Usana Health Sciences Inc.

USNA

NYSE; healthcare; SIC 2833, Medicinal Chemicals & Botanical Products; CIK 0000896264

B

second fifth of 370 graded peers in healthcare

rank 118 of 370; percentile 31.7; sampling error 2.5 points; lower is stronger

A B C D E

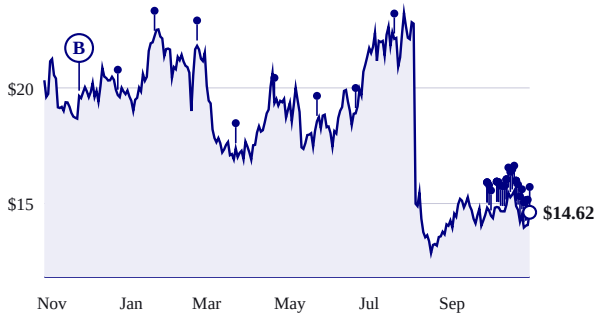
B, the elk



Scoreboard

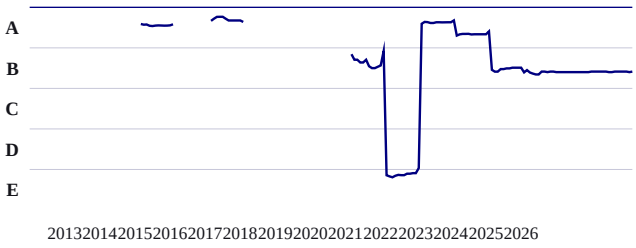
Profitability	B percentile 32.3
Solvency	B/C percentile 40.5
Growth and financing	C percentile 55.7
Reliability	0.91 AUC filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025
Peer failure rate	1.01% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$591M to $2.67B assets total assets $742.9M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress, fortress balance sheet
Inputs computable	10 of 14
Graded from	filings received through Mar 16, 2026 227 days before the rescan; latest periodic filing 10-Q received Aug 13, 2026
Last close	$14.66 2026-10-28; market equity $270.9M; 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

," and Part II, "Item 7. Management's Discussion and Analysis of Financial Condition and Results of Operations" of this report, as well as in the other filings we make from time to time with the SEC, in evaluating us, our business and an investment in our securities. Below is a summary of the principal factors that make an investment in the common stock of the Company risky or speculative. This summary does not address all of the risks we face. Unless otherwise indicated or otherwise required by the context, the terms "we," "our," "it," "its," "Company," and "USANA" refer to USANA Health Sciences, Inc. and its wholly owned subsidiaries.

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 32.3						
Gross profitability	97.5%	32.3%		3.5	369	2026-01-03
Return on invested capital	not computable	9.3%				

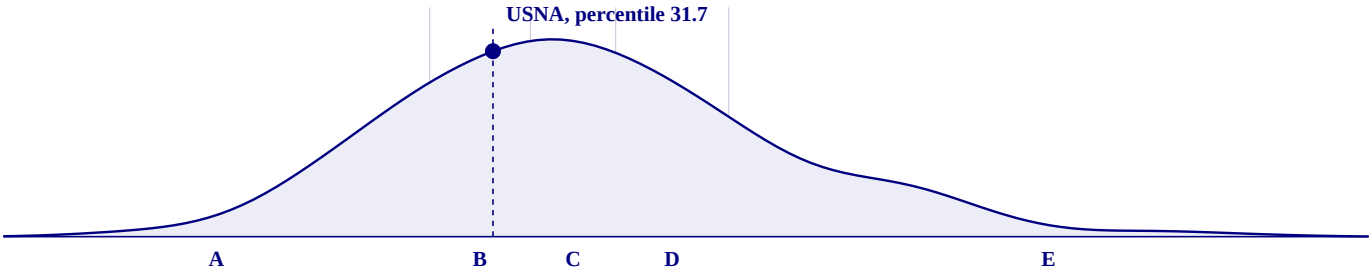
one or more required annual facts are missing

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Accruals ratio	(1.6%)	(6.6%)	77.7	805	2026-01-03
Gross margin stability, five years	1.2 pts	2.8 pts	15.8	242	2026-01-03
Solvency, sleeve percentile 40.5					
Twelve-month failure probability	not computable	0.07%			
latest liabilities, cash plus short-term investments, book equity, and shares are required					
Altman Z double-prime	7.37	(0.33)	13.2	751	2026-01-03
Net debt to EBITDA	not computable	1.82x			
one or more required annual facts are missing					
Interest coverage	not computable	(4.51x)			
latest aligned inputs end 2023-12-30; latest annual assets end 2026-01-03					
Current ratio	2.24x	2.94x	67.9	832	2026-01-03
Growth and financing, sleeve percentile 55.7					
Revenue growth, three-year compound	(2.5%)	10.1%	77.2	413	2026-01-03
Free cash flow growth, three-year compound	(55.0%)	10.9%	97.9	96	2026-01-03
Reinvestment rate	14.9%	37.1%	61.2	104	2026-01-03
Asset growth, three years	7.6%	2.1%	35.8	697	2026-01-03
Net share issuance, one year	(2.4%)	2.5%	6.5	633	2026-03-13

