Urban ONE, Inc.

UONE

Nasdaq; telecom; SIC 4832, Radio Broadcasting Stations; CIK 0001041657

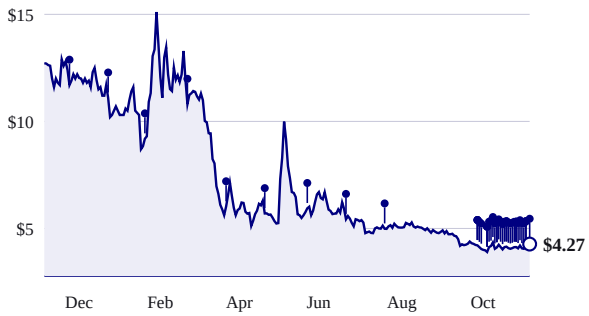
None

No letter

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

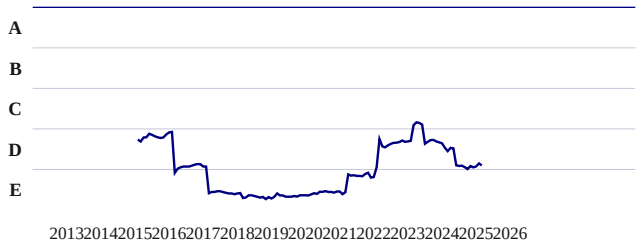
Scoreboard	
Reliability	0.91 AUC filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025
Peer failure rate	1.01% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$591M to $2.67B assets total assets $593.0M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	thin data not computable: dilution, distress
Inputs computable	6 of 14
Graded from	filings received through Mar 20, 2026 230 days before the rescan; latest periodic filing 10-Q received Aug 4, 2026
Last close	$4.18 2026-10-19; 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 Mar 20, 2026

Urban One, Inc., a Delaware corporation, and its subsidiaries (collectively, "Urban One", the "Company", "we", "our" and/or "us") is an urban-oriented, multi-media company that primarily targets African-American and urban consumers. Our core business is our radio broadcasting franchise, which is the largest radio broadcasting operation that primarily targets African-American and urban listeners. As of December 31, 2025, we owned and/or operated 76 independently formatted, revenue producing broadcast stations (including 58 FM or AM stations, 16 HD stations, and the 2 low power television stations we operate), located in 13 of the most populous African-American markets in the United States.

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 55.4						
Gross profitability	not computable	28.3%				

latest aligned inputs end 2018-12-31; latest annual assets end 2025-12-31

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Return on invested capital	(29.5%)	8.9%	91.1	175	2025-12-31
Accruals ratio	(19.6%)	(7.3%)	19.6	696	2025-12-31
Gross margin stability, five years	not computable	2.3 pts			
latest aligned inputs end 2018-12-31; latest annual assets end 2025-12-31					
Solvency, sleeve percentile 60.9					
Twelve-month failure probability	not computable	0.05%			
firm-wide XBRL shares cannot be assigned to one ticker class					
Altman Z double-prime	(6.35)	1.93	77.6	620	2025-12-31
Net debt to EBITDA	not computable	1.69x			
EBITDA must exceed $100,000					
Interest coverage	not computable	2.81x			
latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31					
Current ratio	2.10x	1.95x	44.2	754	2025-12-31
Growth and financing, sleeve percentile 88.0					
Revenue growth, three-year compound	(8.2%)	5.8%	83.1	609	2025-12-31
Free cash flow growth, three-year compound	not computable	15.0%			
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	(23.9%)	4.0%	92.8	635	2025-12-31
Net share issuance, one year	not computable	0.6%			
firm-wide XBRL shares cannot be assigned to one ticker class					

Warnings

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

Check	Measured
Thin data	6 of 14 grade factors are computable; minimum is 7

What the price implies

at the 2026-10-19 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(68.2%)	(3.1%)	8
Distance from 52-week high	(71.7%)	(32.4%)	12
EBIT to enterprise value	not computable	1.7%	
Free cash flow yield	not computable	2.9%	
Book value to price	not computable	0.28	
Sales to price	not computable	0.34	
Composite equity issuance, five years	not computable	3.6%	
Relative strength against the sector, log excess return	(1.12)	(0.26)	11

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	fail

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Asset turnover improved	pass

Cash, filings, liquidity

Cash and equivalents	$15.4M
Operating cash flow, four quarters	$10.6M
Months of runway	not finite
Days since last periodic filing	93 (10-Q received Aug 4, 2026)
Median daily dollar volume, 63 sessions	$24,284

