

Beachbody Company, Inc. (BODI)

Nasdaq; shops; SIC 5960, Retail-Nonstore Retailers; CIK 0001826889

Beachbody Company, Inc.	
BODI; shops	
Grade	D/E A B C D E on the D/E boundary of 258 graded peers percentile 81.3; sampling error 2.9 points; lower is stronger
Rank	210 of 258
Profitability	B percentile 36.7
Solvency	C/D percentile 60.1
Growth and financing	E percentile 97.4
Reliability	0.87 AUC filers with \$120M to \$591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025
Peer failure rate	1.03% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	\$120M to \$591M assets total assets \$147.0M
Standard universe	inside revenue above \$1M and assets above \$10M
Warnings	none active; fortress balance sheet not computable: dilution, distress
Inputs computable	9 of 14
Graded from	filings received through Mar 10, 2026 213 days before the rescans; latest periodic filing 10-Q received Aug 10, 2026
Last close	\$4.68 2026-10-08; market equity \$0
Price used in grade	None



D/E, the sloth

on the D/E boundary of its sector; letters are fifths of the 258 graded peers

Share price, twelve months to the rescans

split-adjusted close; the letter is fixed at the rescans that set it



Rescans on file: E from Apr 21, 2025, D/E from Jul 21, 2026

Letter at every rescans

Jan 21, 2012 to Oct 9, 2026; sector percentile, 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 10, 2026

We are a leading fitness and nutrition company providing fitness, nutrition and stress-reducing programs to our customers. With 0.9 million digital subscriptions and 0.1 million nutritional subscriptions as of December 31, 2025, we believe our ability to offer solutions in both the global fitness market and the global nutrition market under one platform positions us as the leading holistic fitness and nutrition solution. For nearly three decades, we have created innovative exercise, nutrition and stress-reducing content that

have improved the lives of millions of customers.

The fourteen inputs

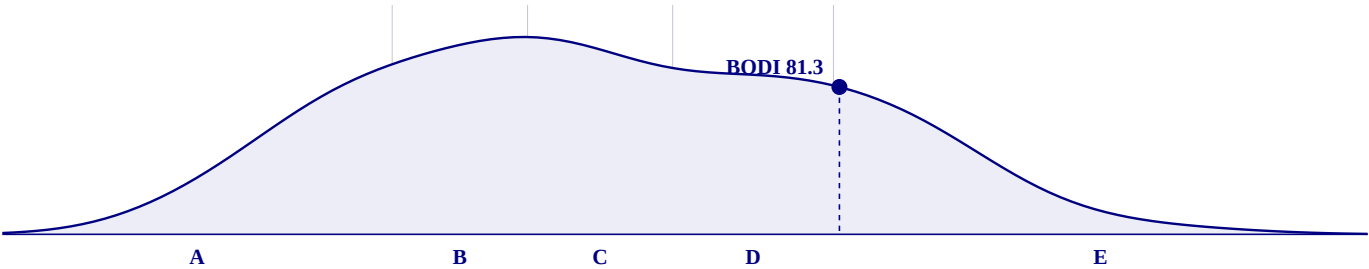
lower percentile is stronger; equal-weighted sleeves

Input	Percentile, 0 to 100	Value	Peer median	Percentile	Peers	Period end
Profitability, sleeve percentile 36.7						
Gross profitability		125.0%	42.6%	3.7	242	2025-12-31
Return on invested capital		not computable	10.9%			pretax income must exceed the validity floor and imply a 0%-100% tax rate
Accruals ratio		(15.3%)	(4.9%)	13.6	287	2025-12-31
Gross margin stability, five years		6.7 pts	1.2 pts	92.7	219	2025-12-31
Solvency, sleeve percentile 60.1						
Twelve-month failure probability		not computable	0.04%			firm-wide XBRL shares cannot be assigned to one ticker class
Altman Z double-prime		(14.81)	1.92	93.2	208	2025-12-31
Net debt to EBITDA		(0.99x)	1.84x	3.0	100	2025-12-31
Interest coverage		1.11x	2.26x	57.1	64	2025-12-31
Current ratio		0.74x	1.37x	87.1	295	2025-12-31
Growth and financing, sleeve percentile 97.4						
Revenue growth, three-year compound		(28.6%)	1.5%	97.4	269	2025-12-31
Free cash flow growth, three-year compound		not computable	5.6%			current FCF must be positive and base FCF must exceed \$100,000
Reinvestment rate		not computable	7.3%			pretax income must exceed the validity floor and imply a 0%-100% tax rate
Asset growth, three years		(30.8%)	3.4%	97.4	272	2025-12-31
Net share issuance, one year		not computable	(0.6%)			firm-wide XBRL shares cannot be assigned to one ticker class

Warnings

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

Check	Measured
Fortress balance sheet	cash minus debt is 14,017,000 USD; Altman Z is not used



Rank	Company	Percentile	Letter	Warnings
205	CVS Health Corp. (CVS)	79.4	D/E	
206	Martin Midstream Partners L.P. (MMLP)	79.8	D/E	
207	RCI Hospitality Holdings, Inc. (RICK)	80.2	D/E	late filer
208	Designer Brands Inc. (DBI)	80.5	D/E	
209	Leslie's, Inc. (LESL)	80.9	D/E	
210	Beachbody Company, Inc. (BODI) <	81.3	D/E	fortress balance sheet
211	Camping World Holdings, Inc. (CWH)	81.7	D/E	
212	Vestis Corp. (VSTS)	82.1	D/E	
213	GrowGeneration Corp. (GRWG)	82.5	D/E	fortress balance sheet
214	CDW Corp. (CDW)	82.9	D/E	
215	Carriage Services Inc. (CSV)	83.3	E	

