GoodRx Holdings, Inc.

GDRX

Nasdaq; business equipment; SIC 7374, Services-Computer Processing & Data Preparation; CIK 0001809519

D/E

on the D/E boundary of 468 graded peers in business equipm...

rank 367 of 468; percentile 78.4; sampling error 2.3 points; lower is stronger

A B C D E

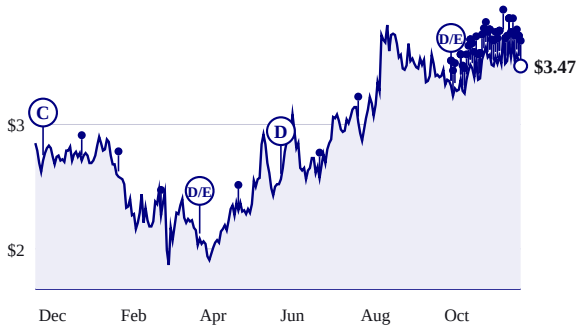
D/E, the sloth



Scoreboard

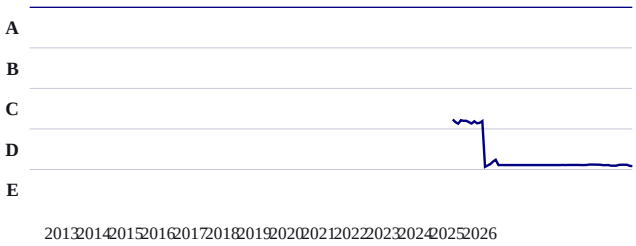
Profitability	C	percentile 51.5
Solvency	C	percentile 55.3
Growth and financing	D	percentile 73.8
Reliability	0.91 AUC	filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025
Peer failure rate	1.01% a year	Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$591M to $2.67B assets	total assets $1.4B
Standard universe	inside	revenue above $1M and assets above $10M
Warnings	late filer	not computable: dilution, distress
Inputs computable	9 of 13	
Graded from	filings received through Feb 26, 2026	265 days before the rescan; latest periodic filing 10-Q received Aug 5, 2026
Last close	$3.48	2026-11-17; 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 26, 2026

Our mission is to help Americans save time and money when filling their medications. To achieve this, we are building the leading, consumer-focused digital healthcare platform in the United States. GoodRx was founded to solve the challenges that consumers face in understanding, accessing, and affording healthcare by removing the friction and inefficiencies in the system. We started with a price comparison tool for prescriptions, offering consumers free access to lower prices on their medication.

The thirteen 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 51.5						
Gross profitability	not computable	29.2%				
one or more required annual facts are missing						
Return on invested capital	5.8%	11.2%		62.3	123	2025-12-31
Accruals ratio	(9.8%)	(7.4%)		40.8	565	2025-12-31

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Gross margin stability, five years	not computable	2.3 pts				
five annual gross margins are required; found 0						
Solvency, sleeve percentile 55.3						
Altman Z double-prime	(0.18)	2.21		60.7	515	2025-12-31
Net debt to EBITDA	2.54x	1.11x		69.3	138	2025-12-31
Interest coverage	not computable	4.90x				
one or more required annual facts are missing						
Current ratio	2.61x	1.98x		36.0	599	2025-12-31
Growth and financing, sleeve percentile 73.8						
Revenue growth, three-year compound	1.3%	6.5%		64.8	501	2025-12-31
Free cash flow growth, three-year compound	4.8%	17.5%		68.7	253	2025-12-31
Reinvestment rate	(294.9%)	15.1%		89.1	212	2025-12-31
Asset growth, three years	(4.4%)	5.0%		72.7	518	2025-12-31
Net share issuance, one year	not computable	0.5%				
two annual share counts are required; found 0						

