# authID Inc.

**AUID**

Nasdaq; business equipment; SIC 7372, Services-Prepackaged Software; CIK 0001534154

# None

**No letter**

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

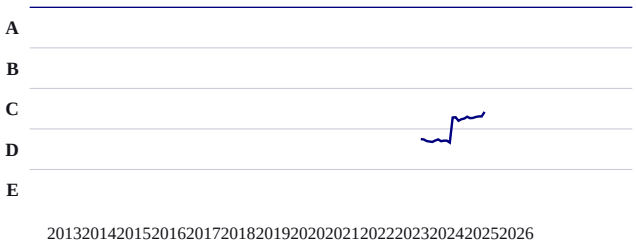
| Scoreboard | |
|---|---|
| **Reliability** | 0.76 AUC<br>filers with under $12.5M assets; 95% interval 0.65 to 0.86; 63 events, 2020 to 2025 |
| **Peer failure rate** | 0.60% a year<br>Item 1.03 bankruptcies, same asset band, 2012 to 2025 |
| **Size band** | under $12.5M assets<br>total assets $10.0M |
| **Standard universe** | outside<br>revenue above $1M and assets above $10M |
| **Warnings** | dilution, thin data<br>not computable: short runway, distress |
| **Inputs computable** | 6 of 14 |
| **Graded from** | filings received through Mar 31, 2026<br>214 days before the rescan; latest periodic filing 10-Q received Aug 14, 2026 |
| **Last close** | $0.26<br>2026-10-30; market equity $4.3M; 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*

Who's Behind the Device"TM for every customer or employee login and transaction, through its easy-to-integrate, patented, biometric identity platform. authID powers biometric identity proofing, biometric authentication, and account recovery with a fast, accurate, user-friendly experience. With our PrivacyKey? solution, authID provides highly accurate biometric authentication while storing no biometric data.

## 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 15.3** | | | | | | |
| Gross profitability | not computable | 28.7% | | | | |
| *latest aligned inputs end 2019-12-31; latest annual assets end 2025-12-31* | | | | | | |
| Return on invested capital | not computable | 11.4% | | | | |
| *pretax income must exceed the validity floor and imply a 0%-100% tax rate* | | | | | | |

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| | | | | | |
|---|---|---|---|---|---|
| Accruals ratio | (24.1%) | (7.3%) | 15.3 | 617 | 2025-12-31 |
| Gross margin stability, five years | not computable | 2.3 pts | | | |
| *five annual gross margins are required; found 2* | | | | | |
| **Solvency, sleeve percentile 59.8** | | | | | |
| Twelve-month failure probability | not computable | 0.05% | | | |
| *latest liabilities, cash plus short-term investments, book equity, and shares are required* | | | | | |
| Altman Z double-prime | (65.35) | 2.15 | 97.7 | 564 | 2025-12-31 |
| Net debt to EBITDA | not computable | 1.09x | | | |
| *EBITDA must exceed $100,000* | | | | | |
| Interest coverage | not computable | 3.77x | | | |
| *latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31* | | | | | |
| Current ratio | 4.16x | 2.01x | 22.0 | 661 | 2025-12-31 |
| **Growth and financing, sleeve percentile 51.1** | | | | | |
| Revenue growth, three-year compound | 57.0% | 6.4% | 5.1 | 534 | 2025-12-31 |
| Free cash flow growth, three-year compound | not computable | 18.1% | | | |
| *four consecutive annual FCF observations are required; found 7* | | | | | |
| Reinvestment rate | not computable | 13.5% | | | |
| *pretax income must exceed the validity floor and imply a 0%-100% tax rate* | | | | | |
| Asset growth, three years | 2.1% | 5.1% | 55.7 | 559 | 2025-12-31 |
| Net share issuance, one year | 47.7% | 0.5% | 92.4 | 408 | 2026-03-25 |

## Warnings

*2 of 7 checks triggered; none of them enters the letter*

| Check | Measured |
|---|---|
| Dilution | split-adjusted year-over-year share growth is 47.7% |
| Thin data | 6 of 14 grade factors are computable; minimum is 7 |

## What the price implies

*at the 2026-10-30 close; none of these enters the grade*

| Measure | Value | Peer median | Percentile |
|---|---|---|---|
| Twelve-month price change, skipping the latest month | (85.9%) | 2.2% | 2 |
| Distance from 52-week high | (90.5%) | (32.4%) | 3 |
| EBIT to enterprise value | (2,034.6%) | 1.6% | 0 |
| Free cash flow yield | (200.6%) | 2.8% | 3 |
| Book value to price | 0.46 | 0.27 | 70 |
| Sales to price | 0.46 | 0.31 | 61 |
| Composite equity issuance, five years | not computable | 4.3% | |
| Relative strength against the sector, log excess return | (2.24) | (0.26) | 2 |

## 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 | fail |
| Operating cash flow exceeds net income | pass |
| Long-term leverage fell | fail |
| Current ratio improved | pass |
| No new shares issued | fail |
| Gross margin improved | fail |
| Asset turnover improved | pass |

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| 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 | 78 (10-Q received Aug 14, 2026) |
| Median daily dollar volume, 63 sessions | $101,614 |

