# DataMeds AI, Inc.

**MEDS**

Nasdaq; shops; SIC 5122, Wholesale-Drugs, Proprietaries & Druggists' Sundries; CIK 0002030763

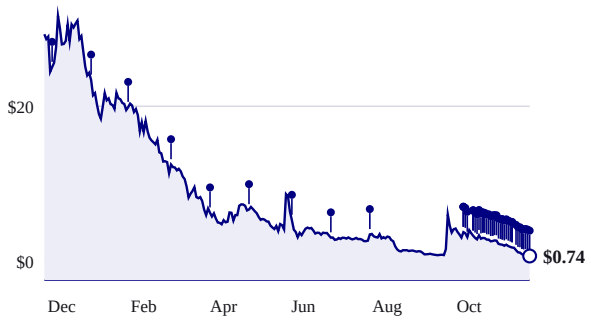
# None

**No letter**

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

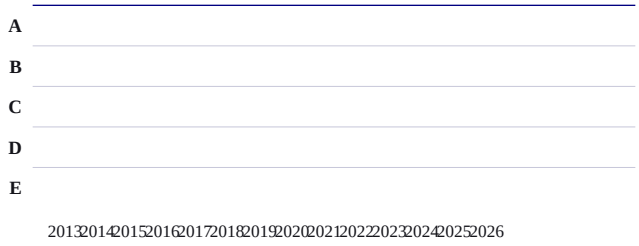
| Scoreboard | |
|---|---|
| **Reliability** | 0.83 AUC<br>filers with $12.5M to $120M assets; 95% interval 0.79 to 0.86; 201 events, 2020 to 2025 |
| **Peer failure rate** | 1.07% a year<br>Item 1.03 bankruptcies, same asset band, 2012 to 2025 |
| **Size band** | $12.5M to $120M assets<br>total assets $30.5M |
| **Standard universe** | inside<br>revenue above $1M and assets above $10M |
| **Warnings** | dilution, short runway, late filer, thin...<br>not computable: distress |
| **Inputs computable** | 5 of 14 |
| **Graded from** | filings received through Apr 24, 2026<br>206 days before the rescan; latest periodic filing 10-Q received Nov 13, 2026 |
| **Last close** | $0.74<br>2026-11-13; market equity $4.2M; 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*

in 2022, we are a holding company for existing and future planned operating companies centered around pharmaceuticals and healthcare services. We seek to be a micro health ecosystem, with a portfolio of companies consisting of a pharmacy, wholesale operations, and a technology division that provides a novel platform for hub and clinical services. We are focused on improving the lives of patients while delivering unique solutions for pharmacies, providers, pharmaceutical manufacturers, and payors.

## 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 50.4** | | | | | | |
| Gross profitability | (21.1%) | 42.9% | | 100.0 | 237 | 2025-12-31 |
| Return on invested capital | not computable | 11.2% | | | | |
| *one or more required annual facts are missing* | | | | | | |
| Accruals ratio | (206.0%) | (4.9%) | | 0.7 | 282 | 2025-12-31 |

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| | | | | | | |
|---|---|---|---|---|---|---|
| Gross margin stability, five years | not computable | 1.3 pts | | | | |
| *five annual gross margins are required; found 2* | | | | | | |
| **Solvency, sleeve percentile 98.2** | | | | | | |
| 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 | (38.68) | 1.93 | | 97.0 | 203 | 2025-12-31 |
| Net debt to EBITDA | not computable | 1.38x | | | | |
| *EBITDA must exceed $100,000* | | | | | | |
| Interest coverage | not computable | 3.27x | | | | |
| *one or more required annual facts are missing* | | | | | | |
| Current ratio | 0.09x | 1.37x | | 99.3 | 294 | 2025-12-31 |
| **Growth and financing, sleeve percentile 95.2** | | | | | | |
| 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 0* | | | | | | |
| Reinvestment rate | not computable | 16.4% | | | | |
| *one or more required annual facts are missing* | | | | | | |
| Asset growth, three years | not computable | 3.1% | | | | |
| *four annual observations are required; found 2* | | | | | | |
| Net share issuance, one year | 101.9% | (0.6%) | | 95.2 | 210 | 2026-03-06 |