What the price implies

at the 2026-10-08 close; none enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(1.2%)	(0.1%)	49
Distance from 52-week high	(71.3%)	(24.1%)	7
EBIT to enterprise value	not computable	5.3%	
Free cash flow yield	not computable	4.2%	
Book value to price	not computable	0.36	
Sales to price	not computable	1.75	
Composite equity issuance, five years	not computable	(16.7%)	
Relative strength against the sector, log excess return	0.01	0.02	49

Diagnostics

not in 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	pass
Operating cash flow exceeds net income	pass
Long-term leverage fell	fail
Current ratio improved	pass
No new shares issued	fail
Gross margin improved	pass
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	\$32.4M
Operating cash flow, four quarters	\$10.9M

Months of runway	not finite
Days since last periodic filing	60 (10-Q received Aug 10, 2026)
Median daily dollar volume, 63 sessions	\$193,279

Sources

each row links to the filing index on sec.gov

#	Concept	XBRL tag	Value	Period end	Received	Form	Accession
1	gross profit	us-gaap:GrossProfit	\$183.8M	2025-12-31	2026-03-10	10-K	0001193125-26-100284
2	assets	us-gaap:Assets	\$147.0M	2025-12-31	2026-03-10	10-K	0001193125-26-100284
3	operating income	us-gaap:OperatingIncomeLoss	\$5.5M	2025-12-31	2026-03-10	10-K	0001193125-26-100284
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraordinaryItemsNoncontrollingInterests	\$5.5M	2025-12-31	2026-03-10	10-K	0001193125-26-100284
5	income tax	us-gaap:IncomeTaxExpenseBenefit	\$125,000	2025-12-31	2026-03-10	10-K	0001193125-26-100284
6	total debt	us-gaap:LongTermDebt	\$25.0M	2025-12-31	2026-03-10	10-K	0001193125-26-100284
7	book equity	us-gaap:StockholdersEquity	\$31.3M	2025-12-31	2026-03-10	10-K	0001193125-26-100284
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$39.0M	2025-12-31	2026-03-10	10-K	0001193125-26-100284
9	total debt	us-gaap:LongTermDebt	\$21.6M	2024-12-31	2025-03-28	10-K	0000950170-25-046760
10	book equity	us-gaap:StockholdersEquity	\$28.2M	2024-12-31	2026-03-10	10-K	0001193125-26-100284
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$20.2M	2024-12-31	2026-03-10	10-K	0001193125-26-100284
12	net income	us-gaap:NetIncomeLoss	-\$2.9M	2025-12-31	2026-03-10	10-K	0001193125-26-100284
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$21.8M	2025-12-31	2026-03-10	10-K	0001193125-26-100284
14	assets	us-gaap:Assets	\$174.6M	2024-12-31	2026-03-10	10-K	0001193125-26-100284
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$251.7M	2025-12-31	2026-03-10	10-K	0001193125-26-100284
16	gross profit	us-gaap:GrossProfit	\$287.3M	2024-12-31	2026-03-10	10-K	0001193125-26-100284
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$418.8M	2024-12-31	2026-03-10	10-K	0001193125-26-100284
18	gross profit	us-gaap:GrossProfit	\$323.1M	2023-12-31	2025-03-28	10-K	0000950170-25-046760
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$527.1M	2023-12-31	2025-03-28	10-K	0000950170-25-046760
20	gross profit	us-gaap:GrossProfit	\$369.6M	2022-12-31	2024-03-11	10-K	0000950170-24-029409
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$692.2M	2022-12-31	2024-03-11	10-K	0000950170-24-029409
22	gross profit	us-gaap:GrossProfit	\$545.0M	2021-12-31	2023-03-16	10-K	0000950170-23-008487
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$873.6M	2021-12-31	2023-03-16	10-K	0000950170-23-008487
24	current assets	us-gaap:AssetsCurrent	\$63.8M	2025-12-31	2026-03-10	10-K	0001193125-26-100284
25	current liabilities	us-gaap:LiabilitiesCurrent	\$86.6M	2025-12-31	2026-03-10	10-K	0001193125-26-100284
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-\$646.4M	2025-12-31	2026-03-10	10-K	0001193125-26-100284
27	liabilities	us-gaap:Liabilities	\$115.7M	2025-12-31	2026-03-10	10-K	0001193125-26-100284
28	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	\$8.7M	2025-12-31	2026-03-10	10-K	0001193125-26-100284
29	interest expense	us-gaap:InterestExpense	\$5.0M	2025-12-31	2026-03-10	10-K	0001193125-26-100284
30	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$4.4M	2025-12-31	2026-03-10	10-K	0001193125-26-100284
31	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$2.6M	2024-12-31	2026-03-10	10-K	0001193125-26-100284
32	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$4.5M	2024-12-31	2026-03-10	10-K	0001193125-26-100284
33	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-\$22.5M	2023-12-31	2025-03-28	10-K	0000950170-25-046760
34	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$6.6M	2023-12-31	2025-03-28	10-K	0000950170-25-046760
35	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-\$47.2M	2022-12-31	2024-03-11	10-K	0000950170-24-029409
36	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$26.5M	2022-12-31	2024-03-11	10-K	0000950170-24-029409
37	current assets	us-gaap:AssetsCurrent	\$78.7M	2024-12-31	2026-03-10	10-K	0001193125-26-100284
38	current liabilities	us-gaap:LiabilitiesCurrent	\$127.6M	2024-12-31	2026-03-10	10-K	0001193125-26-100284
39	assets	us-gaap:Assets	\$276.8M	2023-12-31	2025-03-28	10-K	0000950170-25-046760
40	assets	us-gaap:Assets	\$443.4M	2022-12-31	2024-03-11	10-K	0000950170-24-029409