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Weekly Newsletter

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AMB | Investment Banking

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Market Updates

[Employers say increased GLP-1 coverage drives up costs: survey](#)

Nearly eight in 10 employers say GLP-1 drugs are a major contributor to rising healthcare costs, according to a new survey from Business Group on Health. The survey was conducted between February and March among 105 members of the non-profit organization. Most surveyed employers covered GLP-1s for diabetes, though 67% of respondents reported covering the drug for weight management. Of respondents covering the use of GLP-1s, 10% said they would likely not continue coverage through 2027 and 72% said they would likely continue coverage.

[Hospital at home linked to lower ED visits, in-hospital mortality: study](#)

Providing hospital-level care in patients' homes was linked to better clinical outcomes, suggesting hospital-at-home programs could serve as a safe and efficient alternative to traditional inpatient care, according to a study published this week in JAMA Network Open. Hospital at home was associated with decreased emergency department use within 30 days of discharge and lower in-hospital mortality. But patients at hospital-at-home programs saw no significant difference in hospital readmissions within 30 days.

[Three wins for AI in the revenue cycle](#)

Early wins for artificial intelligence in the revenue cycle can be broken down into three distinct areas, according to Brian Kenah, chief technology officer at EnableComp. The first is around document intelligence for all of the unstructured content that hospitals need to sort through, such as contracts, fee schedules and state regulations. Historically, these have sat in a PDF document that a human has to pull up.

Healthcare Operators

[Staffing firm Cross Country Healthcare to be acquired by Knox Lane for \\$437 million](#)

Cross Country Healthcare is going private in a \$437 million deal that will bring travel nursing company under investment firm Knox Lane. The definitive agreement was announced Wednesday evening, and is expected to close in the third quarter pending customary closing conditions including stockholder and regulatory approvals. It prices Cross Country's stock at \$13.25 per share, a roughly 31% premium over Wednesday's closing price, and would see Cross Country continue to operate under its own brand. Cross Country is a 40-year-old company that has been publicly traded on the NASDAQ stock exchange since 2001.

[Carlyle acquires 2 RCM companies](#)

Global investment firm Carlyle has acquired a majority stake in revenue cycle management companies Knack RCM and EqualizeRCM. Knack and Equalize are complementary RCM providers serving rural hospitals, physician groups, durable medical equipment providers and other specialty provider segments, according to a May 4 Carlyle news release. The combined platform will "enhance operational scale and diversification, broaden the delivery footprint, strengthen leadership depth and help accelerate AI capabilities."

[Nitra Launches "Future of Care Initiative," Commits \\$20 Billion in Financing for Independent Medical Practices](#)

Nitra, the leading AI-native operating platform for healthcare practices, today announced the Future of Care Initiative, a \$20 billion financing commitment through 2028 to provide capital, technology, and operational infrastructure to independent physicians and medical practices across all 50 states. The initiative comes at a time when independent physicians face mounting pressure from slow-paying payers, rising administrative burden, and increasing consolidation across the healthcare industry.

Healthcare Legislative and Legal Updates

[Preparing for the 2026 HIPAA changes: A practical guide for healthcare leaders](#)

HIPAA updates expected in 2026 will strengthen requirements to protect electronic protected health information (ePHI) and remove ambiguity regarding security safeguards. Enforcement will become more consistent and organizations will have a limited window (as short as 60 days) to comply once finalized. Healthcare organizations should begin preparing by assessing risks, strengthening controls such as encryption and multi-factor authentication (MFA) and documenting how patient data is secured and accessed. Early preparation allows organizations to spread out effort and minimize disruption.

[Tariffs: Where things stand for healthcare](#)

The U.S. tariff landscape has shifted dramatically in 2026, and healthcare is caught in the middle. From a landmark Supreme Court ruling to new duties on branded drugs, the policy environment has moved fast and shows no signs of settling. Health system supply chain and finance leaders are watching all these threads closely, and most are preparing for continued volatility regardless of what the final policy landscape looks like.

[States eye aid to prop up distressed hospitals amid federal Medicaid cuts](#)

Across the U.S., hospitals and patient advocates are looking to state lawmakers and local officials to help shore up shaky finances. In California, Assembly member Esmeralda Soria, a Democrat representing Fresno, is pushing legislation to expand a 2023 "distressed hospital loan fund" that allocated nearly \$300 million in zero-interest loans to 16 hospitals in the state, including \$14 million to MLK. The state would pony up another \$300 million under Soria's bill.

Transactions Overview

Select M&A Transactions from 05/04/2026 to 05/10/2026

Date	Target	Buyer/Investor	Description	Status	Healthcare Vertical
05/07/2026	Halo Privacy	Cycurion (NAS: CYCU)	Developer of digital privacy software that protects sensitive information for individuals and enterprises in legal, healthcare, and banking sectors.	Announced	Digital Health
05/06/2026	Cross Country Healthcare (NAS: CCRN)	Knox Lane	Provider of AI-powered healthcare workforce solutions including nursing, allied, and physician staffing services across the United States.	Announced	HS: Staffing
05/06/2026	Avarion	Medical Technology Solutions	Provider of advisory, consulting, and staffing services to healthcare IT investors serving hospitals, health systems, and care networks.	Closed	HCIT: Provider Solutions
05/06/2026	Infuzion Solutions	Western Computer	Provider of ERP consulting and implementation services that optimize business processes across healthcare, education, and distribution.	Closed	HCIT: Consulting
05/05/2026	Optimum Healthcare IT	Infosys (NSE: INFY)	Provider of staffing and consulting services that supply professionals and advisory support to the healthcare industry.	Closed	HCIT: Provider Solutions
05/05/2026	Community Link Consulting	VMG Health	Operator of a specialized consulting firm serving community health centers and FQHCs with compliance, billing audits, RCM, and strategic planning.	Closed	HCIT: Consulting
05/04/2026	Knack RCM	The Carlyle Group (NAS: CG)	Operator of an AI-native, specialty-focused RCM platform operating in complex clinical, financial and technology environments to help providers unlock the full value of reimbursement.	Closed	HCIT: RCM
05/04/2026	EqualizerRCM	The Carlyle Group (NAS: CG)	Provider of RCM services including medical coding, credentialing, claims auditing, billing, and denial management for hospitals, physicians, and clinics.	Closed	HCIT: RCM

Based on publicly available information
The transactions featured in this week's newsletter represent a collection of notable deals, and unless stated otherwise, ambwealth was not involved in these transactions.

AMB at a Glance

AMB focuses on healthcare niches where consumerism and fragmentation meet to disrupt traditional healthcare channels. We are currently most active in the following segments:

Physician Practice Management

Physician Groups (i.e., Urology, Orthopedics, Podiatry), Practice Management Companies, At-Risk Providers

Health and Wellness

Addiction, Behavioral Health, Weight Management, Health and Beauty

Pharma Services

Regulatory, Medical Affairs, CROs, Pharmacovigilance, Marketing and Communications, Education, Contract development, Bioanalytics

Multisite Healthcare

Urgent Care, Primary Care Providers (PCP), Dental Support Organizations, Vision Services, Dermatology, and Related Retail Operators

Population Health

At-Risk Providers, Managed Care, Chronic Care Management, Social Determinants

HCIT

EMR & Practice Management, Revenue Cycle Management, Telehealth

Animal Health

Veterinary Services, Technology

Radiology

Physician Groups, Imaging Centers, Technology

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