authID Inc.

AUID

Nasdaq; business equipment; SIC 7372, Services-Prepackaged Software; CIK 0001534154

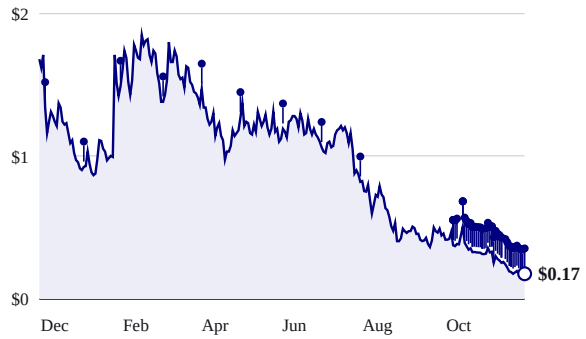
None

No letter

6 of 13 inputs computable; 7 are required, with a score in every sleeve

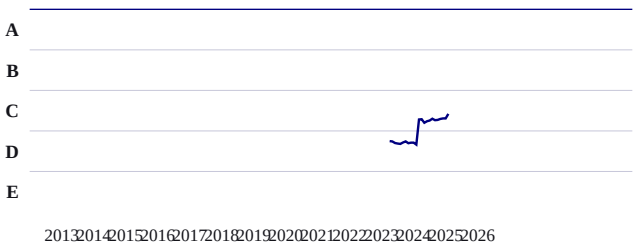
Scoreboard	
Reliability	0.76 AUC filers with under $12.5M assets; 95% interval 0.65 to 0.86; 63 events, 2020 to 2025
Peer failure rate	0.60% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	under $12.5M assets total assets $10.0M
Standard universe	outside revenue above $1M and assets above $10M
Warnings	dilution, thin data not computable: short runway, distress
Inputs computable	6 of 13
Graded from	filings received through Mar 31, 2026 233 days before the rescan; latest periodic filing 10-Q received Nov 12, 2026
Last close	$0.17 2026-11-18; market equity $2.8M; 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 31, 2026

Who's Behind the Device"TM for every customer or employee login and transaction, through its easy-to-integrate, patented, biometric identity platform. authID powers biometric identity proofing, biometric authentication, and account recovery with a fast, accurate, user-friendly experience. With our PrivacyKey? solution, authID provides highly accurate biometric authentication while storing no biometric data.

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 14.2						
Gross profitability	not computable	29.2%				
latest aligned inputs end 2019-12-31; latest annual assets end 2025-12-31						
Return on invested capital	not computable	11.0%				
pretax income must exceed the validity floor and imply a 0%-100% tax rate						

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Accruals ratio	(24.1%)	(7.4%)		14.2	566	2025-12-31
Gross margin stability, five years	not computable	2.3 pts				
five annual gross margins are required; found 2						
Solvency, sleeve percentile 59.5						
Altman Z double-prime	(65.35)	2.21		97.9	516	2025-12-31
Net debt to EBITDA	not computable	1.08x				
EBITDA must exceed $100,000						
Interest coverage	not computable	4.90x				
latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31						
Current ratio	4.16x	1.98x		21.2	600	2025-12-31
Growth and financing, sleeve percentile 51.0						
Revenue growth, three-year compound	57.0%	6.5%		4.4	502	2025-12-31
Free cash flow growth, three-year compound	not computable	17.5%				
four consecutive annual FCF observations are required; found 7						
Reinvestment rate	not computable	15.6%				
pretax income must exceed the validity floor and imply a 0%-100% tax rate						
Asset growth, three years	2.1%	5.0%		56.4	519	2025-12-31
Net share issuance, one year	47.7%	0.5%		92.3	405	2026-03-25

Warnings

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

Check	Measured
Dilution	split-adjusted year-over-year share growth is 47.7%
Thin data	6 of 13 grade factors are computable; minimum is 7

What the price implies

at the 2026-11-18 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(85.5%)	(2.2%)	3
Distance from 52-week high	(90.8%)	(37.2%)	5
EBIT to enterprise value	not computable	1.8%	
Free cash flow yield	(310.3%)	2.9%	2
Book value to price	(0.19)	0.28	3
Sales to price	0.72	0.33	69
Composite equity issuance, five years	not computable	4.3%	
Relative strength against the sector, log excess return	(2.20)	(0.29)	3
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	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	fail
Asset turnover improved	pass

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Cash, filings, liquidity	
Cash and equivalents	n/a
Operating cash flow, four quarters	n/a
Months of runway	not finite
Days since last periodic filing	7 (10-Q received Nov 12, 2026)
Median daily dollar volume, 63 sessions	$70,645

