Host Digital Inc.

HOST

NYSE; shops; SIC 5411, Retail-Grocery Stores; CIK 0001948864

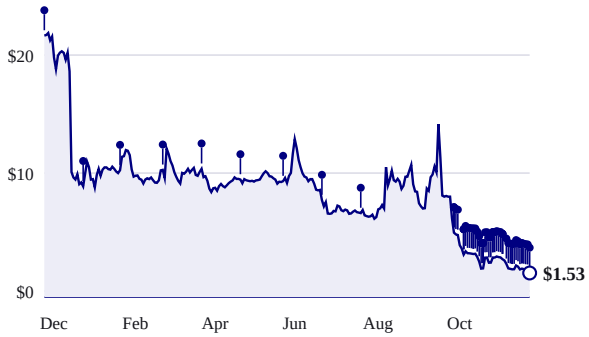
None

No letter

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

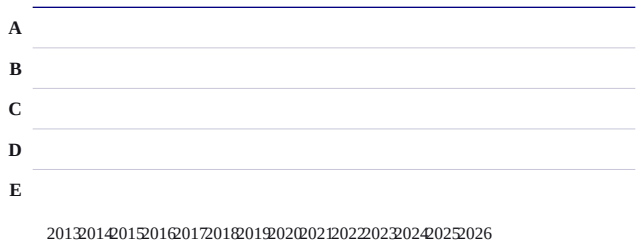
Scoreboard	
Reliability	0.83 AUC filers with $12.5M to $120M assets; 95% interval 0.79 to 0.86; 201 events, 2020 to 2025
Peer failure rate	1.07% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$12.5M to $120M assets total assets $33.5M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	dilution, short runway, thin data not computable: distress
Inputs computable	5 of 13
Graded from	filings received through Mar 16, 2026 251 days before the rescan; latest periodic filing 10-Q received Nov 16, 2026
Last close	$1.53 2026-11-20; market equity $43.3M; 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 16, 2026

Choice Wellness Corp. (the "Company" or "HCWC" or "we" or "our" or "us") is a holding company focused on providing consumers with healthier daily choices with respect to nutrition and other lifestyle alternatives. Choice Markets, Inc.

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 11.7						
Gross profitability	91.5%	43.5%		8.1	223	2025-12-31
Return on invested capital	not computable	11.5%				
one or more required annual facts are missing						
Accruals ratio	(14.6%)	(4.9%)		15.4	268	2025-12-31
Gross margin stability, five years	not computable	1.2 pts				
five annual gross margins are required; found 2						

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Solvency, sleeve percentile 80.1					
Altman Z double-prime	(1.19)	1.93	75.5	197	2025-12-31
Net debt to EBITDA	not computable	1.65x			
EBITDA must exceed $100,000					
Interest coverage	not computable	3.83x			
one or more required annual facts are missing					
Current ratio	0.79x	1.34x	84.6	274	2025-12-31
Growth and financing, sleeve percentile 95.6					
Revenue growth, three-year compound	not computable	1.8%			
four annual observations are required; found 2					
Free cash flow growth, three-year compound	not computable	5.2%			
four consecutive annual FCF observations are required; found 2					
Reinvestment rate	not computable	13.1%			
one or more required annual facts are missing					
Asset growth, three years	not computable	3.3%			
four annual observations are required; found 2					
Net share issuance, one year	115.3%	(0.6%)	95.6	206	2026-03-16

Warnings

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

Check	Measured
Dilution	split-adjusted year-over-year share growth is 115.3%
Short runway	cash runway is 4.6 months
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	(77.3%)	(0.5%)	2
Distance from 52-week high	(93.0%)	(25.1%)	2
EBIT to enterprise value	(6.0%)	5.5%	15
Free cash flow yield	1.6%	4.2%	29
Book value to price	1.00	0.40	79
Sales to price	1.81	1.70	52
Composite equity issuance, five years	not computable	(17.2%)	
Relative strength against the sector, log excess return	(1.39)	0.08	2
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	pass
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

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Cash, filings, liquidity	
Cash and equivalents	$900,000
Operating cash flow, four quarters	-$2.4M
Months of runway	4.6
Days since last periodic filing	6 (10-Q received Nov 16, 2026)
Median daily dollar volume, 63 sessions	$599,602

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	$30.7M	2025-12-31	2026-03-16	10-K	26-010208
2	assets	us-gaap:Assets	$33.5M	2025-12-31	2026-03-16	10-K	26-010208
3	net income	us-gaap:NetIncomeLoss	-$3.9M	2025-12-31	2026-03-16	10-K	26-010208
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$996,054	2025-12-31	2026-03-16	10-K	26-010208
5	assets	us-gaap:Assets	$34.1M	2024-12-31	2026-03-16	10-K	26-010208
6	current assets	us-gaap:AssetsCurrent	$10.0M	2025-12-31	2026-03-16	10-K	26-010208
7	current liabilities	us-gaap:LiabilitiesCurrent	$12.7M	2025-12-31	2026-03-16	10-K	26-010208
8	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$4.7M	2025-12-31	2026-03-16	10-K	26-010208
9	operating income	us-gaap:OperatingIncomeLoss	-$2.5M	2025-12-31	2026-03-16	10-K	26-010208
10	book equity	us-gaap:StockholdersEquity	$7.3M	2025-12-31	2026-03-16	10-K	26-010208
11	liabilities	us-gaap:Liabilities	$26.2M	2025-12-31	2026-03-16	10-K	26-010208
12	total debt	us-gaap:LongTermDebt	$7.3M	2025-12-31	2026-03-16	10-K	26-010208
13	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$3.0M	2025-12-31	2026-03-16	10-K	26-010208
14	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$1.7M	2025-12-31	2026-03-16	10-K	26-010208
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$78.2M	2025-12-31	2026-03-16	10-K	26-010208
16	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$69.4M	2024-12-31	2026-03-16	10-K	26-010208
17	shares outstanding	dei:EntityCommonStockSharesOutstanding	22,750,825	2026-03-16	2026-03-16	10-K	26-010208
18	shares outstanding	dei:EntityCommonStockSharesOutstanding	10,565,749	2025-03-27	2025-03-28	10-K	25-001000

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