Rythm, Inc.

RYM

Nasdaq; consumer nondurables; SIC 700, Agricultural Services; CIK 0001800637

E

weakest fifth of 124 graded peers in consumer nondurables

rank 116 of 124; percentile 93.5; sampling error 3.8 points; lower is stronger

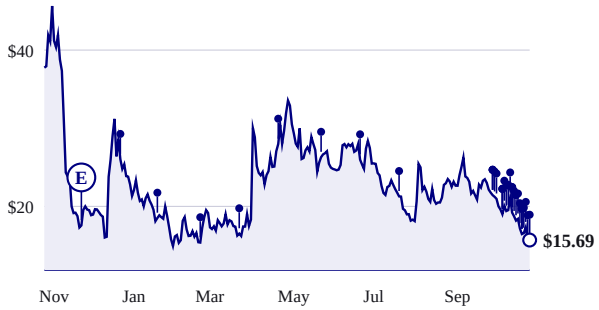
A B C D E

E, the bear



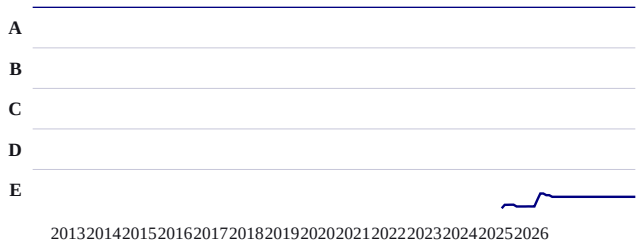
Scoreboard	
Profitability	C percentile 55.2
Solvency	D/E percentile 82.1
Growth and financing	D percentile 65.0
Reliability	0.83 AUC filers with $12.5M to $120M assets; 95% interval 0.79 to 0.86; 201 events, 2020 to 2025
Peer failure rate	1.07% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$12.5M to $120M assets total assets $106.7M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress
Inputs computable	8 of 14
Graded from	filings received through Mar 3, 2026 237 days before the rescan; latest periodic filing 10-Q received Aug 4, 2026
Last close	$17.26 2026-10-21; market equity $37.6M; 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 3, 2026

Unless otherwise stated or the context otherwise requires, references in this report to "RYTHM", the "Company," "we," "us," "our," or similar references mean RYTHM, Inc. and its subsidiaries on a consolidated basis. Corporation) (together with its subsidiaries, the "Company" or "RYTHM") delivers well-being to consumers through its portfolio of hemp-derived tetrahydrocannabinol ("hemp-derived THC") products and iconic licensed brands. The Company's portfolio of consumer-packaged goods brands includes RYTHM, incredibles, Dogwalkers, Beboe, &Shine, Doctor Solomon's, Good Green and Señorita.

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 55.2						
Gross profitability	9.6%	29.8%		89.4	142	2025-12-31
Return on invested capital	not computable	5.6%				

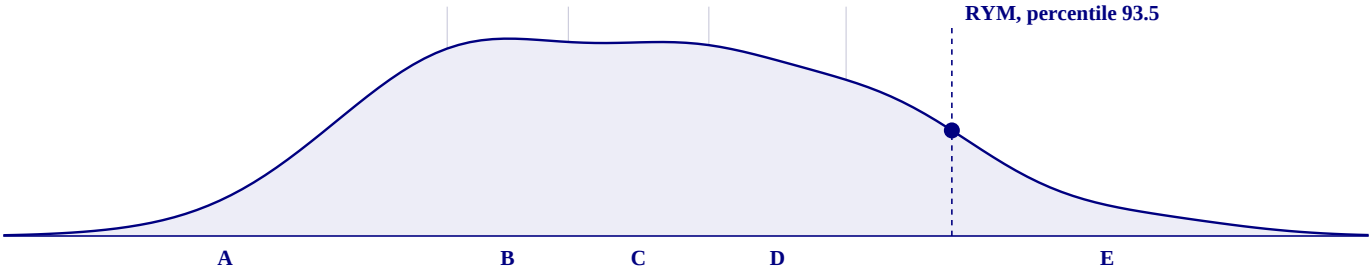
latest aligned inputs end 2024-12-31; latest annual assets end 2025-12-31