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:Revenues	$2.6M	2019-12-31	2021-03-08	10-K	21-013989
2	cost of revenue	us-gaap:CostOfRevenue	$669,523	2019-12-31	2020-03-30	10-K	20-007957
3	assets	us-gaap:Assets	$13.5M	2019-12-31	2021-03-08	10-K	21-013989
4	operating income	us-gaap:OperatingIncomeLoss	-$10.1M	2019-12-31	2021-03-08	10-K	21-013989
5	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$10.4M	2019-12-31	2021-03-08	10-K	21-013989
6	income tax	us-gaap:IncomeTaxExpenseBenefit	$62,931	2019-12-31	2021-03-08	10-K	21-013989
7	total debt	us-gaap:LongTermDebt	$2.0M	2019-12-31	2020-03-30	10-K	20-007957
8	book equity	us-gaap:StockholdersEquity	$8.3M	2019-12-31	2022-03-22	10-K	22-014214
9	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$567,081	2019-12-31	2021-03-08	10-K	21-013989
10	total debt	us-gaap:LongTermDebt	$2.0M	2018-12-31	2019-03-08	10-K	19-003800
11	book equity	us-gaap:StockholdersEquity	$14.6M	2018-12-31	2021-03-08	10-K	21-013989
12	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$5.0M	2018-12-31	2021-03-08	10-K	21-013989
13	net income	us-gaap:NetIncomeLoss	-$17.9M	2025-12-31	2026-03-31	10-K	26-037459
14	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$15.0M	2025-12-31	2026-03-31	10-K	26-037459
15	assets	us-gaap:Assets	$10.0M	2025-12-31	2026-03-31	10-K	26-037459
16	assets	us-gaap:Assets	$14.5M	2024-12-31	2026-03-31	10-K	26-037459
17	current assets	us-gaap:AssetsCurrent	$5.7M	2025-12-31	2026-03-31	10-K	26-037459
18	current liabilities	us-gaap:LiabilitiesCurrent	$1.4M	2025-12-31	2026-03-31	10-K	26-037459
19	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$191.7M	2025-12-31	2026-03-31	10-K	26-037459
20	operating income	us-gaap:OperatingIncomeLoss	-$18.2M	2025-12-31	2026-03-31	10-K	26-037459
21	book equity	us-gaap:StockholdersEquity	$8.6M	2025-12-31	2026-03-31	10-K	26-037459
22	liabilities	us-gaap:Liabilities	$1.4M	2025-12-31	2026-03-31	10-K	26-037459
23	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$790,367	2019-12-31	2021-03-08	10-K	21-013989
24	operating income	us-gaap:OperatingIncomeLoss	-$10.7M	2023-12-31	2025-03-13	10-K	25-023697
25	interest expense	us-gaap:InterestExpense	$1.1M	2023-12-31	2024-03-20	10-K	24-024363
26	revenue	us-gaap:Revenues	$2.0M	2025-12-31	2026-03-31	10-K	26-037459
27	revenue	us-gaap:Revenues	$886,485	2024-12-31	2026-03-31	10-K	26-037459
28	revenue	us-gaap:Revenues	$190,289	2023-12-31	2025-03-13	10-K	25-023697
29	revenue	us-gaap:Revenues	$527,415	2022-12-31	2024-03-20	10-K	24-024363
30	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$90,036	2021-12-31	2022-03-22	10-K	22-014214
31	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$1.2M	2021-12-31	2023-03-30	10-K	23-024677
32	operating income	us-gaap:OperatingIncomeLoss	-$17.1M	2021-12-31	2023-03-30	10-K	23-024677
33	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$16.7M	2021-12-31	2023-03-30	10-K	23-024677
34	income tax	us-gaap:IncomeTaxExpenseBenefit	$10,746	2021-12-31	2023-03-30	10-K	23-024677
35	current assets	us-gaap:AssetsCurrent	$6.9M	2021-12-31	2023-03-30	10-K	23-024677
36	current liabilities	us-gaap:LiabilitiesCurrent	$2.9M	2021-12-31	2023-03-30	10-K	23-024677
37	current assets	us-gaap:AssetsCurrent	$4.4M	2020-12-31	2022-03-22	10-K	22-014214
38	current liabilities	us-gaap:LiabilitiesCurrent	$2.9M	2020-12-31	2022-03-22	10-K	22-014214
39	assets	us-gaap:Assets	$15.4M	2023-12-31	2025-03-13	10-K	25-023697
40	assets	us-gaap:Assets	$9.4M	2022-12-31	2024-03-20	10-K	24-024363
41	shares outstanding	dei:EntityCommonStockSharesOutstanding	16,132,487	2026-03-25	2026-03-31	10-K	26-037459
42	shares outstanding	dei:EntityCommonStockSharesOutstanding	10,920,909	2025-03-10	2025-03-13	10-K	25-023697

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