrui Medicine Blocked/Low -> Open/Low LEGIBILITY ENTRY	Regeneron Pharmaceuticals Open/Medium; material score change SCORE MOVER
Daiichi Sankyo Open/Low -> Open/Medium STRUCTURAL MOVER	Bristol-Myers Squibb Open/High; material score change SCORE MOVER
WuXi AppTec Defensive/Medium -> Defensive/High STRUCTURAL MOVER	Veeva Systems Open/High; material score change SCORE MOVER
Boston Scientific Open/Medium -> Open/High STRUCTURAL MOVER	

Source: EXMXC Entity Clarity dataset v2.0.0. Entity-level ECC values appear only in the authoritative Index.

Four patterns define the Healthcare update

The sector's improvement is real, but it is uneven and strategically consequential.

01

Liability-aware legibility

Defensive posture grew alongside sector visibility. Healthcare is learning to be machine-interpretable without treating every claim, workflow, or evidence boundary as open.

02

Capability concentration

High capability expanded, but the change is concentrated in a limited cohort. Sector means can hide a widening execution gap between leaders and the stable majority.

03

Entry over exit

Three entities became legible and none exited. The direction of travel is constructive, but a remaining blocked cohort still creates discovery, diligence, and narrative continuity risk.

04

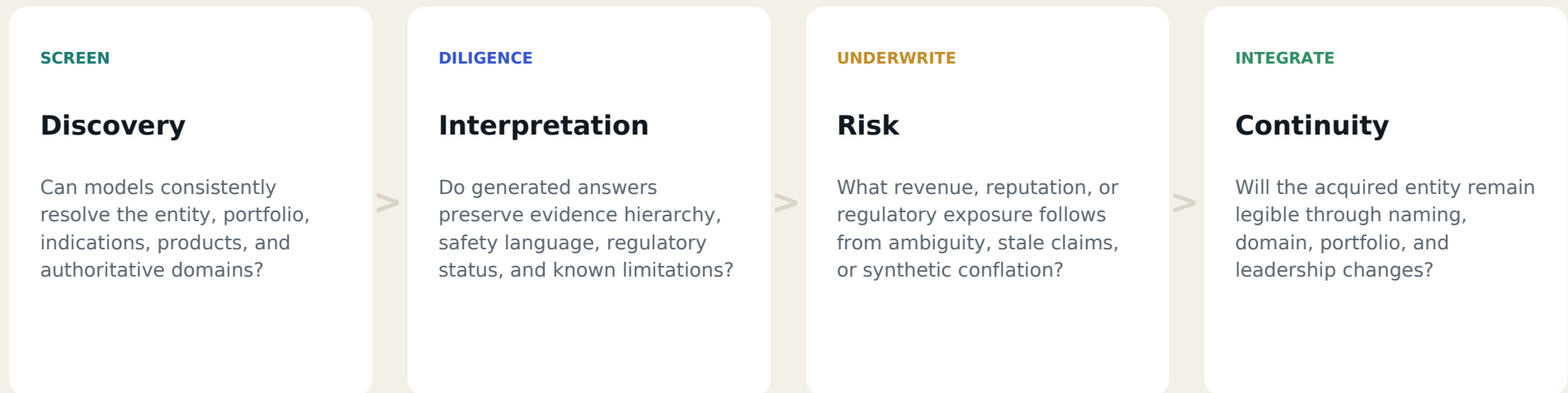
Clinical meaning as infrastructure

Product names, indications, trial evidence, safety language, and corporate identity must resolve coherently. Entity clarity is now part of the information architecture around care and capital.

Source: EXMXC Entity Clarity dataset v2.0.0; observations 20 Jan and 30 Jul 2026.

Entity clarity is now a diligence and integration variable

A healthcare asset can be clinically strong and still lose value when AI-mediated interpretation fragments its identity, evidence, or liability boundaries.



