# My Size, Inc.

**MYSZ**

Nasdaq; business equipment; SIC 7372, Services-Prepackaged Software; CIK 0001211805

**E**

**weakest fifth of 497 graded peers in business equipment**

rank 428 of 497; percentile 86.1; sampling error 2.2 points; lower is stronger

A B C D E

**E, the bear**



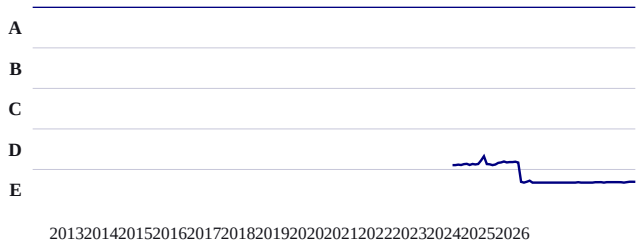
| Scoreboard | |
|---|---|
| **Profitability** | D<br>percentile 65.1 |
| **Solvency** | D<br>percentile 71.5 |
| **Growth and financing** | C<br>percentile 54.6 |
| **Reliability** | 0.76 AUC<br>filers with under $12.5M assets; 95% interval 0.65 to 0.86; 63 events, 2020 to 2025 |
| **Peer failure rate** | 0.60% a year<br>Item 1.03 bankruptcies, same asset band, 2012 to 2025 |
| **Size band** | under $12.5M assets<br>total assets $10.2M |
| **Standard universe** | inside<br>revenue above $1M and assets above $10M |
| **Warnings** | dilution, short runway, late filer<br>not computable: distress, fortress balance sheet |
| **Inputs computable** | 8 of 14 |
| **Graded from** | filings received through Apr 15, 2026<br>203 days before the rescan; latest periodic filing 10-Q received Aug 13, 2026 |
| **Last close** | $0.89<br>2026-11-03; market equity $651,919; 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 15, 2026*

We are a fashion technology company operating an integrated portfolio of businesses designed to address the most pressing challenges facing fashion brands and retailers today-size and fit accuracy, excess inventory management, circular economy solutions, and international market distribution.

## 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 65.1** | | | | | | |
| Gross profitability | 29.4% | 28.7% | | 44.8 | 555 | 2025-12-31 |
| Return on invested capital | not computable | 11.6% | | | | |
| *one or more required annual facts are missing* | | | | | | |
| Accruals ratio | (7.0%) | (7.4%) | | 53.8 | 618 | 2025-12-31 |
| Gross margin stability, five years | 29.0 pts | 2.3 pts | | 96.7 | 426 | 2025-12-31 |

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| | | | | | | |
|---|---|---|---|---|---|---|
| **Solvency, sleeve percentile 71.5** | | | | | | |
| 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 | (22.66) | 2.16 | 89.9 | 564 | 2025-12-31 | |
| Net debt to EBITDA | not computable | 1.08x | | | | |
| *one or more required annual facts are missing* | | | | | | |
| Interest coverage | not computable | 3.77x | | | | |
| *one or more required annual facts are missing* | | | | | | |
| Current ratio | 1.87x | 2.01x | 53.1 | 662 | 2025-12-31 | |
| **Growth and financing, sleeve percentile 54.6** | | | | | | |
| Revenue growth, three-year compound | 28.0% | 6.4% | 11.8 | 536 | 2025-12-31 | |
| Free cash flow growth, three-year compound | not computable | 18.2% | | | | |
| *current FCF must be positive and base FCF must exceed $100,000* | | | | | | |
| Reinvestment rate | not computable | 14.3% | | | | |
| *NOPAT must exceed $100,000* | | | | | | |
| Asset growth, three years | 1.6% | 5.1% | 57.3 | 561 | 2025-12-31 | |
| Net share issuance, one year | 128.3% | 0.5% | 94.6 | 408 | 2026-04-14 | |

