PodcastOne, Inc.

PODC

Nasdaq; business equipment; SIC 7370, Services-Computer Programming, Data Processing, Etc.; CIK 0001940177

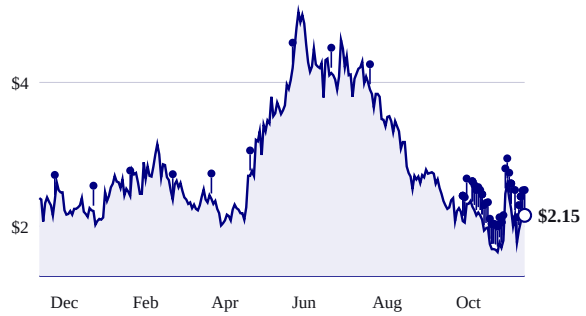
None

No letter

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

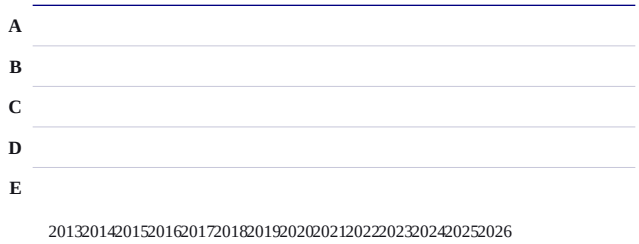
Scoreboard	
Reliability	0.83 AUC filers with $12.5M to $120M assets; 95% interval 0.79 to 0.86; 201 events, 2020 to 2025
Peer failure rate	1.07% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$12.5M to $120M assets total assets $29.2M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	late filer, thin data not computable: distress, fortress balance sheet
Inputs computable	5 of 14
Graded from	filings received through Jun 29, 2026 136 days before the rescan; latest periodic filing 10-Q received Aug 14, 2026
Last close	$2.17 2026-11-11; market equity $65.6M; 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 Jun 29, 2026

PodcastOne, Inc. (the "Company," "PodcastOne," "we," "us" or "our") is a leading podcast platform and publisher that makes its content available to audiences via all podcasting distribution platforms, including PodcastOne's website (www.podcastone.com), Apple Podcasts, Spotify, Amazon Music and more. We are a majority owned subsidiary of LiveOne, Inc., a Delaware corporation and a Nasdaq-listed company ("LiveOne"). We have recently been ranked as high as #8 on the list of Top Podcast Publishers by the podcast metric company Podtrac.

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 35.4						
Gross profitability	25.9%	28.7%		52.1	552	2026-03-31
Return on invested capital	not computable	11.4%				
one or more required annual facts are missing						

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Accruals ratio	(20.2%)	(7.3%)		18.7	615	2026-03-31
Gross margin stability, five years	not computable	2.3 pts				
five annual gross margins are required; found 3						
Solvency, sleeve percentile 78.9						
Twelve-month failure probability	not computable	0.06%				
four consecutive discrete net-income quarters are required; found 4						
Altman Z double-prime	(3.66)	2.21		72.9	562	2026-03-31
Net debt to EBITDA	not computable	1.08x				
one or more required annual facts are missing						
Interest coverage	not computable	3.77x				
latest aligned inputs end 2024-03-31; latest annual assets end 2026-03-31						
Current ratio	0.92x	2.01x		84.8	660	2026-03-31
Growth and financing, sleeve percentile 82.0						
Revenue growth, three-year compound	not computable	6.5%				
four annual observations are required; found 3						
Free cash flow growth, three-year compound	not computable	18.0%				
four consecutive annual FCF observations are required; found 3						
Reinvestment rate	not computable	15.1%				
NOPAT must exceed $100,000						
Asset growth, three years	not computable	5.2%				
four annual observations are required; found 3						
Net share issuance, one year	14.2%	0.5%		82.0	406	2026-06-26

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	5 of 14 grade factors are computable; minimum is 7

What the price implies

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

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	3.1%	(2.0%)	54
Distance from 52-week high	(56.8%)	(32.9%)	22
EBIT to enterprise value	not computable	1.6%	
Free cash flow yield	3.7%	2.7%	60
Book value to price	0.37	0.27	61
Sales to price	0.95	0.31	74
Composite equity issuance, five years	not computable	4.3%	
Relative strength against the sector, log excess return	(0.24)	(0.29)	54

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score None of 9, period end 2026-03-31	
Return on assets above zero	fail
Operating cash flow above zero	pass
Return on assets improved	pass
Operating cash flow exceeds net income	pass
Long-term leverage fell	fail
Current ratio improved	fail
No new shares issued	fail

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Gross margin improved	pass
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$7.0M
Operating cash flow, four quarters	$1.1M
Months of runway	not finite
Days since last periodic filing	90 (10-Q received Aug 14, 2026)
Median daily dollar volume, 63 sessions	$185,490

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...	$61.7M	2026-03-31	2026-06-29	10-K	26-021988
2	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$54.1M	2026-03-31	2026-06-29	10-K	26-021988
3	assets	us-gaap:Assets	$29.2M	2026-03-31	2026-06-29	10-K	26-021988
4	net income	us-gaap:NetIncomeLoss	-$2.6M	2026-03-31	2026-06-29	10-K	26-021988
5	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$2.5M	2026-03-31	2026-06-29	10-K	26-021988
6	assets	us-gaap:Assets	$21.2M	2025-03-31	2026-06-29	10-K	26-021988
7	current assets	us-gaap:AssetsCurrent	$11.1M	2026-03-31	2026-06-29	10-K	26-021988
8	current liabilities	us-gaap:LiabilitiesCurrent	$12.0M	2026-03-31	2026-06-29	10-K	26-021988
9	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$38.7M	2026-03-31	2026-06-29	10-K	26-021988
10	operating income	us-gaap:OperatingIncomeLoss	-$2.6M	2026-03-31	2026-06-29	10-K	26-021988
11	book equity	us-gaap:StockholdersEquity	$17.1M	2026-03-31	2026-06-29	10-K	26-021988
12	liabilities	us-gaap:Liabilities	$12.1M	2026-03-31	2026-06-29	10-K	26-021988
13	operating income	us-gaap:OperatingIncomeLoss	-$5.0M	2024-03-31	2025-07-02	10-K	25-022022
14	interest expense	us-gaap:InterestExpense	$2.2M	2024-03-31	2024-07-01	10-K	24-021729
15	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$52.1M	2025-03-31	2026-06-29	10-K	26-021988
16	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$43.3M	2024-03-31	2025-07-02	10-K	25-022022
17	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$22,000	2026-03-31	2026-06-29	10-K	26-021988
18	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$616,000	2026-03-31	2026-06-29	10-K	26-021988
19	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$2.6M	2026-03-31	2026-06-29	10-K	26-021988
20	income tax	us-gaap:IncomeTaxExpenseBenefit	$0	2026-03-31	2026-06-29	10-K	26-021988
21	current assets	us-gaap:AssetsCurrent	$7.6M	2025-03-31	2026-06-29	10-K	26-021988
22	current liabilities	us-gaap:LiabilitiesCurrent	$6.1M	2025-03-31	2026-06-29	10-K	26-021988
23	assets	us-gaap:Assets	$24.1M	2024-03-31	2025-07-02	10-K	25-022022
24	shares outstanding	dei:EntityCommonStockSharesOutstanding	30,065,514	2026-06-26	2026-06-29	10-K	26-021988
25	shares outstanding	dei:EntityCommonStockSharesOutstanding	26,316,972	2025-06-30	2025-07-02	10-K	25-022022

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