



Case Study : Analysis of large number of patents in a portfolio

Many a times we have been asked to analyze a portfolio consisting of hundreds and thousands of patents. Such a requirement can arise from any one of the following situations –

1. An investor ascertaining the valuation of a patent portfolio
2. Asset portfolio holders to determine a fair value of their portfolio
3. A company trying to determine if their products or services potentially read on a patent portfolio
4. Asset portfolio holders finding potential reads on an potentially infringing company's products and services

A detailed analysis of all assets would prove to be cost prohibitive. A cost effective way for such an analysis is carried out in the following three steps –

1. Ranking of each asset – We read the claims of each asset, do some basic research and rank the patent. A short comment (10 to 15 words) is also added for each patent. This exercise is normally completed in less than 15 minutes per asset.
2. Analysis of the high ranked assets – The high ranked assets from the above rankings are analyzed further to provide details on the claim quality, identify the potential reads if any, the technology coverage, validity concerns if any, future application of the technology etc. This exercise normally takes about two hours per analyzed asset.
3. Claim charts for shortlisted patents – The analysis in step 2, provides a listing of short-listed, high valued assets. Claim charts on identified potential reads are now prepared for these short listed patents. This exercise takes about eight hours per claim chart.

The above step by step exercise helps in reducing the cost for the exercise by over 80% with a high probability of accuracy.

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