i-80 Gold Corp.

IAUX

NYSE; other; SIC 1040, Gold and Silver Ores; CIK 0001853962

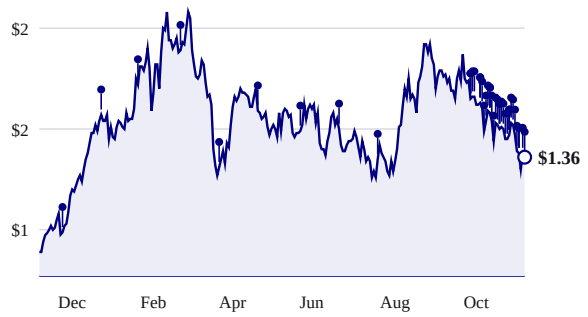
None

No letter

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

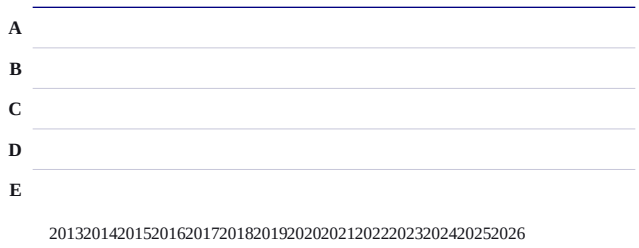
Scoreboard	
Reliability	0.91 AUC filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025
Peer failure rate	1.01% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$591M to $2.67B assets total assets $703.4M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	late filer, thin data not computable: dilution, distress
Inputs computable	6 of 14
Graded from	filings received through Feb 19, 2026 260 days before the rescan; latest periodic filing 10-Q received Nov 2, 2026
Last close	$1.35 2026-11-05; 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 Feb 19, 2026

Unless otherwise indicated or the context otherwise requires, use of the terms "Company", "i-80" and "i-80 Gold" in this Annual Report refer to i-80 Gold Corp. and its direct and indirect subsidiaries as of the date of this Annual Report, or other entities controlled by them, on a consolidated basis, notwithstanding that such direct and indirect subsidiaries may not have been controlled by them at all relevant times, including December 31, 2025. i-80 Gold Corp.

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 67.3						
Gross profitability	1.6%	27.1%		92.1	286	2025-12-31
Return on invested capital	(25.2%)	10.0%		96.3	151	2025-12-31
Accruals ratio	(17.0%)	(5.8%)		13.5	502	2025-12-31
Gross margin stability, five years	not computable	2.2 pts				

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.

five annual gross margins are required; found 2						
Solvency, sleeve percentile 79.9						
Twelve-month failure probability	not computable	0.04%				
firm-wide XBRL shares cannot be assigned to one ticker class						
Altman Z double-prime	(2.76)	2.06		76.4	388	2025-12-31
Net debt to EBITDA	not computable	2.51x				
EBITDA must exceed $100,000						
Interest coverage	(4.20x)	2.45x		83.1	87	2025-12-31
Current ratio	0.73x	1.33x		80.2	508	2025-12-31
Growth and financing						
Revenue growth, three-year compound	not computable	5.1%				
four annual observations are required; found 2						
Free cash flow growth, three-year compound	not computable	8.9%				
four consecutive annual FCF observations are required; found 2						
Reinvestment rate	not computable	11.9%				
a prior annual working-capital observation is required						
Asset growth, three years	not computable	4.1%				
four annual observations are required; found 2						
Net share issuance, one year	not computable	(0.5%)				
firm-wide XBRL shares cannot be assigned to one ticker class						

Warnings

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

Check	Measured
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 2026-11-05 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	70.6%	(0.6%)	92
Distance from 52-week high	(34.6%)	(24.6%)	36
EBIT to enterprise value	not computable	4.4%	
Free cash flow yield	not computable	4.1%	
Book value to price	not computable	0.35	
Sales to price	not computable	0.71	
Composite equity issuance, five years	not computable	(8.8%)	
Relative strength against the sector, log excess return	0.41	(0.13)	92

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	pass
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	$411.4M
Operating cash flow, four quarters	-$161.5M
Months of runway	30.6
Days since last periodic filing	4 (10-Q received Nov 2, 2026)
Median daily dollar volume, 63 sessions	$11.5M

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	$11.5M	2025-12-31	2026-02-19	10-K	26-009886
2	assets	us-gaap:Assets	$703.4M	2025-12-31	2026-02-19	10-K	26-009886
3	operating income	us-gaap:OperatingIncomeLoss	-$124.4M	2025-12-31	2026-02-19	10-K	26-009886
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$202.1M	2025-12-31	2026-02-19	10-K	26-009886
5	income tax	us-gaap:IncomeTaxExpenseBenefit	-$3.3M	2025-12-31	2026-02-19	10-K	26-009886
6	total debt	us-gaap:LongTermDebt	$174.7M	2025-12-31	2026-02-19	10-K	26-009886
7	book equity	us-gaap:StockholdersEquity	$346.8M	2025-12-31	2026-02-19	10-K	26-009886
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$63.2M	2025-12-31	2026-02-19	10-K	26-009886
9	total debt	us-gaap:LongTermDebt	$191.4M	2024-12-31	2026-02-19	10-K	26-009886
10	book equity	us-gaap:StockholdersEquity	$340.7M	2024-12-31	2026-02-19	10-K	26-009886
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$19.0M	2024-12-31	2026-02-19	10-K	26-009886
12	net income	us-gaap:NetIncomeLoss	-$198.8M	2025-12-31	2026-02-19	10-K	26-009886
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$83.6M	2025-12-31	2026-02-19	10-K	26-009886
14	assets	us-gaap:Assets	$655.6M	2024-12-31	2026-02-19	10-K	26-009886
15	current assets	us-gaap:AssetsCurrent	$100.3M	2025-12-31	2026-02-19	10-K	26-009886
16	current liabilities	us-gaap:LiabilitiesCurrent	$138.3M	2025-12-31	2026-02-19	10-K	26-009886
17	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$483.7M	2025-12-31	2026-02-19	10-K	26-009886
18	liabilities	us-gaap:Liabilities	$356.6M	2025-12-31	2026-02-19	10-K	26-009886
19	operating income	us-gaap:OperatingIncomeLoss	-$89.1M	2024-12-31	2026-02-19	10-K	26-009886
20	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$3.2M	2024-12-31	2025-04-01	10-K	25-015753
21	interest expense	us-gaap:InterestExpense	$29.6M	2025-12-31	2026-02-19	10-K	26-009886
22	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$95.2M	2025-12-31	2026-02-19	10-K	26-009886
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$50.3M	2024-12-31	2026-02-19	10-K	26-009886
24	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$2.0M	2024-12-31	2026-02-19	10-K	26-009886
25	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$120.0M	2024-12-31	2026-02-19	10-K	26-009886
26	income tax	us-gaap:IncomeTaxExpenseBenefit	$1.5M	2024-12-31	2026-02-19	10-K	26-009886
27	current assets	us-gaap:AssetsCurrent	$42.3M	2024-12-31	2026-02-19	10-K	26-009886
28	current liabilities	us-gaap:LiabilitiesCurrent	$74.0M	2024-12-31	2026-02-19	10-K	26-009886

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.