PodcastOne, Inc.

PODC

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

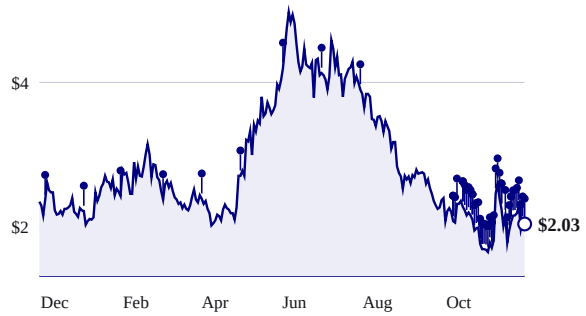
None

No letter

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

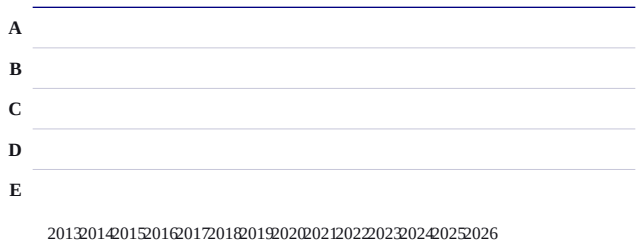
Scoreboard	
Reliability	0.83 AUC filers with $12.5M to $120M assets; 95% interval 0.79 to 0.86; 201 events, 2020 to 2025
Peer failure rate	1.07% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$12.5M to $120M assets total assets $29.2M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	late filer, thin data not computable: distress, fortress balance sheet
Inputs computable	5 of 13
Graded from	filings received through Jun 29, 2026 143 days before the rescan; latest periodic filing 10-Q received Nov 16, 2026
Last close	$2.02 2026-11-18; market equity $63.2M; 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 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 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 35.8						
Gross profitability	25.9%	29.2%		53.8	512	2026-03-31
Return on invested capital	not computable	11.0%				
one or more required annual facts are missing						

Accruals ratio	(20.2%)	(7.4%)	17.7	566	2026-03-31
Gross margin stability, five years	not computable	2.3 pts			
five annual gross margins are required; found 3					
Solvency, sleeve percentile 80.3					
Altman Z double-prime	(3.66)	2.21	74.6	516	2026-03-31
Net debt to EBITDA	not computable	1.08x			
one or more required annual facts are missing					
Interest coverage	not computable	4.90x			
latest aligned inputs end 2024-03-31; latest annual assets end 2026-03-31					
Current ratio	0.92x	1.98x	86.0	600	2026-03-31
Growth and financing, sleeve percentile 82.2					
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	17.5%			
four consecutive annual FCF observations are required; found 3					
Reinvestment rate	not computable	15.6%			
NOPAT must exceed $100,000					
Asset growth, three years	not computable	5.0%			
four annual observations are required; found 3					
Net share issuance, one year	14.2%	0.5%	82.2	405	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 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	3.1%	(2.2%)	55
Distance from 52-week high	(59.2%)	(37.2%)	25
EBIT to enterprise value	not computable	1.8%	
Free cash flow yield	3.8%	2.9%	58
Book value to price	0.40	0.28	62
Sales to price	0.97	0.33	74
Composite equity issuance, five years	not computable	4.3%	
Relative strength against the sector, log excess return	(0.24)	(0.29)	55
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 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
Gross margin improved	pass

Not investment advice. Informational and educational only. Data from SEC EDGAR, may contain errors, is not warranted. The grade ranks reported financial condition and is not a return forecast.

Asset turnover improved	pass

Cash, filings, liquidity

Cash and equivalents	$7.2M
Operating cash flow, four quarters	$377,000
Months of runway	not finite
Days since last periodic filing	3 (10-Q received Nov 16, 2026)
Median daily dollar volume, 63 sessions	$155,419

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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