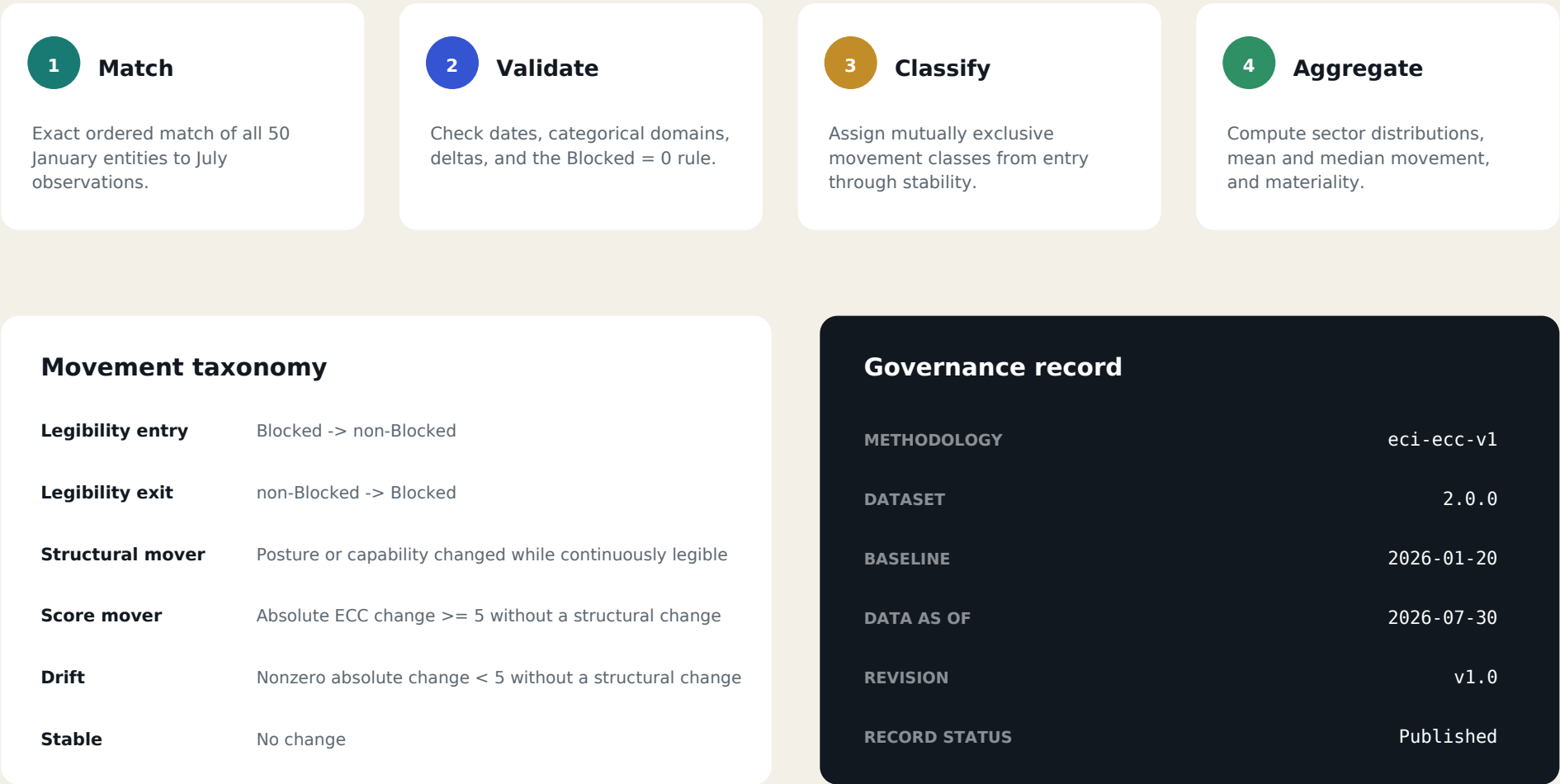
Decision rule

Treat ECC as a machine-interpretability and governance signal—not as clinical quality, investment quality, or enterprise value. Use it to identify where diligence must test the fidelity of AI-mediated meaning and where integration plans need explicit identity controls.

Source: EXMXC Entity Clarity dataset v2.0.0; observations 20 Jan and 30 Jul 2026.

A governed matched-panel comparison

The report preserves one entity roster and compares posture, capability, and ECC at two observation dates.



Source: EXMXC Entity Clarity dataset v2.0.0; observations 20 Jan and 30 Jul 2026.

How to read the entity-level record

The following two pages are the authoritative longitudinal Index. Every ECC value is paired with posture and capability.

Entity

The matched organization name in the governed panel.

Jan / Jul posture

Open, Defensive, or Blocked access posture.

Jan / Jul capability

Low, Medium, or High demonstrated capability.

Jan / Jul ECC

Entity Clarity Coefficient for the observation date.

Delta

July ECC minus January ECC.

Class

Mutually exclusive longitudinal movement class.

Important ECC measures entity clarity in AI-mediated interpretation. It is not a rating of clinical quality, care outcomes, financial performance, management quality, or investment attractiveness.

Source: EXMXC Entity Clarity dataset v2.0.0; observations 20 Jan and 30 Jul 2026.

Healthcare entities 1-25 of 50

January and July observations shown together. This is the sole entity-level ECC record in the report.

