ReposiTrak, Inc.

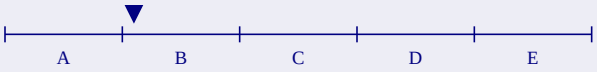
TRAK

NYSE; business equipment; SIC 7374, Services-Computer Processing & Data Preparation; CIK 0000050471

A/B

on the A/B boundary of 497 graded peers in business equipm...

rank 110 of 497; percentile 22.0; sampling error 2.2 points; lower is stronger



A/B, the bull



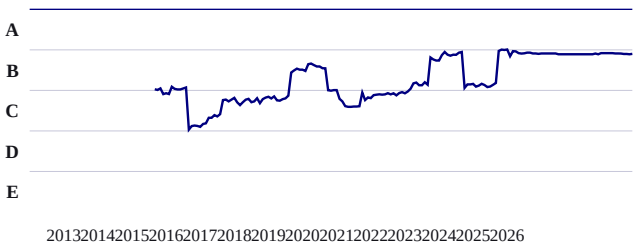
Scoreboard	
Profitability	C percentile 47.9
Solvency	A percentile 16.8
Growth and financing	C percentile 56.0
Reliability	0.83 AUC filers with $12.5M to $120M assets; 95% interval 0.79 to 0.86; 201 events, 2020 to 2025
Peer failure rate	1.07% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$12.5M to $120M assets total assets $60.9M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: short runway, distress, fortress balance sheet
Inputs computable	10 of 14
Graded from	filings received through Sep 28, 2026 38 days before the rescan; latest periodic filing 10-K received Sep 28, 2026
Last close	$7.34 2026-11-04; market equity $133.6M; 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 Sep 29, 2025

ReposiTrak, Inc., a Nevada corporation ("ReposiTrak", "We", "us", "our" or the "Company") is a Software-as-a-Service ("SaaS") which operates a business-to-business ("B2B") e-commerce, compliance & traceability, and supply chain management platform that partners with retailers, wholesalers, distributors and their product suppliers to (a) help them manage specific programs, such as out-of-stock management and scan-based trading; (b) reduce risk in their supply chain by managing compliance documents and data; ensure compliance with new regulatory requirements supporting traceability; and (c) improve product ordering and forecasting in order to accelerate sales, control risks, and improve sup...

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 47.9						
Gross profitability	32.8%	28.6%		39.1	554	2026-06-30
Return on invested capital	not computable	11.2%				

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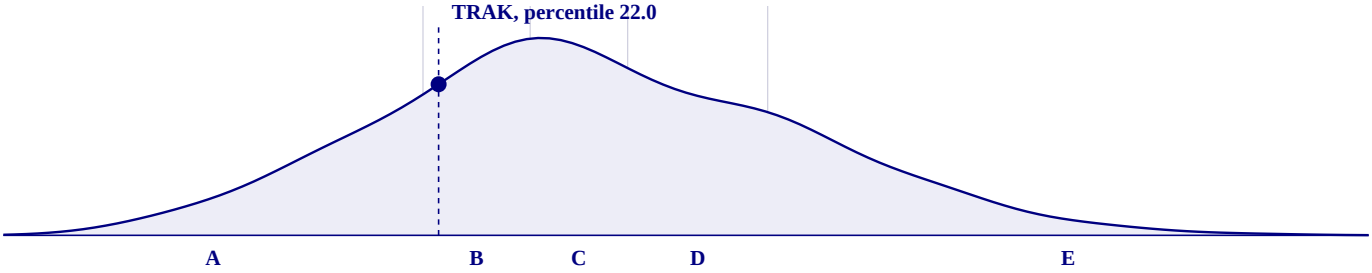
required facts have no common fiscal period end						
Accruals ratio	(1.1%)	(7.3%)		82.8	617	2026-06-30
Gross margin stability, five years	1.2 pts	2.3 pts		21.9	425	2026-06-30
Solvency, sleeve percentile 16.8						
Twelve-month failure probability	not computable	0.05%				
latest liabilities, cash plus short-term investments, book equity, and shares are required						
Altman Z double-prime	9.51	2.16		9.4	564	2026-06-30
Net debt to EBITDA	not computable	1.09x				
required facts have no common fiscal period end						
Interest coverage	not computable	3.77x				
interest expense must exceed $100,000						
Current ratio	3.85x	2.01x		24.2	662	2026-06-30
Growth and financing, sleeve percentile 56.0						
Revenue growth, three-year compound	6.8%	6.4%		48.6	534	2026-06-30
Free cash flow growth, three-year compound	(2.0%)	17.7%		78.7	264	2026-06-30
Reinvestment rate	(72.8%)	13.3%		75.1	222	2026-06-30
Asset growth, three years	6.4%	5.1%		43.4	559	2026-06-30
Net share issuance, one year	(0.5%)	0.5%		34.1	409	2026-09-28