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Accruals ratio	(12.1%)	(5.0%)	20.9	149	2025-12-31
Gross margin stability, five years	not computable	1.9 pts			
annual revenue must exceed $100,000					
Solvency, sleeve percentile 82.1					
Twelve-month failure probability	not computable	0.03%			
latest liabilities, cash plus short-term investments, book equity, and shares are required					
Altman Z double-prime	(12.02)	3.11	88.1	119	2025-12-31
Net debt to EBITDA	not computable	2.54x			
EBITDA must exceed $100,000					
Interest coverage	(7.89x)	2.51x	85.7	43	2025-12-31
Current ratio	1.11x	1.81x	72.4	153	2025-12-31
Growth and financing, sleeve percentile 65.0					
Revenue growth, three-year compound	(33.3%)	0.2%	97.0	133	2025-12-31
Free cash flow growth, three-year compound	not computable	14.9%			
current FCF must be positive and base FCF must exceed $100,000					
Reinvestment rate	not computable	10.7%			
NOPAT must exceed $100,000					
Asset growth, three years	15.2%	0.5%	9.8	134	2025-12-31
Net share issuance, one year	10.1%	0.03%	88.2	103	2026-03-03

Among 124 peers

consumer nondurables; 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
111	John Wiley & Sons, Inc. (WLY)	89.8	E	
112	John Wiley & Sons, Inc. (WLYB)	89.8	E	
113	Rocky Mountain Chocolate Factory, Inc. (RMCF)	91.1	E	short runway, late filer, fortress balance sheet
114	Beyond Meat, Inc. (BYND)	91.9	E	dilution, late filer
115	Archer-Daniels-Midland Co. (ADM)	92.7	E	late filer
116	Rythm, Inc. (RYM)	93.5	E	
117	Culp Inc. (CULP)	94.3	E	fortress balance sheet
118	Mondelez International, Inc. (MDLZ)	95.1	E	
119	Hain Celestial Group Inc. (HAIN)	95.9	E	fortress balance sheet
120	Limoneira Co. (LMNR)	96.7	E	
121	Reed'S, Inc. (REED)	97.6	E	

What the price implies

at the 2026-10-21 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(44.8%)	(0.2%)	11
Distance from 52-week high	(65.6%)	(23.0%)	11
EBIT to enterprise value	(44.3%)	3.9%	7

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Free cash flow yield	(33.9%)	4.6%	5
Book value to price	1.14	0.57	77
Sales to price	0.51	1.21	19
Composite equity issuance, five years	not computable	(16.3%)	
Relative strength against the sector, log excess return	(0.69)	(0.10)	11

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	fail
Operating cash flow above zero	fail
Return on assets improved	pass
Operating cash flow exceeds net income	pass
Long-term leverage fell	pass
Current ratio improved	fail
No new shares issued	fail
Gross margin improved	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$41.9M
Operating cash flow, four quarters	$1.3M
Months of runway	not finite
Days since last periodic filing	83 (10-Q received Aug 4, 2026)
Median daily dollar volume, 63 sessions	$218,150