## 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 | revenue | us-gaap:Revenues | $2.6M | 2019-12-31 | 2021-03-08 | 10-K | 21-013989 |
| 2 | cost of revenue | us-gaap:CostOfRevenue | $669,523 | 2019-12-31 | 2020-03-30 | 10-K | 20-007957 |
| 3 | assets | us-gaap:Assets | $13.5M | 2019-12-31 | 2021-03-08 | 10-K | 21-013989 |
| 4 | operating income | us-gaap:OperatingIncomeLoss | -$10.1M | 2019-12-31 | 2021-03-08 | 10-K | 21-013989 |
| 5 | pretax income | us-gaap:IncomeLossFromContinuingOperationsBeforeInc... | -$10.4M | 2019-12-31 | 2021-03-08 | 10-K | 21-013989 |
| 6 | income tax | us-gaap:IncomeTaxExpenseBenefit | $62,931 | 2019-12-31 | 2021-03-08 | 10-K | 21-013989 |
| 7 | total debt | us-gaap:LongTermDebt | $2.0M | 2019-12-31 | 2020-03-30 | 10-K | 20-007957 |
| 8 | book equity | us-gaap:StockholdersEquity | $8.3M | 2019-12-31 | 2022-03-22 | 10-K | 22-014214 |
| 9 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $567,081 | 2019-12-31 | 2021-03-08 | 10-K | 21-013989 |
| 10 | total debt | us-gaap:LongTermDebt | $2.0M | 2018-12-31 | 2019-03-08 | 10-K | 19-003800 |
| 11 | book equity | us-gaap:StockholdersEquity | $14.6M | 2018-12-31 | 2021-03-08 | 10-K | 21-013989 |
| 12 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $5.0M | 2018-12-31 | 2021-03-08 | 10-K | 21-013989 |
| 13 | net income | us-gaap:NetIncomeLoss | -$17.9M | 2025-12-31 | 2026-03-31 | 10-K | 26-037459 |
| 14 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | -$15.0M | 2025-12-31 | 2026-03-31 | 10-K | 26-037459 |
| 15 | assets | us-gaap:Assets | $10.0M | 2025-12-31 | 2026-03-31 | 10-K | 26-037459 |
| 16 | assets | us-gaap:Assets | $14.5M | 2024-12-31 | 2026-03-31 | 10-K | 26-037459 |
| 17 | current assets | us-gaap:AssetsCurrent | $5.7M | 2025-12-31 | 2026-03-31 | 10-K | 26-037459 |
| 18 | current liabilities | us-gaap:LiabilitiesCurrent | $1.4M | 2025-12-31 | 2026-03-31 | 10-K | 26-037459 |
| 19 | retained earnings | us-gaap:RetainedEarningsAccumulatedDeficit | -$191.7M | 2025-12-31 | 2026-03-31 | 10-K | 26-037459 |
| 20 | operating income | us-gaap:OperatingIncomeLoss | -$18.2M | 2025-12-31 | 2026-03-31 | 10-K | 26-037459 |
| 21 | book equity | us-gaap:StockholdersEquity | $8.6M | 2025-12-31 | 2026-03-31 | 10-K | 26-037459 |
| 22 | liabilities | us-gaap:Liabilities | $1.4M | 2025-12-31 | 2026-03-31 | 10-K | 26-037459 |
| 23 | depreciation amortization | us-gaap:DepreciationDepletionAndAmortization | $790,367 | 2019-12-31 | 2021-03-08 | 10-K | 21-013989 |
| 24 | operating income | us-gaap:OperatingIncomeLoss | -$10.7M | 2023-12-31 | 2025-03-13 | 10-K | 25-023697 |
| 25 | interest expense | us-gaap:InterestExpense | $1.1M | 2023-12-31 | 2024-03-20 | 10-K | 24-024363 |
| 26 | revenue | us-gaap:Revenues | $2.0M | 2025-12-31 | 2026-03-31 | 10-K | 26-037459 |
| 27 | revenue | us-gaap:Revenues | $886,485 | 2024-12-31 | 2026-03-31 | 10-K | 26-037459 |
| 28 | revenue | us-gaap:Revenues | $190,289 | 2023-12-31 | 2025-03-13 | 10-K | 25-023697 |
| 29 | revenue | us-gaap:Revenues | $527,415 | 2022-12-31 | 2024-03-20 | 10-K | 24-024363 |
| 30 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $90,036 | 2021-12-31 | 2022-03-22 | 10-K | 22-014214 |
| 31 | depreciation amortization | us-gaap:DepreciationDepletionAndAmortization | $1.2M | 2021-12-31 | 2023-03-30 | 10-K | 23-024677 |
| 32 | operating income | us-gaap:OperatingIncomeLoss | -$17.1M | 2021-12-31 | 2023-03-30 | 10-K | 23-024677 |
| 33 | pretax income | us-gaap:IncomeLossFromContinuingOperationsBeforeInc... | -$16.7M | 2021-12-31 | 2023-03-30 | 10-K | 23-024677 |
| 34 | income tax | us-gaap:IncomeTaxExpenseBenefit | $10,746 | 2021-12-31 | 2023-03-30 | 10-K | 23-024677 |
| 35 | current assets | us-gaap:AssetsCurrent | $6.9M | 2021-12-31 | 2023-03-30 | 10-K | 23-024677 |
| 36 | current liabilities | us-gaap:LiabilitiesCurrent | $2.9M | 2021-12-31 | 2023-03-30 | 10-K | 23-024677 |
| 37 | current assets | us-gaap:AssetsCurrent | $4.4M | 2020-12-31 | 2022-03-22 | 10-K | 22-014214 |
| 38 | current liabilities | us-gaap:LiabilitiesCurrent | $2.9M | 2020-12-31 | 2022-03-22 | 10-K | 22-014214 |
| 39 | assets | us-gaap:Assets | $15.4M | 2023-12-31 | 2025-03-13 | 10-K | 25-023697 |
| 40 | assets | us-gaap:Assets | $9.4M | 2022-12-31 | 2024-03-20 | 10-K | 24-024363 |
| 41 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 16,132,487 | 2026-03-25 | 2026-03-31 | 10-K | 26-037459 |
| 42 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 10,920,909 | 2025-03-10 | 2025-03-13 | 10-K | 25-023697 |

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