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	$439.1M	2018-12-31	2019-03-18	10-K	19-014649
2	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$125.4M	2018-12-31	2019-03-18	10-K	19-014649
3	assets	us-gaap:Assets	$1.2B	2018-12-31	2020-04-29	10-K	20-053397
4	operating income	us-gaap:OperatingIncomeLoss	-$170.1M	2025-12-31	2026-03-20	10-K	26-000016
5	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$162.9M	2025-12-31	2026-03-20	10-K	26-000016
6	income tax	us-gaap:IncomeTaxExpenseBenefit	-$16.0M	2025-12-31	2026-03-20	10-K	26-000016
7	total debt	us-gaap:LongTermDebt	$429.7M	2025-12-31	2026-03-20	10-K	26-000016
8	book equity	us-gaap:StockholdersEquity	$24.6M	2025-12-31	2026-03-20	10-K	26-000016
9	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$25.5M	2025-12-31	2026-03-20	10-K	26-000016
10	total debt	us-gaap:LongTermDebt	$579.1M	2024-12-31	2026-03-20	10-K	26-000016
11	book equity	us-gaap:StockholdersEquity	$170.9M	2024-12-31	2026-03-20	10-K	26-000016
12	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$137.1M	2024-12-31	2026-03-20	10-K	26-000016
13	net income	us-gaap:NetIncomeLoss	-$146.9M	2025-12-31	2026-03-20	10-K	26-000016
14	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$4.2M	2025-12-31	2026-03-20	10-K	26-000016
15	assets	us-gaap:Assets	$593.0M	2025-12-31	2026-03-20	10-K	26-000016
16	assets	us-gaap:Assets	$944.8M	2024-12-31	2026-03-20	10-K	26-000016
17	revenue	us-gaap:Revenues	$440.0M	2017-12-31	2019-03-18	10-K	19-014649
18	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$130.4M	2017-12-31	2019-03-18	10-K	19-014649
19	revenue	us-gaap:Revenues	$456.2M	2016-12-31	2018-03-16	10-K	18-015060
20	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$134.0M	2016-12-31	2018-03-16	10-K	18-015060
21	revenue	us-gaap:Revenues	$450.9M	2015-12-31	2017-03-10	10-K	17-013955
22	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$134.4M	2015-12-31	2017-03-10	10-K	17-013955
23	revenue	us-gaap:Revenues	$441.4M	2014-12-31	2017-03-10	10-K	17-013955
24	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$141.7M	2014-12-31	2017-03-10	10-K	17-013955
25	current assets	us-gaap:AssetsCurrent	$164.5M	2025-12-31	2026-03-20	10-K	26-000016
26	current liabilities	us-gaap:LiabilitiesCurrent	$78.3M	2025-12-31	2026-03-20	10-K	26-000016
27	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$985.6M	2025-12-31	2026-03-20	10-K	26-000016
28	liabilities	us-gaap:Liabilities	$565.8M	2025-12-31	2026-03-20	10-K	26-000016
29	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$18.1M	2025-12-31	2026-03-20	10-K	26-000016
30	operating income	us-gaap:OperatingIncomeLoss	-$31.6M	2023-12-31	2025-03-27	10-K	25-000013
31	interest expense	us-gaap:InterestExpense	$56.2M	2023-12-31	2024-06-07	10-K	24-009018
32	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$374.4M	2025-12-31	2026-03-20	10-K	26-000016
33	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$449.7M	2024-12-31	2026-03-20	10-K	26-000016
34	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$477.7M	2023-12-31	2025-03-27	10-K	25-000013
35	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$484.6M	2022-12-31	2024-06-07	10-K	24-009018
36	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$10.1M	2025-12-31	2026-03-20	10-K	26-000016
37	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$37.5M	2024-12-31	2026-03-20	10-K	26-000016
38	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$7.2M	2024-12-31	2026-03-20	10-K	26-000016
39	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$64.6M	2023-12-31	2025-03-27	10-K	25-000013
40	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$7.7M	2023-12-31	2025-03-27	10-K	25-000013
41	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$66.5M	2022-12-31	2024-06-07	10-K	24-009018
42	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$6.8M	2022-12-31	2024-06-07	10-K	24-009018
43	current assets	us-gaap:AssetsCurrent	$305.4M	2024-12-31	2026-03-20	10-K	26-000016
44	current liabilities	us-gaap:LiabilitiesCurrent	$114.3M	2024-12-31	2026-03-20	10-K	26-000016
45	assets	us-gaap:Assets	$1.2B	2023-12-31	2025-03-27	10-K	25-000013

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46	assets	us-gaap:Assets	$1.3B	2022-12-31	2024-06-07	10-K	24-009018	