Mangoceuticals, Inc.

MGRX

Nasdaq; healthcare; SIC 8090, Services-Misc Health & Allied Services, NEC; CIK 0001938046

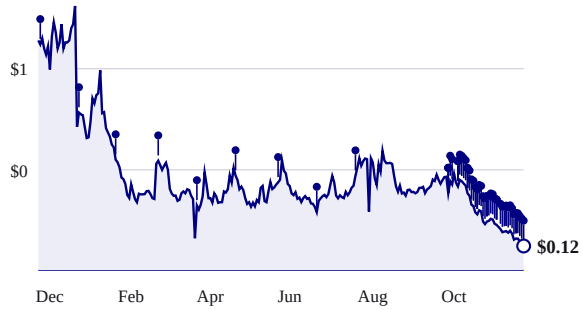
None

No letter

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

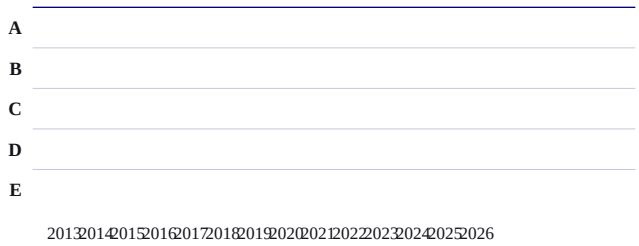
Scoreboard	
Reliability	0.83 AUC filers with $12.5M to $120M assets; 95% interval 0.79 to 0.86; 201 events, 2020 to 2025
Peer failure rate	1.07% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$12.5M to $120M assets total assets $16.1M
Standard universe	outside revenue above $1M and assets above $10M
Warnings	dilution, short runway, late filer, thin... not computable: distress, fortress balance sheet
Inputs computable	5 of 13
Graded from	filings received through Apr 1, 2026 234 days before the rescan; latest periodic filing 10-Q received Nov 16, 2026
Last close	$0.13 2026-11-20; 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 Apr 1, 2026

-Material Agreements-Master Services Agreement with Epiq Scripts". we have entered into a Master Services Agreement and SOW for Epiq Scripts, a related party, 52% owned and controlled by Jacob D. Cohen, our Chairman and Chief Executive Officer, to provide us pharmacy and compounding services. Epiq Scripts has filed with the URAC to obtain its pharmacy accreditation and has State Board of Pharmacy (or its equivalent) licenses in the District of Columbia and every U.S. state other than Alabama. It is also in the process of applying for a state license for Alabama and hopes to obtain that by the end of the first quarter of 2026.

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 47.0						
Gross profitability	1.6%	32.8%		90.7	346	2025-12-31
Return on invested capital	not computable	9.6%				
one or more required annual facts are missing						

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Accruals ratio	(94.0%)	(6.7%)	3.2	756	2025-12-31
Gross margin stability, five years	not computable	2.8 pts			
five annual gross margins are required; found 3					
Solvency, sleeve percentile 52.6					
Altman Z double-prime	2.42	0.31	27.7	705	2025-12-31
Net debt to EBITDA	not computable	1.82x			
one or more required annual facts are missing					
Interest coverage	not computable	(3.61x)			
one or more required annual facts are missing					
Current ratio	1.74x	2.68x	77.4	781	2025-12-31
Growth and financing, sleeve percentile 90.1					
Revenue growth, three-year compound	not computable	9.6%			
four annual observations are required; found 3					
Free cash flow growth, three-year compound	not computable	11.1%			
four consecutive annual FCF observations are required; found 1					
Reinvestment rate	not computable	33.9%			
one or more required annual facts are missing					
Asset growth, three years	not computable	3.2%			
four annual observations are required; found 3					
Net share issuance, one year	228.3%	1.6%	90.1	626	2026-03-31

Warnings

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

Check	Measured
Dilution	split-adjusted year-over-year share growth is 228.3%
Short runway	cash runway is 2.1 months
Late filer	found 2 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 2026-11-20 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(79.4%)	(1.7%)	5
Distance from 52-week high	(90.6%)	(33.0%)	5
EBIT to enterprise value	not computable	0.5%	
Free cash flow yield	(254.9%)	0.6%	3
Book value to price	4.03	0.29	97
Sales to price	0.17	0.38	27
Composite equity issuance, five years	not computable	13.5%	
Relative strength against the sector, log excess return	(1.75)	(0.19)	5
Twelve-month failure probability, CHS model	not computable	0.06%	

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	pass
Operating cash flow exceeds net income	pass
Long-term leverage fell	fail
Current ratio improved	pass

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No new shares issued	fail
Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$659,258
Operating cash flow, four quarters	-$3.8M
Months of runway	2.1
Days since last periodic filing	5 (10-Q received Nov 16, 2026)
Median daily dollar volume, 63 sessions	$116,049

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	$250,386	2025-12-31	2026-04-01	10-K	26-014478
2	assets	us-gaap:Assets	$16.1M	2025-12-31	2026-04-01	10-K	26-014478
3	net income	us-gaap:NetIncomeLoss	-$20.6M	2025-12-31	2026-04-01	10-K	26-014478
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$5.9M	2025-12-31	2026-04-01	10-K	26-014478
5	assets	us-gaap:Assets	$15.4M	2024-12-31	2026-04-01	10-K	26-014478
6	current assets	us-gaap:AssetsCurrent	$1.5M	2025-12-31	2026-04-01	10-K	26-014478
7	current liabilities	us-gaap:LiabilitiesCurrent	$890,568	2025-12-31	2026-04-01	10-K	26-014478
8	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$40.6M	2025-12-31	2026-04-01	10-K	26-014478
9	operating income	us-gaap:OperatingIncomeLoss	-$18.0M	2025-12-31	2026-04-01	10-K	26-014478
10	book equity	us-gaap:StockholdersEquity	$15.2M	2025-12-31	2026-04-01	10-K	26-014478
11	liabilities	us-gaap:Liabilities	$890,568	2025-12-31	2026-04-01	10-K	26-014478
12	revenue	us-gaap:Revenues	$456,021	2025-12-31	2026-04-01	10-K	26-014478
13	revenue	us-gaap:Revenues	$615,873	2024-12-31	2026-04-01	10-K	26-014478
14	revenue	us-gaap:Revenues	$731,493	2023-12-31	2025-03-20	10-K	25-000085
15	assets	us-gaap:Assets	$1.1M	2023-12-31	2025-03-20	10-K	25-000085
16	shares outstanding	dei:EntityCommonStockSharesOutstanding	16,967,420	2026-03-31	2026-04-01	10-K	26-014478
17	shares outstanding	dei:EntityCommonStockSharesOutstanding	5,168,796	2025-03-20	2025-03-20	10-K	25-000085

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