Beasley Broadcast Group Inc.

BBGI

Nasdaq; telecom; SIC 4832, Radio Broadcasting Stations; CIK 0001099160

None

No letter

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

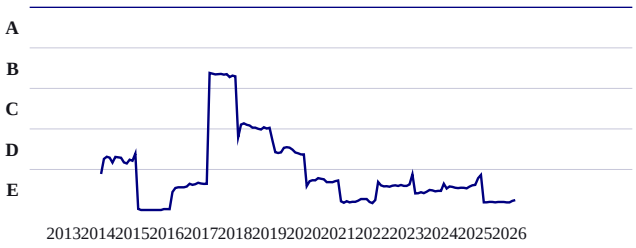
Scoreboard	
Reliability	0.87 AUC filers with $120M to $591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025
Peer failure rate	1.03% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$120M to $591M assets total assets $299.3M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	short runway, late filer, thin data not computable: dilution, distress
Inputs computable	6 of 14
Graded from	filings received through Apr 8, 2026 210 days before the rescan; latest periodic filing 10-Q received Aug 14, 2026
Last close	$6.10 2026-10-30; market equity $0; 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 Apr 8, 2026

We are a multi-platform media company whose primary business is operating radio stations throughout the United States. We offer local and national advertisers integrated marketing solutions across audio, digital and event platforms. We own and operate stations in the following markets: Augusta, GA, Boston, MA, Charlotte, NC, Detroit, MI, Fayetteville, NC, Fort Myers-Naples, FL, Las Vegas, NV, Middlesex, NJ, Monmouth, NJ, Morristown, NJ, Philadelphia, PA, and Tampa-Saint Petersburg, FL. We refer to each group of stations in each market as a market cluster. Beasley Broadcast Group, Inc., a Delaware corporation, was formed in 1999.

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 6.9						
Gross profitability	not computable	28.3%				
one or more required annual facts are missing						
Return on invested capital	not computable	8.9%				

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latest aligned inputs end 2024-12-31; latest annual assets end 2025-12-31						
Accruals ratio	(44.3%)	(7.3%)		6.9	697	2025-12-31
Gross margin stability, five years	not computable	2.3 pts				
five annual gross margins are required; found 0						
Solvency, sleeve percentile 83.1						
Twelve-month failure probability	not computable	0.05%				
liabilities and a nearby cover-page share count are required at 2026-06-30						
Altman Z double-prime	(7.23)	1.93		79.0	620	2025-12-31
Net debt to EBITDA	not computable	1.68x				
latest aligned inputs end 2024-12-31; latest annual assets end 2025-12-31						
Interest coverage	(17.36x)	2.81x		90.5	106	2025-12-31
Current ratio	1.00x	1.95x		79.7	754	2025-12-31
Growth and financing, sleeve percentile 88.1						
Revenue growth, three-year compound	(7.0%)	5.7%		82.0	611	2025-12-31
Free cash flow growth, three-year compound	not computable	15.6%				
current FCF must be positive and base FCF must exceed $100,000						
Reinvestment rate	not computable	15.6%				
NOPAT must exceed $100,000						
Asset growth, three years	(25.2%)	4.0%		94.2	637	2025-12-31
Net share issuance, one year	not computable	0.6%				
two annual share counts are required; found 0						

Warnings

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

Check	Measured
Short runway	cash runway is 3.5 months
Late filer	found 1 NT 10-K/Q filings in the last eight quarters
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	153.0%	(3.1%)	95
Distance from 52-week high	(76.9%)	(32.4%)	9
EBIT to enterprise value	not computable	1.6%	
Free cash flow yield	not computable	2.9%	
Book value to price	not computable	0.28	
Sales to price	not computable	0.33	
Composite equity issuance, five years	not computable	3.6%	
Relative strength against the sector, log excess return	0.95	(0.26)	98

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	fail
No new shares issued	fail

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Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$6.7M
Operating cash flow, four quarters	-$23.3M
Months of runway	3.5
Days since last periodic filing	82 (10-Q received Aug 14, 2026)
Median daily dollar volume, 63 sessions	$453,458

