Realloys Inc.

ALOY

Nasdaq; other; SIC 1000, Metal Mining; CIK 0001567900

E

weakest fifth of 315 graded peers in other

rank 303 of 315; percentile 96.2; sampling error 2.7 points; lower is stronger

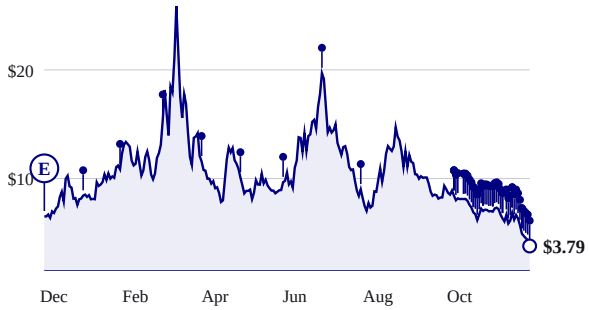
A B C D E

E, the bear



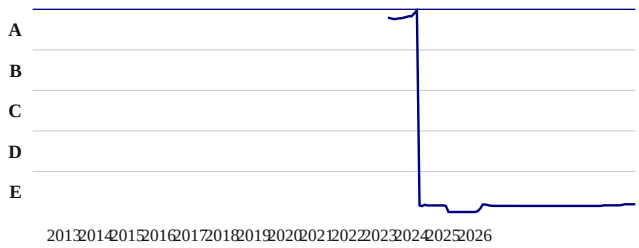
Scoreboard	
Profitability	C/D percentile 58.9
Solvency	E percentile 99.8
Growth and financing	D percentile 65.3
Reliability	0.76 AUC filers with under $12.5M assets; 95% interval 0.65 to 0.86; 63 events, 2020 to 2025
Peer failure rate	0.60% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	under $12.5M assets total assets $8.7M
Standard universe	outside revenue above $1M and assets above $10M
Warnings	late filer not computable: short runway, distress, fortress balance sheet
Inputs computable	7 of 13
Graded from	filings received through Feb 23, 2026 272 days before the rescan; latest periodic filing 10-Q received Nov 13, 2026
Last close	$3.79 2026-11-20; market equity $264.0M; 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 23, 2026

Blackbox has developed a financial technology and social media hybrid platform offering real-time proprietary analytics and news for stock and options traders of all levels combined with a social media element and educational materials. Our web-based platform and native iOS and Android applications (the "Blackbox System") employ "predictive technology" enhanced by artificial intelligence to find volatility and unusual market activity that may result in the rapid change in the price of a stock or option.

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 58.9						
Gross profitability	13.4%	26.7%		72.3	265	2025-12-31
Return on invested capital	not computable	10.0%				
one or more required annual facts are missing						
Accruals ratio	(13.6%)	(5.7%)		18.8	458	2025-12-31

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Gross margin stability, five years	9.5 pts	2.2 pts	85.6	195	2025-12-31
Solvency, sleeve percentile 99.8					
Altman Z double-prime	not computable	2.06			
required facts have no common fiscal period end					
Net debt to EBITDA	not computable	2.37x			
one or more required annual facts are missing					
Interest coverage	not computable	2.93x			
interest expense must exceed $100,000					
Current ratio	0.02x	1.33x	99.8	462	2025-12-31
Growth and financing, sleeve percentile 65.3					
Revenue growth, three-year compound	(21.1%)	4.9%	95.5	376	2025-12-31
Free cash flow growth, three-year compound	not computable	8.7%			
current FCF must be positive and base FCF must exceed $100,000					
Reinvestment rate	not computable	13.3%			
NOPAT must exceed $100,000					
Asset growth, three years	26.1%	4.1%	10.7	402	2025-12-31
Net share issuance, one year	24.4%	(0.5%)	89.8	354	2026-02-19

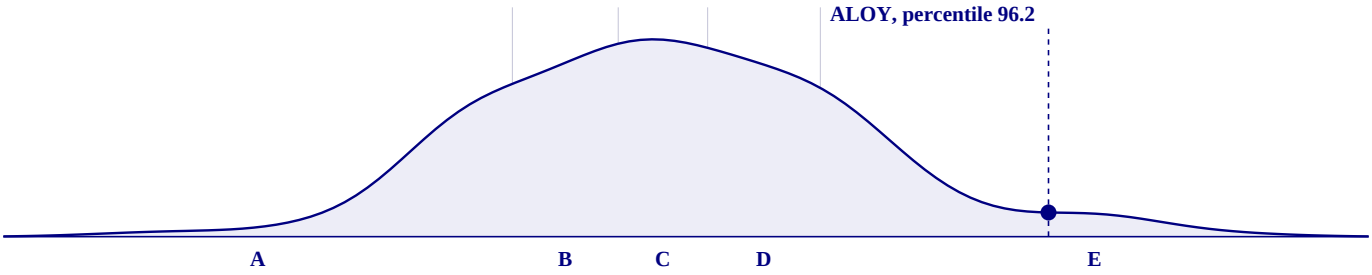
Warnings

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 315 peers

other; 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
298	Boxlight Corp. (BOXL)	94.6	E	dilution, late filer
299	MSG Knickerbockers Corp. (MSGK)	94.9	E	
300	CRA International, Inc. (CRAI)	95.2	E	
301	Altisource Portfolio Solutions S.A. (ASPS)	95.5	E	
302	Fluent, Inc. (FLNT)	95.9	E	dilution, late filer
303	Realloys Inc. (ALOY)	96.2	E	late filer
304	Jetblue Airways Corp. (JBLU)	96.5	E	
305	Reading International Inc. (RDI)	96.8	E	
306	Boyd Gaming Corp. (BYD)	97.1	E	
307	Future FinTech Group Inc. (FTFT)	97.5	E	dilution, short runway, late filer
308	iSpecimen Inc. (ISPC)	97.8	E	dilution, late filer, fortress balance sheet

