Eva Live Inc.

GOAI

Nasdaq; business equipment; SIC 7370, Services-Computer Programming, Data Processing, Etc.; CIK 0001983736

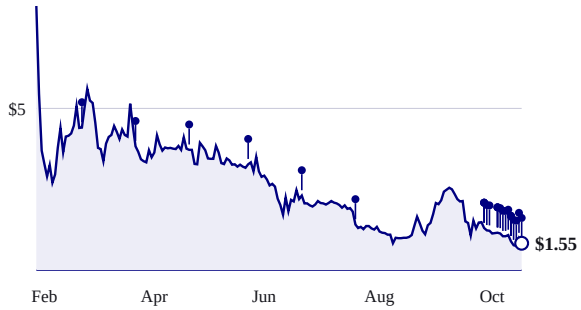
None

No letter

3 of 14 inputs computable; 7 are required, with a score in every sleeve

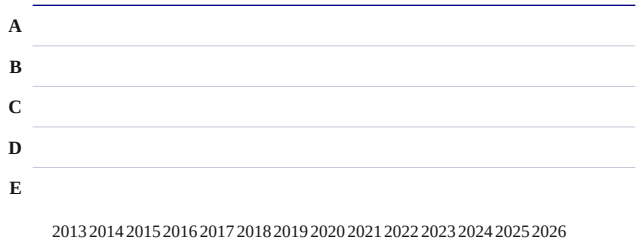
Scoreboard	
Reliability	0.83 AUC filers with $12.5M to $120M assets; 95% interval 0.79 to 0.86; 201 events, 2020 to 2025
Peer failure rate	1.07% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$12.5M to $120M assets total assets $16.3M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	short runway, late filer, thin data not computable: dilution, distress, fortress balance sheet
Inputs computable	3 of 14
Graded from	filings received through Mar 16, 2026 217 days before the rescan; latest periodic filing 10-Q received Aug 3, 2026
Last close	$1.58 2026-10-16; market equity $62.0M; no price enters the letter

Share price, twelve months to the rescan



Split-adjusted close. Each lollipop is a rescan and carries the letter held then.

Letter at every rescan, 2012 to 2026



Sector percentile at each rescan, stronger toward the top; facts filed by each date only.

Business, in the company's words

opening of Item 1 of the 10-K received Mar 16, 2026

Live Inc. (the "Company") was incorporated under the laws of the State of Nevada on August 27, 2002, as International Pit Boss Gaming, Inc. On October 1, 2002, the Company merged with Pro Roads Systems, Inc. (a Florida corporation), a public shell company traded on the Pink Sheets. Pro Roads Systems, Inc. had no operations before the merger. The purpose of the merger was to change the Company's domicile from Florida to Nevada. From its inception to 2006, the Company designed and developed software for the gaming industry. The Company changed its name on February 14, 2006, to Logo Industries Corporation and, on November 18, 2008, to Malwin Ventures Inc.

The fourteen inputs

lower percentile is stronger; sleeves and inputs within a sleeve carry equal weight

Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 99.7						
Gross profitability	not computable	28.6%				
one or more required annual facts are missing						

Return on invested capital	not computable	11.0%			
one or more required annual facts are missing					
Accruals ratio	84.0%	(7.4%)	99.7	620	2025-12-31
Gross margin stability, five years	not computable	2.3 pts			
five annual gross margins are required; found 0					
Solvency, sleeve percentile 31.9					
Twelve-month failure probability	not computable	0.05%			
market price is missing at 2025-12-31					
Altman Z double-prime	4.75	2.16	24.5	564	2025-12-31
Net debt to EBITDA	not computable	1.11x			
one or more required annual facts are missing					
Interest coverage	not computable	3.77x			
one or more required annual facts are missing					
Current ratio	2.46x	2.01x	39.2	664	2025-12-31
Growth and financing					
Revenue growth, three-year compound	not computable	6.4%			
four annual observations are required; found 3					
Free cash flow growth, three-year compound	not computable	17.7%			
four consecutive annual FCF observations are required; found 2					
Reinvestment rate	not computable	13.5%			
one or more required annual facts are missing					
Asset growth, three years	not computable	5.0%			
four annual observations are required; found 3					
Net share issuance, one year	not computable	0.5%			
raw and split-adjusted prices do not align at 2025-05-15					

Warnings

3 of 7 checks triggered; none of them enters the letter

Check	Measured
Short runway	cash runway is 4.0 months
Late filer	found 2 NT 10-K/Q filings in the last eight quarters
Thin data	3 of 14 grade factors are computable; minimum is 7

What the price implies

at the 2026-10-16 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	not computable	2.2%	
Distance from 52-week high	(79.7%)	(33.4%)	7
EBIT to enterprise value	13.8%	1.5%	97
Free cash flow yield	(0.8%)	2.9%	23
Book value to price	0.28	0.26	54
Sales to price	0.28	0.32	47
Composite equity issuance, five years	not computable	4.2%	
Relative strength against the sector, log excess return	not computable	(0.26)	

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score None of 9, period end 2025-12-31	
Return on assets above zero	pass
Operating cash flow above zero	fail
Return on assets improved	pass

Not investment advice. Informational and educational only. Data from SEC EDGAR, may contain errors, is not warranted. The grade ranks reported financial condition and is not a return forecast.

Operating cash flow exceeds net income	fail
Long-term leverage fell	fail
Current ratio improved	pass
No new shares issued	fail
Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$1.8M
Operating cash flow, four quarters	-$5.5M
Months of runway	4.0
Days since last periodic filing	77 (10-Q received Aug 3, 2026)
Median daily dollar volume, 63 sessions	$225,117

Sources

every fact behind the inputs; each row links to its filing index on sec.gov

#	Concept	XBRL tag	Value	Period end	Received	Form	Accession
1	net income	us-gaap:NetIncomeLoss	$8.1M	2025-12-31	2026-03-16	10-K	26-010305
2	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$448,960	2025-12-31	2026-03-16	10-K	26-010305
3	assets	us-gaap:Assets	$16.3M	2025-12-31	2026-03-16	10-K	26-010305
4	assets	us-gaap:Assets	$4.1M	2024-12-31	2026-03-16	10-K	26-010305
5	current assets	us-gaap:AssetsCurrent	$16.3M	2025-12-31	2026-03-16	10-K	26-010305
6	current liabilities	us-gaap:LiabilitiesCurrent	$6.6M	2025-12-31	2026-03-16	10-K	26-010305
7	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$20.3M	2025-12-31	2026-03-16	10-K	26-010305
8	operating income	us-gaap:OperatingIncomeLoss	$8.2M	2025-12-31	2026-03-16	10-K	26-010305
9	book equity	us-gaap:StockholdersEquity	$9.7M	2025-12-31	2026-03-16	10-K	26-010305
10	liabilities	us-gaap:Liabilities	$6.6M	2025-12-31	2026-03-16	10-K	26-010305
11	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$17.0M	2025-12-31	2026-03-16	10-K	26-010305
12	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$9.3M	2024-12-31	2026-03-16	10-K	26-010305
13	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$5.1M	2023-12-31	2025-05-15	10-K/A	25-011063
14	assets	us-gaap:Assets	$1.5M	2023-12-31	2025-05-15	10-K/A	25-011063
15	shares outstanding	dei:EntityCommonStockSharesOutstanding	31,485,389	2026-03-16	2026-03-16	10-K	26-010305
16	shares outstanding	dei:EntityCommonStockSharesOutstanding	31,342,285	2025-05-15	2025-05-15	10-K/A	25-011063

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