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	$10.2M	2025-12-31	2026-03-03	10-K	26-023069
2	assets	us-gaap:Assets	$106.7M	2025-12-31	2026-03-03	10-K	26-023069
3	operating income	us-gaap:OperatingIncomeLoss	-$5.1M	2024-12-31	2026-03-03	10-K	26-023069
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$23.2M	2024-12-31	2026-03-03	10-K	26-023069
5	income tax	us-gaap:IncomeTaxExpenseBenefit	-$2,000	2024-12-31	2026-03-03	10-K	26-023069
6	total debt	us-gaap:LongTermDebt	$10.5M	2024-12-31	2025-03-28	10-K/A	25-003503
7	book equity	us-gaap:StockholdersEquity	$28.1M	2024-12-31	2026-03-03	10-K	26-023069
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$31.2M	2024-12-31	2025-03-28	10-K/A	25-003503
9	total debt	us-gaap:LongTermDebt	$16.0M	2023-12-31	2024-04-15	10-K	24-033048
10	book equity	us-gaap:StockholdersEquity	-$14.7M	2023-12-31	2026-03-03	10-K	26-023069
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$434,000	2023-12-31	2025-03-28	10-K/A	25-003503
12	net income	us-gaap:NetIncomeLoss	-$33.3M	2025-12-31	2026-03-03	10-K	26-023069
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$23.5M	2025-12-31	2026-03-03	10-K	26-023069
14	assets	us-gaap:Assets	$54.0M	2024-12-31	2026-03-03	10-K	26-023069
15	revenue	us-gaap:Revenues	$17.3M	2025-12-31	2026-03-03	10-K	26-023069
16	gross profit	us-gaap:GrossProfit	-$71,000	2024-12-31	2026-03-03	10-K	26-023069
17	revenue	us-gaap:Revenues	$18,000	2024-12-31	2026-03-03	10-K	26-023069
18	current assets	us-gaap:AssetsCurrent	$47.5M	2025-12-31	2026-03-03	10-K	26-023069
19	current liabilities	us-gaap:LiabilitiesCurrent	$43.0M	2025-12-31	2026-03-03	10-K	26-023069
20	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$340.8M	2025-12-31	2026-03-03	10-K	26-023069
21	operating income	us-gaap:OperatingIncomeLoss	-$32.3M	2025-12-31	2026-03-03	10-K	26-023069
22	book equity	us-gaap:StockholdersEquity	$13.0M	2025-12-31	2026-03-03	10-K	26-023069
23	liabilities	us-gaap:Liabilities	$93.7M	2025-12-31	2026-03-03	10-K	26-023069
24	depreciation amortization	us-gaap:Depreciation	$300,000	2024-12-31	2025-03-28	10-K/A	25-003503
25	interest expense	us-gaap:InterestExpense	$4.1M	2025-12-31	2026-03-03	10-K	26-023069

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26	revenue	us-gaap:Revenues	$15.1M	2023-12-31	2025-03-28	10-K/A	25-003503
27	revenue	us-gaap:Revenues	$58.3M	2022-12-31	2024-04-15	10-K	24-033048
28	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$11.6M	2024-12-31	2026-03-03	10-K	26-023069
29	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$4,000	2024-12-31	2026-03-03	10-K	26-023069
30	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$31.0M	2023-12-31	2025-03-28	10-K/A	25-003503
31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$59,000	2023-12-31	2025-03-28	10-K/A	25-003503
32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$72.0M	2022-12-31	2024-04-15	10-K	24-033048
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$8.1M	2022-12-31	2024-04-15	10-K	24-033048
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$30.1M	2021-12-31	2023-11-28	10-K	23-090353
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$2.2M	2021-12-31	2023-11-28	10-K	23-090353
36	current assets	us-gaap:AssetsCurrent	$34.7M	2024-12-31	2026-03-03	10-K	26-023069
37	current liabilities	us-gaap:LiabilitiesCurrent	$24.7M	2024-12-31	2026-03-03	10-K	26-023069
38	current assets	us-gaap:AssetsCurrent	$24.0M	2023-12-31	2025-03-28	10-K/A	25-003503
39	current liabilities	us-gaap:LiabilitiesCurrent	$41.2M	2023-12-31	2025-03-28	10-K/A	25-003503
40	assets	us-gaap:Assets	$45.3M	2023-12-31	2025-03-28	10-K/A	25-003503
41	assets	us-gaap:Assets	$69.7M	2022-12-31	2024-04-15	10-K	24-033048
42	shares outstanding	dei:EntityCommonStockSharesOutstanding	2,149,148	2026-03-03	2026-03-03	10-K	26-023069
43	shares outstanding	dei:EntityCommonStockSharesOutstanding	1,952,032	2025-03-17	2025-03-28	10-K/A	25-003503

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