NU Skin Enterprises, Inc.

NUS

NYSE; shops; SIC 5122, Wholesale-Drugs, Proprietaries & Druggists' Sundries; CIK 0001021561

B/C

on the B/C boundary of 240 graded peers in shops

rank 97 of 240; percentile 40.2; sampling error 3.0 points; lower is stronger

A B C D E

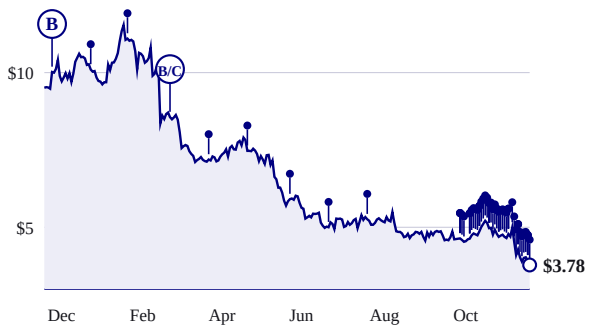
B/C, the elk



Scoreboard

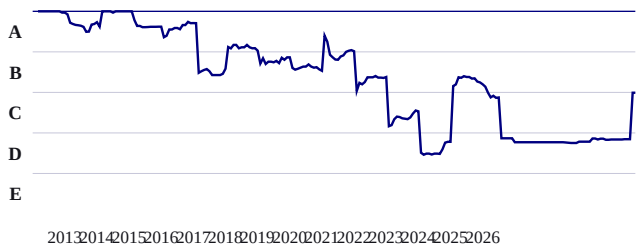
Profitability	C/D percentile 62.3
Solvency	A percentile 16.2
Growth and financing	C/D percentile 59.4
Reliability	0.91 AUC filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025
Peer failure rate	1.01% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$591M to $2.67B assets total assets $1.4B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered; fortress balance sheet
Inputs computable	10 of 13
Graded from	filings received through Feb 13, 2026 278 days before the rescan; latest periodic filing 10-Q received Nov 6, 2026
Last close	$3.80 2026-11-17; market equity $185.0M; 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 13, 2026

and Item 7. Management's Discussion and Analysis of Financial Condition and Results of Operations. Challenges to the form of our network marketing system or to our business practices have harmed and could continue to harm our business. We have been, and may be in the future, subject to challenges and inquiries by government regulators regarding the form of our network marketing system. Legal and regulatory requirements concerning the direct selling industry generally do not include "bright line" rules and are inherently fact-based and subject to interpretation.

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 62.3						
Gross profitability	73.4%	43.7%		15.7	224	2025-12-31
Return on invested capital	not computable	11.5%				

latest aligned inputs end 2015-12-31; latest annual assets end 2025-12-31

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Accruals ratio	5.6%	(4.9%)	97.0	269	2025-12-31
Gross margin stability, five years	2.4 pts	1.2 pts	74.3	203	2025-12-31
Solvency, sleeve percentile 16.2					
Altman Z double-prime	7.36	1.92	7.6	198	2025-12-31
Net debt to EBITDA	not computable	1.46x			
latest aligned inputs end 2015-12-31; latest annual assets end 2025-12-31					
Interest coverage	not computable	2.70x			
latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31					
Current ratio	2.08x	1.34x	24.8	275	2025-12-31
Growth and financing, sleeve percentile 59.4					
Revenue growth, three-year compound	(12.6%)	1.8%	91.2	251	2025-12-31
Free cash flow growth, three-year compound	(2.1%)	4.7%	67.2	138	2025-12-31
Reinvestment rate	44.7%	13.3%	31.2	142	2025-12-31
Asset growth, three years	(8.3%)	3.1%	82.9	252	2025-12-31
Net share issuance, one year	(3.2%)	(0.6%)	24.6	208	2026-01-31