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
113	Steris plc (STE)	30.4	B	
114	BioNexus Gene Lab Corp. (BGLC)	30.6	B	dilution, late filer
115	Arcutis Biotherapeutics, Inc. (ARQT)	30.9	B	
116	Verastem, Inc. (VSTM)	31.2	B	dilution, fortress balance sheet
117	Stryker Corp. (SYK)	31.4	B	
118	Usana Health Sciences Inc. (USNA)	31.7	B	
119	Eton Pharmaceuticals, Inc. (ETON)	32.0	B	
120	CorMedix Inc. (CRMD)	32.2	B	
121	CVRx, Inc. (CVRX)	32.5	B	
122	Koru Medical Systems, Inc. (KRMD)	32.8	B	fortress balance sheet
123	InfuSystem Holdings, Inc. (INFU)	33.1	B	

What the price implies

at the 2026-10-28 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(48.2%)	7.7%	15
Distance from 52-week high	(37.1%)	(27.7%)	37
EBIT to enterprise value	not computable	(1.5%)	
Free cash flow yield	3.2%	(1.0%)	71
Book value to price	1.95	0.27	95
Sales to price	3.43	0.31	96

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Composite equity issuance, five years	(12.1%)	20.5%	14
Relative strength against the sector, log excess return	(0.87)	(0.14)	15

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score None of 9, period end 2026-01-03	
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	pass
No new shares issued	pass
Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$168.6M
Operating cash flow, four quarters	$27.7M
Months of runway	not finite
Days since last periodic filing	77 (10-Q received Aug 13, 2026)
Median daily dollar volume, 63 sessions	$2.8M

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	$724.4M	2026-01-03	2026-03-16	10-K	26-000021
2	assets	us-gaap:Assets	$742.9M	2026-01-03	2026-03-16	10-K	26-000021
3	net income	us-gaap:NetIncomeLoss	$10.8M	2026-01-03	2026-03-16	10-K	26-000021
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$22.3M	2026-01-03	2026-03-16	10-K	26-000021
5	assets	us-gaap:Assets	$748.2M	2024-12-28	2026-03-16	10-K	26-000021
6	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$925.3M	2026-01-03	2026-03-16	10-K	26-000021
7	gross profit	us-gaap:GrossProfit	$693.3M	2024-12-28	2026-03-16	10-K	26-000021
8	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$854.5M	2024-12-28	2026-03-16	10-K	26-000021
9	gross profit	us-gaap:GrossProfit	$744.3M	2023-12-30	2026-03-16	10-K	26-000021
10	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$921.0M	2023-12-30	2026-03-16	10-K	26-000021
11	gross profit	us-gaap:GrossProfit	$804.7M	2022-12-31	2025-03-12	10-K	25-000092
12	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$998.6M	2022-12-31	2025-03-12	10-K	25-000092
13	gross profit	us-gaap:GrossProfit	$968.6M	2022-01-01	2024-02-27	10-K	24-000093
14	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.2B	2022-01-01	2024-02-27	10-K	24-000093
15	current assets	us-gaap:AssetsCurrent	$288.4M	2026-01-03	2026-03-16	10-K	26-000021
16	current liabilities	us-gaap:LiabilitiesCurrent	$128.6M	2026-01-03	2026-03-16	10-K	26-000021
17	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$465.7M	2026-01-03	2026-03-16	10-K	26-000021
18	operating income	us-gaap:OperatingIncomeLoss	$37.4M	2026-01-03	2026-03-16	10-K	26-000021
19	book equity	us-gaap:StockholdersEquity	$533.1M	2026-01-03	2026-03-16	10-K	26-000021
20	liabilities	us-gaap:Liabilities	$156.6M	2026-01-03	2026-03-16	10-K	26-000021
21	operating income	us-gaap:OperatingIncomeLoss	$93.1M	2023-12-30	2026-03-16	10-K	26-000021
22	interest expense	us-gaap:InterestExpense	$262,000	2023-12-30	2024-02-27	10-K	24-000093
23	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$13.8M	2026-01-03	2026-03-16	10-K	26-000021
24	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$61.0M	2024-12-28	2026-03-16	10-K	26-000021
25	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$10.1M	2024-12-28	2026-03-16	10-K	26-000021
26	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$70.6M	2023-12-30	2026-03-16	10-K	26-000021
27	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$14.5M	2023-12-30	2026-03-16	10-K	26-000021
28	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$103.9M	2022-12-31	2025-03-12	10-K	25-000092
29	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$10.4M	2022-12-31	2025-03-12	10-K	25-000092

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30	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$32.6M	2026-01-03	2026-03-16	10-K	26-000021
31	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$41.5M	2026-01-03	2026-03-16	10-K	26-000021
32	income tax	us-gaap:IncomeTaxExpenseBenefit	$30.1M	2026-01-03	2026-03-16	10-K	26-000021
33	current assets	us-gaap:AssetsCurrent	$279.2M	2024-12-28	2026-03-16	10-K	26-000021
34	current liabilities	us-gaap:LiabilitiesCurrent	$139.6M	2024-12-28	2026-03-16	10-K	26-000021
35	assets	us-gaap:Assets	$632.8M	2023-12-30	2025-03-12	10-K	25-000092
36	assets	us-gaap:Assets	$596.5M	2022-12-31	2024-02-27	10-K	24-000093
37	shares outstanding	dei:EntityCommonStockSharesOutstanding	18,456,935	2026-03-13	2026-03-16	10-K	26-000021
38	shares outstanding	dei:EntityCommonStockSharesOutstanding	18,904,526	2025-03-07	2025-03-12	10-K	25-000092

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