# / Entity	Jan P	Jan C	ECC	Jul P	Jul C	ECC	Delta	Class
01 Eli Lilly	Blocked	Low	0	Blocked	Low	0	0	Stable
02 Johnson & Johnson	Open	Medium	63	Defensive	Medium	72	+9	Structural Mover
03 AbbVie	Blocked	Low	0	Blocked	Low	0	0	Stable
04 Roche	Defensive	Medium	63	Defensive	Medium	63	0	Stable
05 UnitedHealth Group	Open	Medium	70	Open	Medium	72	+2	Drift
06 AstraZeneca	Open	Medium	66	Open	Medium	66	0	Stable
07 Merck & Co.	Open	High	82	Open	High	84	+2	Drift
08 Novartis	Open	High	83	Open	High	84	+1	Drift
09 Novo Nordisk	Open	Low	49	Open	Low	49	0	Stable
10 Thermo Fisher Scientific	Blocked	Low	0	Blocked	Low	0	0	Stable
11 Abbott Laboratories	Defensive	Medium	73	Defensive	Medium	73	0	Stable
12 Intuitive Surgical	Open	Low	5	Open	Low	5	0	Stable
13 Amgen	Open	Medium	69	Open	Medium	68	-1	Drift
14 Danaher	Open	Medium	73	Open	Medium	73	0	Stable
15 Gilead Sciences	Open	Medium	73	Open	Medium	73	0	Stable
16 Pfizer	Open	Medium	66	Open	Medium	78	+12	Score Mover
17 Boston Scientific	Open	Medium	63	Open	High	86	+23	Structural Mover
18 Stryker	Open	Low	30	Open	Low	28	-2	Drift
19 Medtronic	Defensive	Medium	68	Defensive	Medium	68	0	Stable
20 Sanofi	Open	Medium	69	Open	Medium	69	0	Stable
21 Bristol-Myers Squibb	Open	High	92	Open	High	85	-7	Score Mover
22 Vertex Pharmaceuticals	Blocked	Low	0	Blocked	Low	0	0	Stable
23 HCA Healthcare	Defensive	Medium	77	Defensive	Medium	77	0	Stable
24 CVS Health	Open	Medium	67	Open	Medium	67	0	Stable
25 GSK (GlaxoSmithKline)	Open	Medium	66	Open	Medium	68	+2	Drift

Source: EXMXC Entity Clarity dataset v2.0.0. P = posture; C = capability. Baseline 20 Jan 2026; current 30 Jul 2026.

Healthcare entities 26-50 of 50

January and July observations shown together. This is the sole entity-level ECC record in the report.

# / Entity	Jan P	Jan C	ECC	Jul P	Jul C	ECC	Delta	Class
26 McKesson	Open	Medium	65	Open	Medium	65	0	Stable
27 Chugai Pharmaceutical	Open	Medium	60	Open	Medium	60	0	Stable
28 Elevance Health	Open	High	81	Open	High	81	0	Stable
29 Regeneron Pharmaceuticals	Open	Medium	66	Open	Medium	74	+8	Score Mover
30 The Cigna Group	Open	Low	50	Open	Low	50	0	Stable
31 Merck KGaA	Blocked	Low	0	Blocked	Low	0	0	Stable
32 Siemens Healthineers	Open	Medium	66	Open	Medium	66	0	Stable
33 Jiangsu Hengrui Medicine	Blocked	Low	0	Open	Low	33	+33	Legibility Entry
34 UCB	Open	Medium	75	Open	Medium	75	0	Stable
35 CSL Limited	Open	Medium	73	Open	Medium	73	0	Stable
36 Zoetis	Open	Medium	68	Open	Medium	68	0	Stable
37 Becton Dickinson	Blocked	Low	0	Defensive	Medium	63	+63	Legibility Entry
38 Takeda Pharmaceutical	Open	High	80	Open	High	80	0	Stable
39 argenx	Defensive	Low	53	Defensive	Low	52	-1	Drift
40 Lonza Group	Blocked	Low	0	Blocked	Low	0	0	Stable
41 Edwards Lifesciences	Open	Medium	64	Open	Medium	64	0	Stable
42 Bayer	Blocked	Low	0	Defensive	High	80	+80	Legibility Entry
43 Alnylam Pharmaceuticals	Open	Medium	61	Open	Medium	63	+2	Drift
44 Cardinal Health	Blocked	Low	0	Blocked	Low	0	0	Stable
45 Galderma	Open	Low	59	Open	Low	59	0	Stable
46 WuXi AppTec	Defensive	Medium	60	Defensive	High	85	+25	Structural Mover
47 Sun Pharmaceutical	Blocked	Low	0	Blocked	Low	0	0	Stable
48 Daiichi Sankyo	Open	Low	41	Open	Medium	73	+32	Structural Mover
49 Agilent Technologies	Blocked	Low	0	Blocked	Low	0	0	Stable
50 Veeva Systems	Open	High	83	Open	High	89	+6	Score Mover

Source: EXMXC Entity Clarity dataset v2.0.0. P = posture; C = capability. Baseline 20 Jan 2026; current 30 Jul 2026.

Healthcare is becoming more interpretable - and more deliberate.

The strategic advantage is not unrestricted exposure. It is the ability to remain discoverable, attributable, and coherent while preserving the clinical and legal boundaries that make interpretation safe.

Authoritative data

`mcp.exmxc.ai/datasets/entity_clarity/releases/latest`

Entity Clarity Index hub

`exmxc.ai/entity-clarity-index`