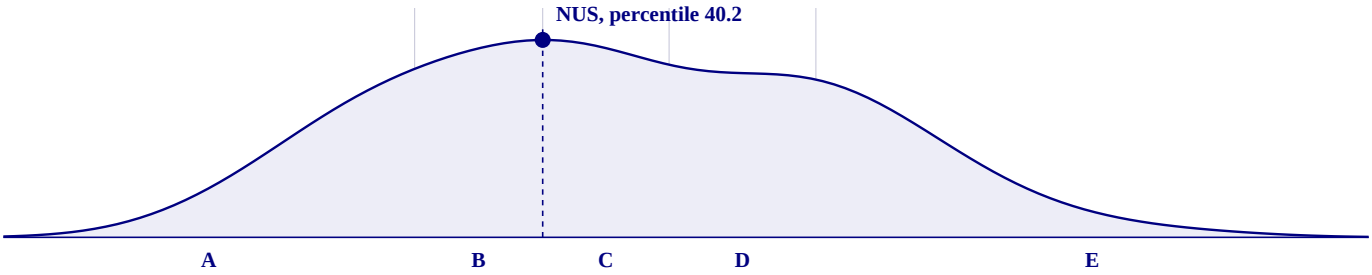
Warnings

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

Check	Measured
Fortress balance sheet	cash minus debt is 35,455,000 USD; Altman Z is not used

Among 240 peers

shops; 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
92	Dollar General Corp. (DG)	38.1	B/C	
93	YUM Brands Inc. (YUM)	38.5	B/C	
94	Natural Health Trends Corp. (NHTC)	38.9	B/C	
95	Sysco Corp. (SYY)	39.3	B/C	
96	Murphy USA Inc. (MUSA)	39.7	B/C	
97	NU Skin Enterprises, Inc. (NUS)	40.2	B/C	fortress balance sheet
98	Floor & Decor Holdings, Inc. (FND)	40.6	B/C	
99	Openlane, Inc. (OPLN)	41.0	B/C	
100	Dollar Tree, Inc. (DLTR)	41.4	B/C	
101	Wingstop Inc. (WING)	41.8	B/C	
102	TJX Companies Inc. (TJX)	42.3	B/C	

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	(56.2%)	(0.8%)	7
Distance from 52-week high	(67.2%)	(23.1%)	8
EBIT to enterprise value	24.1%	5.1%	99

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Free cash flow yield	25.0%	3.9%	97
Book value to price	2.98	0.36	95
Sales to price	8.07	1.61	89
Composite equity issuance, five years	(24.8%)	(17.1%)	31
Relative strength against the sector, log excess return	(0.74)	0.08	7
Twelve-month failure probability, CHS model	0.46%	0.04%	90

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 8 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	fail
Long-term leverage fell	pass
Current ratio improved	pass
No new shares issued	pass
Gross margin improved	pass
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$164.9M
Operating cash flow, four quarters	$15.2M
Months of runway	not finite
Days since last periodic filing	12 (10-Q received Nov 6, 2026)
Median daily dollar volume, 63 sessions	$2.3M