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
105	Clear Secure, Inc. (YOU)	21.0	A/B	
106	Everpure, Inc. (P)	21.2	A/B	
107	UiPath, Inc. (PATH)	21.4	A/B	
108	Novanta Inc. (NOVT)	21.7	A/B	fortress balance sheet
109	Novanta Inc. (NOVTU)	21.7	A/B	fortress balance sheet
110	ReposiTrak, Inc. (TRAK)	22.0	A/B	
111	Tenable Holdings, Inc. (TENB)	22.2	A/B	
112	Vicor Corp. (VICR)	22.4	B	
113	Ooma Inc. (OOMA)	22.6	B	
114	ServiceNow, Inc. (NOW)	22.8	B	
115	Cognex Corp. (CGNX)	23.0	B	

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	(43.9%)	(2.0%)	18
Distance from 52-week high	(52.4%)	(33.1%)	29
EBIT to enterprise value	7.2%	1.7%	88
Free cash flow yield	6.2%	2.8%	75
Book value to price	0.39	0.28	63

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Sales to price	0.18	0.31	33
Composite equity issuance, five years	(9.0%)	4.2%	28
Relative strength against the sector, log excess return	(0.85)	(0.29)	18

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 7 of 9, period end 2026-06-30	
Return on assets above zero	pass
Operating cash flow above zero	pass
Return on assets improved	pass
Operating cash flow exceeds net income	pass
Long-term leverage fell	pass
Current ratio improved	fail
No new shares issued	pass
Gross margin improved	pass
Asset turnover improved	fail
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	38 (10-K received Sep 28, 2026)
Median daily dollar volume, 63 sessions	$546,424

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:RevenueFromContractWithCustomerIncludingAs...	$23.3M	2026-06-30	2026-09-28	10-K	26-031392
2	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$3.3M	2026-06-30	2026-09-28	10-K	26-031392
3	assets	us-gaap:Assets	$60.9M	2026-06-30	2026-09-28	10-K	26-031392
4	net income	us-gaap:NetIncomeLoss	$7.6M	2026-06-30	2026-09-28	10-K	26-031392
5	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$8.2M	2026-06-30	2026-09-28	10-K	26-031392
6	assets	us-gaap:Assets	$55.3M	2025-06-30	2026-09-28	10-K	26-031392
7	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$22.6M	2025-06-30	2026-09-28	10-K	26-031392
8	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$3.7M	2025-06-30	2026-09-28	10-K	26-031392
9	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$20.5M	2024-06-30	2025-09-29	10-K	25-030050
10	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$3.4M	2024-06-30	2025-09-29	10-K	25-030050
11	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$19.1M	2023-06-30	2024-09-30	10-K	24-030271
12	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$3.3M	2023-06-30	2024-09-30	10-K	24-030271
13	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$18.0M	2022-06-30	2023-09-28	10-K	23-027054
14	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$3.2M	2022-06-30	2023-09-28	10-K	23-027054
15	current assets	us-gaap:AssetsCurrent	$32.8M	2026-06-30	2026-09-28	10-K	26-031392
16	current liabilities	us-gaap:LiabilitiesCurrent	$8.5M	2026-06-30	2026-09-28	10-K	26-031392
17	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$7.0M	2026-06-30	2026-09-28	10-K	26-031392
18	operating income	us-gaap:OperatingIncomeLoss	$7.8M	2026-06-30	2026-09-28	10-K	26-031392
19	book equity	us-gaap:StockholdersEquity	$52.3M	2026-06-30	2026-09-28	10-K	26-031392
20	liabilities	us-gaap:Liabilities	$8.6M	2026-06-30	2026-09-28	10-K	26-031392
21	operating income	us-gaap:OperatingIncomeLoss	$5.1M	2023-06-30	2024-09-30	10-K	24-030271
22	interest expense	us-gaap:InterestExpense	$60,990	2023-06-30	2023-09-28	10-K	23-027054
23	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$16,594	2026-06-30	2026-09-28	10-K	26-031392
24	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$8.4M	2025-06-30	2026-09-28	10-K	26-031392
25	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$15,965	2025-06-30	2026-09-28	10-K	26-031392
26	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$7.0M	2024-06-30	2025-09-29	10-K	25-030050
27	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$73,317	2024-06-30	2025-09-29	10-K	25-030050

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28	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$8.9M	2023-06-30	2024-09-30	10-K	24-030271
29	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$133,944	2023-06-30	2024-09-30	10-K	24-030271
30	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$647,637	2026-06-30	2026-09-28	10-K	26-031392
31	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$9.5M	2026-06-30	2026-09-28	10-K	26-031392
32	income tax	us-gaap:IncomeTaxExpenseBenefit	$1.9M	2026-06-30	2026-09-28	10-K	26-031392
33	current assets	us-gaap:AssetsCurrent	$33.7M	2025-06-30	2026-09-28	10-K	26-031392
34	current liabilities	us-gaap:LiabilitiesCurrent	$5.5M	2025-06-30	2026-09-28	10-K	26-031392
35	assets	us-gaap:Assets	$51.6M	2024-06-30	2025-09-29	10-K	25-030050
36	assets	us-gaap:Assets	$50.6M	2023-06-30	2024-09-30	10-K	24-030271
37	shares outstanding	dei:EntityCommonStockSharesOutstanding	18,201,204	2026-09-28	2026-09-28	10-K	26-031392
38	shares outstanding	dei:EntityCommonStockSharesOutstanding	18,283,903	2025-09-29	2025-09-29	10-K	25-030050

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