Fitlife Brands, Inc.

FTLF

Nasdaq; healthcare; SIC 2833, Medicinal Chemicals & Botanical Products; CIK 0001374328

B

second fifth of 370 graded peers in healthcare

rank 131 of 370; percentile 35.2; sampling error 2.5 points; lower is stronger

A B C D E

B, the elk



Scoreboard	
Profitability	C percentile 55.3
Solvency	C percentile 53.5
Growth and financing	A/B percentile 21.5
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 $106.3M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: dilution, short runway, distress, fortress balance sheet
Inputs computable	8 of 14
Graded from	filings received through Apr 21, 2026 185 days before the rescan; latest periodic filing 10-Q received Aug 13, 2026
Last close	$8.36 2026-10-22; market equity $78.5M; 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 31, 2026

FitLife Brands, Inc. (the "Company") is a provider of innovative and proprietary nutritional supplements and wellness products for health-conscious consumers marketed under the following brand names: (i) NDS Nutrition, PMD Sports, SirenLabs, Core Active, Nutrology, and Metis Nutrition (together, the "NDS Products"); (ii) iSatori, BioGenetic Laboratories, and Energize (together, the "iSatori Products"); (iii) Dr. Tobias, All Natural Advice, and Maritime Naturals (together, the "MRC Products"); (iv) MusclePharm; and (v) Irwin Naturals, Applied Nutrition, and Nature's Secret (together, the "Irwin Products").

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 55.3						
Gross profitability	29.6%	32.3%		50.5	371	2025-12-31
Return on invested capital	not computable	9.3%				

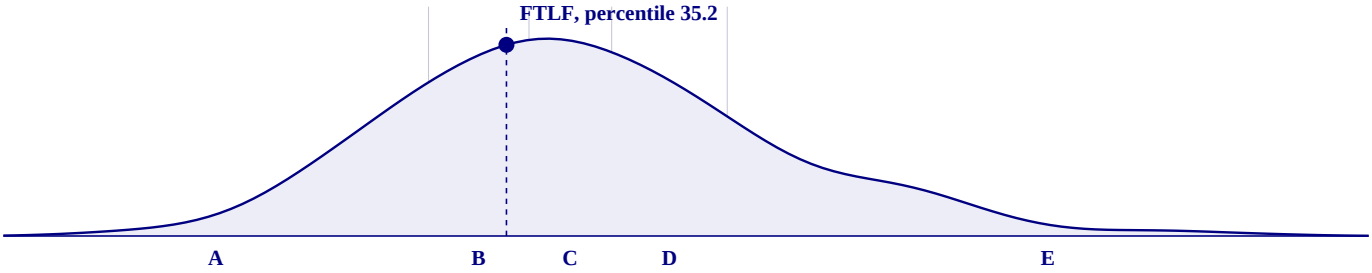
required facts have no common fiscal period end

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Accruals ratio	(1.4%)	(6.6%)		78.1	812	2025-12-31
Gross margin stability, five years	2.2 pts	2.8 pts		37.3	242	2025-12-31
Solvency, sleeve percentile 53.5						
Twelve-month failure probability	not computable	0.06%				
latest liabilities, cash plus short-term investments, book equity, and shares are required						
Altman Z double-prime	2.44	(0.30)		26.9	757	2025-12-31
Net debt to EBITDA	not computable	1.82x				
required facts have no common fiscal period end						
Interest coverage	not computable	(4.51x)				
latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31						
Current ratio	1.53x	2.96x		80.1	840	2025-12-31
Growth and financing, sleeve percentile 21.5						
Revenue growth, three-year compound	41.4%	10.1%		16.0	414	2025-12-31
Free cash flow growth, three-year compound	not computable	10.9%				
four consecutive annual FCF observations are required; found 9						
Reinvestment rate	54.9%	37.1%		42.7	104	2025-12-31
Asset growth, three years	60.5%	2.1%		5.8	705	2025-12-31
Net share issuance, one year	not computable	2.4%				
prior share count is 27 days earlier						

Among 370 peers

healthcare; letters are fifths of this list



Composite score of every graded peer, smoothed; vertical rules are the letter band edges; stronger to the left.