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	operating income	us-gaap:OperatingIncomeLoss	$13.1M	2024-12-31	2026-04-08	10-K	26-147594
2	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$7.3M	2024-12-31	2026-04-08	10-K	26-147594
3	income tax	us-gaap:IncomeTaxExpenseBenefit	-$1.3M	2024-12-31	2026-04-08	10-K	26-147594
4	total debt	us-gaap:LongTermDebt	$247.1M	2024-12-31	2025-03-26	10-K	25-045211
5	book equity	us-gaap:StockholdersEquity	$147.2M	2024-12-31	2026-04-08	10-K	26-147594
6	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$13.8M	2024-12-31	2026-04-08	10-K	26-147594
7	total debt	us-gaap:LongTermDebt	$264.2M	2023-12-31	2025-03-26	10-K	25-045211
8	book equity	us-gaap:StockholdersEquity	$149.0M	2023-12-31	2025-03-26	10-K	25-045211
9	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$26.7M	2023-12-31	2025-03-26	10-K	25-045211
10	net income	us-gaap:NetIncomeLoss	-$196.5M	2025-12-31	2026-04-08	10-K	26-147594
11	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$8.5M	2025-12-31	2026-04-08	10-K	26-147594
12	assets	us-gaap:Assets	$299.3M	2025-12-31	2026-04-08	10-K	26-147594
13	assets	us-gaap:Assets	$549.2M	2024-12-31	2026-04-08	10-K	26-147594
14	current assets	us-gaap:AssetsCurrent	$60.5M	2025-12-31	2026-04-08	10-K	26-147594
15	current liabilities	us-gaap:LiabilitiesCurrent	$60.2M	2025-12-31	2026-04-08	10-K	26-147594
16	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$177.4M	2025-12-31	2026-04-08	10-K	26-147594
17	operating income	us-gaap:OperatingIncomeLoss	-$229.7M	2025-12-31	2026-04-08	10-K	26-147594
18	book equity	us-gaap:StockholdersEquity	-$49.3M	2025-12-31	2026-04-08	10-K	26-147594
19	liabilities	us-gaap:Liabilities	$348.6M	2025-12-31	2026-04-08	10-K	26-147594
20	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$7.0M	2024-12-31	2026-04-08	10-K	26-147594
21	interest expense	us-gaap:InterestExpense	$13.2M	2025-12-31	2026-04-08	10-K	26-147594
22	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$205.9M	2025-12-31	2026-04-08	10-K	26-147594
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$240.3M	2024-12-31	2026-04-08	10-K	26-147594
24	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$247.1M	2023-12-31	2025-03-26	10-K	25-045211
25	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$256.4M	2022-12-31	2024-02-16	10-K	24-016348
26	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$4.8M	2025-12-31	2026-04-08	10-K	26-147594
27	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$3.7M	2024-12-31	2026-04-08	10-K	26-147594
28	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$3.0M	2024-12-31	2026-04-08	10-K	26-147594
29	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$4.7M	2023-12-31	2025-03-26	10-K	25-045211
30	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$4.2M	2023-12-31	2025-03-26	10-K	25-045211
31	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$11.1M	2022-12-31	2024-02-16	10-K	24-016348
32	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$13.4M	2022-12-31	2024-02-16	10-K	24-016348
33	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$6.1M	2025-12-31	2026-04-08	10-K	26-147594
34	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$241.2M	2025-12-31	2026-04-08	10-K	26-147594
35	income tax	us-gaap:IncomeTaxExpenseBenefit	-$44.7M	2025-12-31	2026-04-08	10-K	26-147594
36	current assets	us-gaap:AssetsCurrent	$69.3M	2024-12-31	2026-04-08	10-K	26-147594
37	current liabilities	us-gaap:LiabilitiesCurrent	$53.0M	2024-12-31	2026-04-08	10-K	26-147594
38	assets	us-gaap:Assets	$574.3M	2023-12-31	2025-03-26	10-K	25-045211
39	assets	us-gaap:Assets	$714.9M	2022-12-31	2024-02-16	10-K	24-016348

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