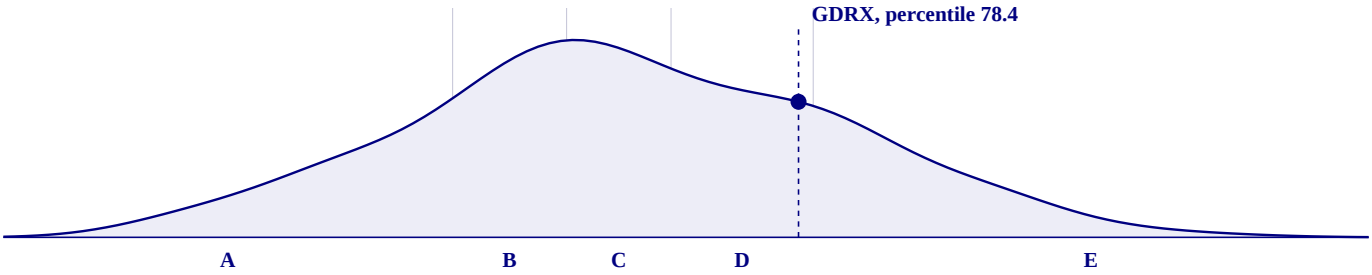
Warnings

1 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

Among 468 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
362	AmpliTech Group, Inc. (AMPG)	77.3	D	fortress balance sheet
363	Harvard Bioscience Inc. (HBIO)	77.5	D	
364	Airgain Inc. (AIRG)	77.7	D/E	
365	Automatic Data Processing Inc. (ADP)	77.9	D/E	fortress balance sheet
366	C3.ai, Inc. (AI)	78.2	D/E	
367	GoodRx Holdings, Inc. (GDRX)	78.4	D/E	late filer
368	Duos Technologies Group, Inc. (DUOT)	78.6	D/E	dilution, late filer, fortress balance sheet
369	Spectrum Brands Holdings, Inc. (SPB)	78.8	D/E	
370	Thermo Fisher Scientific Inc. (TMO)	79.0	D/E	
371	SmartRent, Inc. (SMRT)	79.2	D/E	
372	Asure Software Inc. (ASUR)	79.4	D/E	

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What the price implies

at the 2026-11-17 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(2.4%)	(2.2%)	49
Distance from 52-week high	(8.7%)	(37.6%)	87
EBIT to enterprise value	not computable	1.8%	
Free cash flow yield	not computable	3.0%	
Book value to price	not computable	0.27	
Sales to price	not computable	0.32	
Composite equity issuance, five years	not computable	4.3%	
Relative strength against the sector, log excess return	(0.29)	(0.29)	49
Twelve-month failure probability, CHS model	not computable	0.05%	

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	pass
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
Gross margin improved	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$296.1M
Operating cash flow, four quarters	$201.6M
Months of runway	not finite
Days since last periodic filing	105 (10-Q received Aug 5, 2026)
Median daily dollar volume, 63 sessions	$3.5M

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	operating income	us-gaap:OperatingIncomeLoss	$87.5M	2025-12-31	2026-02-26	10-K	26-000031
2	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$56.5M	2025-12-31	2026-02-26	10-K	26-000031
3	income tax	us-gaap:IncomeTaxExpenseBenefit	$26.1M	2025-12-31	2026-02-26	10-K	26-000031
4	total debt	us-gaap:LongTermDebt	$495.0M	2025-12-31	2026-02-26	10-K	26-000031
5	book equity	us-gaap:StockholdersEquity	$616.3M	2025-12-31	2026-02-26	10-K	26-000031
6	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$261.8M	2025-12-31	2026-02-26	10-K	26-000031
7	total debt	us-gaap:LongTermDebt	$500.0M	2024-12-31	2025-02-27	10-K	25-000040
8	book equity	us-gaap:StockholdersEquity	$724.7M	2024-12-31	2026-02-26	10-K	26-000031
9	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$448.3M	2024-12-31	2026-02-26	10-K	26-000031
10	net income	us-gaap:NetIncomeLoss	$30.4M	2025-12-31	2026-02-26	10-K	26-000031
11	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$167.9M	2025-12-31	2026-02-26	10-K	26-000031
12	assets	us-gaap:Assets	$1.4B	2025-12-31	2026-02-26	10-K	26-000031
13	assets	us-gaap:Assets	$1.4B	2024-12-31	2026-02-26	10-K	26-000031
14	current assets	us-gaap:AssetsCurrent	$643.1M	2025-12-31	2026-02-26	10-K	26-000031
15	current liabilities	us-gaap:LiabilitiesCurrent	$246.0M	2025-12-31	2026-02-26	10-K	26-000031
16	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$1.4B	2025-12-31	2026-02-26	10-K	26-000031
17	liabilities	us-gaap:Liabilities	$787.8M	2025-12-31	2026-02-26	10-K	26-000031

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18	depreciation amortization	us-gaap:Depreciation	$4.2M	2025-12-31	2026-02-26	10-K	26-000031
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$796.9M	2025-12-31	2026-02-26	10-K	26-000031
20	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$792.3M	2024-12-31	2026-02-26	10-K	26-000031
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$750.3M	2023-12-31	2026-02-26	10-K	26-000031
22	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$766.6M	2022-12-31	2025-02-27	10-K	25-000040
23	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$3.5M	2025-12-31	2026-02-26	10-K	26-000031
24	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$183.9M	2024-12-31	2026-02-26	10-K	26-000031
25	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$1.2M	2024-12-31	2026-02-26	10-K	26-000031
26	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$138.3M	2023-12-31	2026-02-26	10-K	26-000031
27	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$1.0M	2023-12-31	2026-02-26	10-K	26-000031
28	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$146.8M	2022-12-31	2025-02-27	10-K	25-000040
29	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$4.0M	2022-12-31	2025-02-27	10-K	25-000040
30	current assets	us-gaap:AssetsCurrent	$659.3M	2024-12-31	2026-02-26	10-K	26-000031
31	current liabilities	us-gaap:LiabilitiesCurrent	$123.9M	2024-12-31	2026-02-26	10-K	26-000031
32	assets	us-gaap:Assets	$1.6B	2023-12-31	2025-02-27	10-K	25-000040
33	assets	us-gaap:Assets	$1.6B	2022-12-31	2024-02-29	10-K	24-000032

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