Host Digital Inc.

HOST

NYSE; shops; SIC 5411, Retail-Grocery Stores; CIK 0001948864

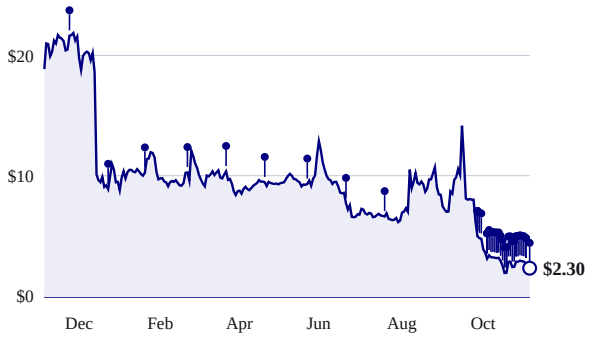
None

No letter

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

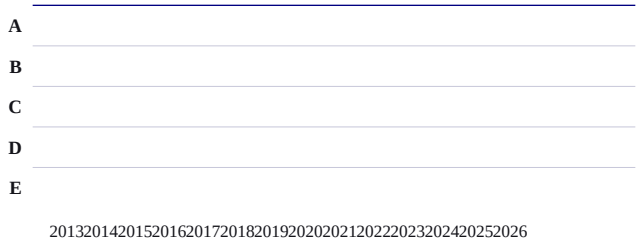
Scoreboard	
Reliability	0.83 AUC filers with $12.5M to $120M assets; 95% interval 0.79 to 0.86; 201 events, 2020 to 2025
Peer failure rate	1.07% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$12.5M to $120M assets total assets $33.5M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	dilution, short runway, thin data not computable: distress
Inputs computable	5 of 14
Graded from	filings received through Mar 16, 2026 234 days before the rescan; latest periodic filing 10-Q received Aug 14, 2026
Last close	$2.30 2026-11-04; market equity $2.1M; 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

Choice Wellness Corp. (the "Company" or "HCWC" or "we" or "our" or "us") is a holding company focused on providing consumers with healthier daily choices with respect to nutrition and other lifestyle alternatives. Choice Markets, Inc.

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 11.6						
Gross profitability	91.5%	42.6%		8.0	238	2025-12-31
Return on invested capital	not computable	10.9%				
one or more required annual facts are missing						
Accruals ratio	(14.6%)	(4.8%)		15.2	283	2025-12-31
Gross margin stability, five years	not computable	1.3 pts				
five annual gross margins are required; found 2						

Not investment advice. Informational and educational only. Data from SEC EDGAR, may contain errors, is not warranted. The grade ranks reported financial condition and is not a return forecast.

Solvency, sleeve percentile 80.4					
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	(1.19)	1.93	75.4	204	2025-12-31
Net debt to EBITDA	not computable	1.37x			
EBITDA must exceed $100,000					
Interest coverage	not computable	3.83x			
one or more required annual facts are missing					
Current ratio	0.79x	1.37x	85.5	291	2025-12-31
Growth and financing, sleeve percentile 95.7					
Revenue growth, three-year compound	not computable	1.6%			
four annual observations are required; found 2					
Free cash flow growth, three-year compound	not computable	4.6%			
four consecutive annual FCF observations are required; found 2					
Reinvestment rate	not computable	12.2%			
one or more required annual facts are missing					
Asset growth, three years	not computable	3.4%			
four annual observations are required; found 2					
Net share issuance, one year	115.3%	(0.6%)	95.7	209	2026-03-16

Warnings

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

Check	Measured
Dilution	split-adjusted year-over-year share growth is 115.3%
Short runway	cash runway is 4.6 months
Thin data	5 of 14 grade factors are computable; minimum is 7

What the price implies

at the 2026-11-04 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(77.3%)	(0.7%)	2
Distance from 52-week high	(89.5%)	(17.6%)	2
EBIT to enterprise value	(41.7%)	5.0%	8
Free cash flow yield	31.7%	3.8%	99
Book value to price	1.64	0.34	94
Sales to price	36.67	1.53	98
Composite equity issuance, five years	not computable	(16.9%)	
Relative strength against the sector, log excess return	(1.39)	0.08	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	pass
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	pass
Asset turnover improved	fail

Not investment advice. Informational and educational only. Data from SEC EDGAR, may contain errors, is not warranted. The grade ranks reported financial condition and is not a return forecast.

Cash, filings, liquidity	
Cash and equivalents	$900,000
Operating cash flow, four quarters	-$2.4M
Months of runway	4.6
Days since last periodic filing	83 (10-Q received Aug 14, 2026)
Median daily dollar volume, 63 sessions	$782,884

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	$30.7M	2025-12-31	2026-03-16	10-K	26-010208
2	assets	us-gaap:Assets	$33.5M	2025-12-31	2026-03-16	10-K	26-010208
3	net income	us-gaap:NetIncomeLoss	-$3.9M	2025-12-31	2026-03-16	10-K	26-010208
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$996,054	2025-12-31	2026-03-16	10-K	26-010208
5	assets	us-gaap:Assets	$34.1M	2024-12-31	2026-03-16	10-K	26-010208
6	current assets	us-gaap:AssetsCurrent	$10.0M	2025-12-31	2026-03-16	10-K	26-010208
7	current liabilities	us-gaap:LiabilitiesCurrent	$12.7M	2025-12-31	2026-03-16	10-K	26-010208
8	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$4.7M	2025-12-31	2026-03-16	10-K	26-010208
9	operating income	us-gaap:OperatingIncomeLoss	-$2.5M	2025-12-31	2026-03-16	10-K	26-010208
10	book equity	us-gaap:StockholdersEquity	$7.3M	2025-12-31	2026-03-16	10-K	26-010208
11	liabilities	us-gaap:Liabilities	$26.2M	2025-12-31	2026-03-16	10-K	26-010208
12	total debt	us-gaap:LongTermDebt	$7.3M	2025-12-31	2026-03-16	10-K	26-010208
13	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$3.0M	2025-12-31	2026-03-16	10-K	26-010208
14	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$1.7M	2025-12-31	2026-03-16	10-K	26-010208
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$78.2M	2025-12-31	2026-03-16	10-K	26-010208
16	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$69.4M	2024-12-31	2026-03-16	10-K	26-010208
17	shares outstanding	dei:EntityCommonStockSharesOutstanding	22,750,825	2026-03-16	2026-03-16	10-K	26-010208
18	shares outstanding	dei:EntityCommonStockSharesOutstanding	10,565,749	2025-03-27	2025-03-28	10-K	25-001000

Not investment advice. Informational and educational only. Data from SEC EDGAR, may contain errors, is not warranted. The grade ranks reported financial condition and is not a return forecast.