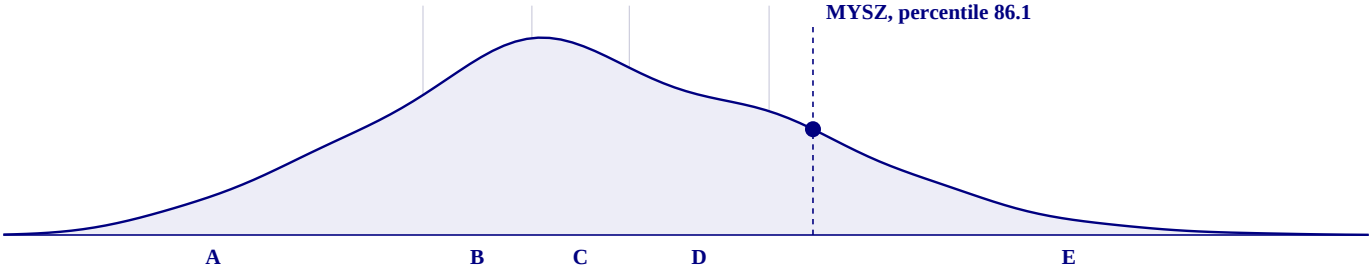
## Warnings

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

| Check | Measured |
|---|---|
| Dilution | split-adjusted year-over-year share growth is 128.3% |
| Short runway | cash runway is 1.1 months |
| Late filer | found 1 NT 10-K/Q filings in the last eight quarters |

## Among 497 peers

*business equipment; 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 |
|---|---|---|---|---|
| 423 | Socket Mobile, Inc. (SCKT) | 85.1 | E | fortress balance sheet |
| 424 | Cerence Inc. (CRNC) | 85.3 | E | |
| 425 | Xperi Inc. (XPER) | 85.5 | E | fortress balance sheet |
| 426 | ONE Stop Systems, Inc. (OSS) | 85.7 | E | short runway |
| 427 | Open Text Corp. (OTEX) | 85.9 | E | |
| 428 | My Size, Inc. (MYSZ) | 86.1 | E | dilution, short runway, late filer |
| 429 | Enphase Energy, Inc. (ENPH) | 86.3 | E | |
| 430 | Beam Global (BEEM) | 86.5 | E | dilution, short runway, late filer |
| 431 | Microvast Holdings, Inc. (MVST) | 86.7 | E | late filer, fortress balance sheet |
| 432 | XTI Aerospace, Inc. (XTIA) | 86.9 | E | dilution, short runway, late filer, fortress balance sheet |
| 433 | Energy Vault Holdings, Inc. (NRGV) | 87.1 | E | late filer |

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## What the price implies

*at the 2026-11-03 close; none of these enters the grade*

| Measure | Value | Peer median | Percentile |
|---|---|---|---|
| Twelve-month price change, skipping the latest month | (82.5%) | (2.0%) | 4 |
| Distance from 52-week high | (90.8%) | (32.7%) | 3 |
| EBIT to enterprise value | not computable | 1.6% | |
| Free cash flow yield | (814.0%) | 2.8% | 0 |
| Book value to price | 3.70 | 0.27 | 97 |
| Sales to price | 14.78 | 0.31 | 98 |
| Composite equity issuance, five years | 456.4% | 4.2% | 98 |
| Relative strength against the sector, log excess return | (2.01) | (0.29) | 4 |

## Diagnostics

*shown on every report; none enters the grade*

| Measure | Value |
|---|---|
| **Piotroski F-score 2 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 |
| Gross margin improved | fail |
| Asset turnover improved | pass |
| **Cash, filings, liquidity** | |
| Cash and equivalents | $453,000 |
| Operating cash flow, four quarters | -$4.9M |
| Months of runway | 1.1 |
| Days since last periodic filing | 83 (10-Q received Aug 13, 2026) |
| Median daily dollar volume, 63 sessions | $84,944 |