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	$1.0B	2025-12-31	2026-02-13	10-K	26-005130
2	assets	us-gaap:Assets	$1.4B	2025-12-31	2026-02-13	10-K	26-005130
3	operating income	us-gaap:OperatingIncomeLoss	$244.7M	2015-12-31	2018-02-16	10-K	18-000008
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$212.0M	2015-12-31	2016-02-18	10-K	16-000100
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$78.9M	2015-12-31	2018-02-16	10-K	18-000008
6	total debt	us-gaap:LongTermDebt	$253.9M	2015-12-31	2016-02-18	10-K	16-000100
7	book equity	us-gaap:StockholdersEquity	$825.6M	2015-12-31	2017-02-27	10-K	17-000019
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$289.4M	2015-12-31	2019-02-14	10-K	19-003087
9	total debt	us-gaap:LongTermDebt	$252.8M	2014-12-31	2015-03-02	10-K	15-000013
10	book equity	us-gaap:StockholdersEquity	$942.4M	2014-12-31	2016-02-18	10-K	16-000100
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$288.4M	2014-12-31	2018-02-16	10-K	18-000008
12	net income	us-gaap:NetIncomeLoss	$160.2M	2025-12-31	2026-02-13	10-K	26-005130
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$80.3M	2025-12-31	2026-02-13	10-K	26-005130
14	assets	us-gaap:Assets	$1.5B	2024-12-31	2026-02-13	10-K	26-005130
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.5B	2025-12-31	2026-02-13	10-K	26-005130
16	gross profit	us-gaap:GrossProfit	$1.2B	2024-12-31	2026-02-13	10-K	26-005130
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.7B	2024-12-31	2026-02-13	10-K	26-005130
18	gross profit	us-gaap:GrossProfit	$1.4B	2023-12-31	2026-02-13	10-K	26-005130
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$2.0B	2023-12-31	2026-02-13	10-K	26-005130
20	gross profit	us-gaap:GrossProfit	$1.6B	2022-12-31	2025-02-14	10-K	25-004907
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$2.2B	2022-12-31	2025-02-14	10-K	25-004907
22	gross profit	us-gaap:GrossProfit	$2.0B	2021-12-31	2024-02-15	10-K	24-008111
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$2.7B	2021-12-31	2024-02-15	10-K	24-008111
24	current assets	us-gaap:AssetsCurrent	$547.7M	2025-12-31	2026-02-13	10-K	26-005130

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25	current liabilities	us-gaap:LiabilitiesCurrent	$263.7M	2025-12-31	2026-02-13	10-K	26-005130
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$1.9B	2025-12-31	2026-02-13	10-K	26-005130
27	operating income	us-gaap:OperatingIncomeLoss	$65.8M	2025-12-31	2026-02-13	10-K	26-005130
28	book equity	us-gaap:StockholdersEquity	$805.2M	2025-12-31	2026-02-13	10-K	26-005130
29	liabilities	us-gaap:Liabilities	$600.1M	2025-12-31	2026-02-13	10-K	26-005130
30	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$71.4M	2015-12-31	2018-02-16	10-K	18-000008
31	operating income	us-gaap:OperatingIncomeLoss	$48.3M	2023-12-31	2026-02-13	10-K	26-005130
32	interest expense	us-gaap:InterestExpense	$25.6M	2023-12-31	2024-02-15	10-K	24-008111
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$34.3M	2025-12-31	2026-02-13	10-K	26-005130
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$111.7M	2024-12-31	2026-02-13	10-K	26-005130
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$41.6M	2024-12-31	2026-02-13	10-K	26-005130
36	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$118.6M	2023-12-31	2026-02-13	10-K	26-005130
37	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$58.5M	2023-12-31	2026-02-13	10-K	26-005130
38	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$108.1M	2022-12-31	2025-02-14	10-K	25-004907
39	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$59.1M	2022-12-31	2025-02-14	10-K	25-004907
40	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$52.3M	2025-12-31	2026-02-13	10-K	26-005130
41	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$196.2M	2025-12-31	2026-02-13	10-K	26-005130
42	income tax	us-gaap:IncomeTaxExpenseBenefit	$36.0M	2025-12-31	2026-02-13	10-K	26-005130
43	current assets	us-gaap:AssetsCurrent	$538.6M	2024-12-31	2026-02-13	10-K	26-005130
44	current liabilities	us-gaap:LiabilitiesCurrent	$296.6M	2024-12-31	2026-02-13	10-K	26-005130
45	assets	us-gaap:Assets	$1.8B	2023-12-31	2025-02-14	10-K	25-004907
46	assets	us-gaap:Assets	$1.8B	2022-12-31	2024-02-15	10-K	24-008111
47	shares outstanding	dei:EntityCommonStockSharesOutstanding	48,126,825	2026-01-31	2026-02-13	10-K	26-005130
48	shares outstanding	dei:EntityCommonStockSharesOutstanding	49,722,779	2025-01-31	2025-02-14	10-K	25-004907

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