## Warnings

*4 of 7 checks triggered; none of them enters the letter*

| Check | Measured |
|---|---|
| Dilution | split-adjusted year-over-year share growth is 101.9% |
| Short runway | cash runway is 0.4 months |
| Late filer | found 4 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 2026-11-13 close; none of these enters the grade*

| Measure | Value | Peer median | Percentile |
|---|---|---|---|
| Twelve-month price change, skipping the latest month | (90.9%) | (0.7%) | 1 |
| Distance from 52-week high | (97.7%) | (20.3%) | 1 |
| EBIT to enterprise value | (427.2%) | 5.1% | 1 |
| Free cash flow yield | not computable | 3.8% | |
| Book value to price | (0.40) | 0.34 | 5 |
| Sales to price | 5.48 | 1.51 | 83 |
| Composite equity issuance, five years | not computable | (15.8%) | |
| Relative strength against the sector, log excess return | (2.31) | 0.08 | 1 |

## 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 | fail |

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| | |
|---|---|
| No new shares issued | fail |
| Gross margin improved | fail |
| Asset turnover improved | fail |

**Cash, filings, liquidity**

| | |
|---|---|
| Cash and equivalents | $476,598 |
| Operating cash flow, four quarters | -$15.5M |
| Months of runway | 0.4 |
| Days since last periodic filing | 3 (10-Q received Nov 13, 2026) |
| Median daily dollar volume, 63 sessions | $839,065 |

## 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 | -$6.4M | 2025-12-31 | 2026-03-20 | 10-K | 26-012004 |
| 2 | assets | us-gaap:Assets | $30.5M | 2025-12-31 | 2026-03-20 | 10-K | 26-012004 |
| 3 | net income | us-gaap:NetIncomeLoss | -$101.3M | 2025-12-31 | 2026-03-20 | 10-K | 26-012004 |
| 4 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | -$10.9M | 2025-12-31 | 2026-03-20 | 10-K | 26-012004 |
| 5 | assets | us-gaap:Assets | $57.3M | 2024-12-31 | 2026-03-20 | 10-K | 26-012004 |
| 6 | current assets | us-gaap:AssetsCurrent | $2.8M | 2025-12-31 | 2026-03-20 | 10-K | 26-012004 |
| 7 | current liabilities | us-gaap:LiabilitiesCurrent | $29.8M | 2025-12-31 | 2026-03-20 | 10-K | 26-012004 |
| 8 | retained earnings | us-gaap:RetainedEarningsAccumulatedDeficit | -$111.0M | 2025-12-31 | 2026-03-20 | 10-K | 26-012004 |
| 9 | operating income | us-gaap:OperatingIncomeLoss | -$93.7M | 2025-12-31 | 2026-03-20 | 10-K | 26-012004 |
| 10 | book equity | us-gaap:StockholdersEquity | -$12.4M | 2025-12-31 | 2026-03-20 | 10-K | 26-012004 |
| 11 | liabilities | us-gaap:Liabilities | $42.9M | 2025-12-31 | 2026-03-20 | 10-K | 26-012004 |
| 12 | total debt | us-gaap:LongTermDebt | $23.5M | 2025-12-31 | 2026-03-20 | 10-K | 26-012004 |
| 13 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $42,571 | 2025-12-31 | 2026-03-20 | 10-K | 26-012004 |
| 14 | depreciation amortization | us-gaap:Depreciation | $158,804 | 2025-12-31 | 2026-03-20 | 10-K | 26-012004 |
| 15 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $23.3M | 2025-12-31 | 2026-03-20 | 10-K | 26-012004 |
| 16 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $18.1M | 2024-12-31 | 2026-03-20 | 10-K | 26-012004 |
| 17 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 104,871,987 | 2026-03-06 | 2026-04-24 | 10-K/A | 26-018958 |
| 18 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 51,944,397 | 2025-03-20 | 2025-03-25 | 10-K | 25-000612 |

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