Rank	Company	Percentile	Letter	Warnings
126	Apyx Medical Corp. (APYX)	33.9	B	
127	Tandem Diabetes Care Inc. (TNDM)	34.1	B	
128	BrightSpring Health Services, Inc. (BTSG)	34.6	B	
129	BrightSpring Health Services, Inc. (BTSGU)	34.6	B	
130	Insmed Inc. (INSM)	35.0	B	
131	Fitlife Brands, Inc. (FTLF)	35.2	B	
132	Glaukos Corp. (GKOS)	35.5	B	fortress balance sheet
133	Biocryst Pharmaceuticals Inc. (BCRX)	35.8	B	fortress balance sheet
134	Establishment Labs Holdings Inc. (ESTA)	36.0	B	fortress balance sheet
135	Tenet Healthcare Corp. (THC)	36.3	B	
136	Ionis Pharmaceuticals Inc. (IONS)	36.6	B	

What the price implies

at the 2026-10-22 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(49.5%)	8.0%	14
Distance from 52-week high	(58.6%)	(29.6%)	20
EBIT to enterprise value	8.7%	(1.5%)	90
Free cash flow yield	9.6%	(0.9%)	91

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Book value to price	0.61	0.27	75
Sales to price	1.05	0.30	84
Composite equity issuance, five years	not computable	20.5%	
Relative strength against the sector, log excess return	(0.89)	(0.13)	14

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	pass
Return on assets improved	fail
Operating cash flow exceeds net income	pass
Long-term leverage fell	fail
Current ratio improved	fail
No new shares issued	fail
Gross margin improved	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	n/a
Operating cash flow, four quarters	n/a
Months of runway	not finite
Days since last periodic filing	71 (10-Q received Aug 13, 2026)
Median daily dollar volume, 63 sessions	$103,825

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	gross profit	us-gaap:GrossProfit	$31.5M	2025-12-31	2026-03-31	10-K	26-010680
2	assets	us-gaap:Assets	$106.3M	2025-12-31	2026-03-31	10-K	26-010680
3	net income	us-gaap:NetIncomeLoss	$6.3M	2025-12-31	2026-03-31	10-K	26-010680
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$7.4M	2025-12-31	2026-03-31	10-K	26-010680
5	assets	us-gaap:Assets	$58.5M	2024-12-31	2026-03-31	10-K	26-010680
6	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$81.5M	2025-12-31	2026-03-31	10-K	26-010680
7	gross profit	us-gaap:GrossProfit	$28.1M	2024-12-31	2026-03-31	10-K	26-010680
8	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$64.5M	2024-12-31	2026-03-31	10-K	26-010680
9	gross profit	us-gaap:GrossProfit	$21.4M	2023-12-31	2025-03-27	10-K	25-009469
10	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$52.7M	2023-12-31	2025-03-27	10-K	25-009469
11	gross profit	us-gaap:GrossProfit	$12.0M	2022-12-31	2024-03-29	10-K	24-010119
12	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$28.8M	2022-12-31	2024-03-29	10-K	24-010119
13	gross profit	us-gaap:GrossProfit	$12.5M	2021-12-31	2023-03-24	10-K	23-007858
14	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$27.9M	2021-12-31	2023-03-24	10-K	23-007858
15	current assets	us-gaap:AssetsCurrent	$33.1M	2025-12-31	2026-03-31	10-K	26-010680
16	current liabilities	us-gaap:LiabilitiesCurrent	$21.6M	2025-12-31	2026-03-31	10-K	26-010680
17	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$11.9M	2025-12-31	2026-03-31	10-K	26-010680
18	operating income	us-gaap:OperatingIncomeLoss	$10.1M	2025-12-31	2026-03-31	10-K	26-010680
19	book equity	us-gaap:StockholdersEquity	$43.6M	2025-12-31	2026-03-31	10-K	26-010680
20	liabilities	us-gaap:Liabilities	$62.7M	2025-12-31	2026-03-31	10-K	26-010680
21	operating income	us-gaap:OperatingIncomeLoss	$7.5M	2023-12-31	2025-03-27	10-K	25-009469
22	interest expense	us-gaap:InterestExpense	$1.0M	2023-12-31	2024-03-29	10-K	24-010119
23	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$42,000	2025-12-31	2026-03-31	10-K	26-010680
24	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$420,000	2025-12-31	2026-03-31	10-K	26-010680
25	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$8.2M	2025-12-31	2026-03-31	10-K	26-010680
26	income tax	us-gaap:IncomeTaxExpenseBenefit	$1.9M	2025-12-31	2026-03-31	10-K	26-010680

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27	current assets	us-gaap:AssetsCurrent	$18.1M	2024-12-31	2026-03-31	10-K	26-010680
28	current liabilities	us-gaap:LiabilitiesCurrent	$11.3M	2024-12-31	2026-03-31	10-K	26-010680
29	assets	us-gaap:Assets	$55.3M	2023-12-31	2025-03-27	10-K	25-009469
30	assets	us-gaap:Assets	$25.7M	2022-12-31	2024-03-29	10-K	24-010119
31	shares outstanding	dei:EntityCommonStockSharesOutstanding	9,391,072	2026-04-23	2026-04-21	10-K/A	26-012937
32	shares outstanding	dei:EntityCommonStockSharesOutstanding	9,391,072	2026-03-27	2026-03-31	10-K	26-010680

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