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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	(14.0%)	0.4%	38
Distance from 52-week high	(85.4%)	(28.8%)	5
EBIT to enterprise value	not computable	4.6%	
Free cash flow yield	(0.3%)	4.1%	23
Book value to price	0.67	0.39	73
Sales to price	0.01	0.75	1
Composite equity issuance, five years	not computable	(9.5%)	
Relative strength against the sector, log excess return	(0.27)	(0.12)	38
Twelve-month failure probability, CHS model	not computable	0.04%	

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	fail
No new shares issued	fail
Gross margin improved	pass
Asset turnover improved	fail
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	9 (10-Q received Nov 13, 2026)
Median daily dollar volume, 63 sessions	$14.7M

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	$1.2M	2025-12-31	2026-02-23	10-K	26-005114
2	assets	us-gaap:Assets	$8.7M	2025-12-31	2026-02-23	10-K	26-005114
3	net income	us-gaap:NetIncomeLoss	-$4.4M	2025-12-31	2026-02-23	10-K	26-005114
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$3.2M	2025-12-31	2026-02-23	10-K	26-005114
5	assets	us-gaap:Assets	$9.9M	2024-12-31	2026-02-23	10-K	26-005114
6	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$2.4M	2025-12-31	2026-02-23	10-K	26-005114
7	gross profit	us-gaap:GrossProfit	$1.1M	2024-12-31	2026-02-23	10-K	26-005114
8	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$2.6M	2024-12-31	2026-02-23	10-K	26-005114
9	gross profit	us-gaap:GrossProfit	$1.4M	2023-12-31	2025-03-21	10-K	25-008773
10	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$3.1M	2023-12-31	2025-03-21	10-K	25-008773
11	gross profit	us-gaap:GrossProfit	$2.9M	2022-12-31	2024-04-01	10-K	24-010302
12	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$5.0M	2022-12-31	2024-04-01	10-K	24-010302
13	gross profit	us-gaap:GrossProfit	$4.3M	2021-12-31	2023-04-14	10-K	23-010333
14	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$6.1M	2021-12-31	2023-04-14	10-K	23-010333
15	operating income	us-gaap:OperatingIncomeLoss	-$1.1M	2018-12-31	2020-04-16	10-K	20-007802
16	interest expense	us-gaap:InterestExpense	$45,141	2018-12-31	2019-04-19	10-K	19-000088
17	current assets	us-gaap:AssetsCurrent	$69,740	2025-12-31	2026-02-23	10-K	26-005114

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18	current liabilities	us-gaap:LiabilitiesCurrent	$2.9M	2025-12-31	2026-02-23	10-K	26-005114
19	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$705,725	2024-12-31	2026-02-23	10-K	26-005114
20	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$0	2024-12-31	2025-03-21	10-K	25-008773
21	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$3.2M	2023-12-31	2025-03-21	10-K	25-008773
22	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$2,605	2023-12-31	2025-03-21	10-K	25-008773
23	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$4.3M	2022-12-31	2024-04-01	10-K	24-010302
24	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$65,941	2022-12-31	2024-04-01	10-K	24-010302
25	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$672,485	2021-12-31	2023-04-14	10-K	23-010333
26	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$63,912	2021-12-31	2023-04-14	10-K	23-010333
27	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$16,031	2024-12-31	2026-02-23	10-K	26-005114
28	operating income	us-gaap:OperatingIncomeLoss	-$3.3M	2024-12-31	2026-02-23	10-K	26-005114
29	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$3.5M	2024-12-31	2026-02-23	10-K	26-005114
30	income tax	us-gaap:IncomeTaxExpenseBenefit	$0	2024-12-31	2026-02-23	10-K	26-005114
31	current assets	us-gaap:AssetsCurrent	$1.2M	2024-12-31	2026-02-23	10-K	26-005114
32	current liabilities	us-gaap:LiabilitiesCurrent	$4.3M	2024-12-31	2026-02-23	10-K	26-005114
33	current assets	us-gaap:AssetsCurrent	$1.0M	2023-12-31	2025-03-21	10-K	25-008773
34	current liabilities	us-gaap:LiabilitiesCurrent	$2.2M	2023-12-31	2025-03-21	10-K	25-008773
35	assets	us-gaap:Assets	$9.8M	2023-12-31	2025-03-21	10-K	25-008773
36	assets	us-gaap:Assets	$4.3M	2022-12-31	2024-04-01	10-K	24-010302
37	shares outstanding	dei:EntityCommonStockSharesOutstanding	4,480,437	2026-02-19	2026-02-23	10-K	26-005114
38	shares outstanding	dei:EntityCommonStockSharesOutstanding	3,602,874	2025-03-20	2025-03-21	10-K	25-008773

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