## 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 | $3.0M | 2025-12-31 | 2026-04-15 | 10-K | 26-016874 |
| 2 | assets | us-gaap:Assets | $10.2M | 2025-12-31 | 2026-04-15 | 10-K | 26-016874 |
| 3 | net income | us-gaap:NetIncomeLoss | -$5.9M | 2025-12-31 | 2026-04-15 | 10-K | 26-016874 |
| 4 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | -$5.1M | 2025-12-31 | 2026-04-15 | 10-K | 26-016874 |
| 5 | assets | us-gaap:Assets | $10.1M | 2024-12-31 | 2026-04-15 | 10-K | 26-016874 |
| 6 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $9.4M | 2025-12-31 | 2026-04-15 | 10-K | 26-016874 |
| 7 | gross profit | us-gaap:GrossProfit | $3.3M | 2024-12-31 | 2026-04-15 | 10-K | 26-016874 |
| 8 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $8.3M | 2024-12-31 | 2026-04-15 | 10-K | 26-016874 |
| 9 | gross profit | us-gaap:GrossProfit | $2.7M | 2023-12-31 | 2025-03-27 | 10-K | 25-000990 |
| 10 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $7.0M | 2023-12-31 | 2025-03-27 | 10-K | 25-000990 |
| 11 | gross profit | us-gaap:GrossProfit | $634,000 | 2022-12-31 | 2024-04-01 | 10-K | 24-012542 |
| 12 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $4.5M | 2022-12-31 | 2024-04-01 | 10-K | 24-012542 |
| 13 | gross profit | us-gaap:GrossProfit | $131,000 | 2021-12-31 | 2023-04-14 | 10-K | 23-012237 |
| 14 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $131,000 | 2021-12-31 | 2023-04-14 | 10-K | 23-012237 |
| 15 | current assets | us-gaap:AssetsCurrent | $7.7M | 2025-12-31 | 2026-04-15 | 10-K | 26-016874 |
| 16 | current liabilities | us-gaap:LiabilitiesCurrent | $4.1M | 2025-12-31 | 2026-04-15 | 10-K | 26-016874 |
| 17 | retained earnings | us-gaap:RetainedEarningsAccumulatedDeficit | -$69.7M | 2025-12-31 | 2026-04-15 | 10-K | 26-016874 |
| 18 | operating income | us-gaap:OperatingIncomeLoss | -$5.7M | 2025-12-31 | 2026-04-15 | 10-K | 26-016874 |

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| | | | | | | | |
|---|---|---|---|---|---|---|---|
| 19 | book equity | us-gaap:StockholdersEquity | $5.2M | 2025-12-31 | 2026-04-15 | 10-K | 26-016874 |
| 20 | liabilities | us-gaap:Liabilities | $5.0M | 2025-12-31 | 2026-04-15 | 10-K | 26-016874 |
| 21 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $16,000 | 2025-12-31 | 2026-04-15 | 10-K | 26-016874 |
| 22 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | -$3.1M | 2024-12-31 | 2026-04-15 | 10-K | 26-016874 |
| 23 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $7,000 | 2024-12-31 | 2026-04-15 | 10-K | 26-016874 |
| 24 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | -$6.1M | 2023-12-31 | 2025-03-27 | 10-K | 25-000990 |
| 25 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $7,000 | 2023-12-31 | 2025-03-27 | 10-K | 25-000990 |
| 26 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | -$7.3M | 2022-12-31 | 2024-04-01 | 10-K | 24-012542 |
| 27 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $27,000 | 2022-12-31 | 2024-04-01 | 10-K | 24-012542 |
| 28 | depreciation amortization | us-gaap:Depreciation | $27,000 | 2023-12-31 | 2025-03-27 | 10-K | 25-000990 |
| 29 | operating income | us-gaap:OperatingIncomeLoss | -$6.7M | 2023-12-31 | 2025-03-27 | 10-K | 25-000990 |
| 30 | pretax income | us-gaap:IncomeLossFromContinuingOperationsBeforeInc... | -$6.7M | 2023-12-31 | 2025-03-27 | 10-K | 25-000990 |
| 31 | income tax | us-gaap:IncomeTaxExpenseBenefit | -$333,000 | 2023-12-31 | 2025-03-27 | 10-K | 25-000990 |
| 32 | current assets | us-gaap:AssetsCurrent | $6.6M | 2023-12-31 | 2025-03-27 | 10-K | 25-000990 |
| 33 | current liabilities | us-gaap:LiabilitiesCurrent | $3.9M | 2023-12-31 | 2025-03-27 | 10-K | 25-000990 |
| 34 | current assets | us-gaap:AssetsCurrent | $6.1M | 2022-12-31 | 2024-04-01 | 10-K | 24-012542 |
| 35 | current liabilities | us-gaap:LiabilitiesCurrent | $4.2M | 2022-12-31 | 2024-04-01 | 10-K | 24-012542 |
| 36 | assets | us-gaap:Assets | $9.0M | 2023-12-31 | 2025-03-27 | 10-K | 25-000990 |
| 37 | assets | us-gaap:Assets | $9.7M | 2022-12-31 | 2024-04-01 | 10-K | 24-012542 |
| 38 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 4,818,164 | 2026-04-14 | 2026-04-15 | 10-K | 26-016874 |
| 39 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 2,110,748 | 2025-03-10 | 2025-03-27 | 10-K | 25-000990 |

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