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Zacks Small-Cap Research

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Telomir Pharmaceuticals (TELO-NASDAQ)

TELO: Great Prospects and Solid Balance Sheet

Telomir is developing a treatment that has the potential to lead to the extension of human life and solve many age-related health issues. We value TELO at $12.15 using discounted cash flow analysis.

Current Price (02/04/25)	$4.51
Valuation	**$12.15**

OUTLOOK

Telomir Pharmaceuticals is a preclinical stage company focused on the science of lengthening telomere caps, which the company believes will extend human lifespans and improve quality of life as people age.

The company released its 2024 annual results, which shows an increase in research expenses and a much improved cash balance.

SUMMARY DATA

52-Week High	**$11.90**
52-Week Low	**$3.31**
One-Year Return (%)	**N/A**
Beta	**N/A**
Average Daily Volume (sh)	**100,660**
Shares Outstanding (mil)	**30**
Market Capitalization ($mil)	**$133**
Short Interest Ratio (days)	**N/A**
Institutional Ownership (%)	**0**
Insider Ownership (%)	**N/A**
Annual Cash Dividend	**$0.00**
Dividend Yield (%)	**0.00**
5-Yr. Historical Growth Rates	
Sales (%)	**N/A**
Earnings Per Share (%)	**N/A**
Dividend (%)	**N/A**

Risk Level	**High,**
Type of Stock	**Small-Growth**
Industry	**N/A**

ZACKS ESTIMATES

Revenue
(in millions of $)

	Q1 (Mar)	Q2 (Jun)	Q3 (Sep)	Q4 (Dec)	Year (Dec)
2023	0 A	0 A	0 A	0 A	0 A
2024	0 A	0 A	0 A	0 E	0 E
2025	0 E	0 E	0 E	0 E	0 E
2026	0 E	0 E	0.5 E	1.0 E	1.5 E

Earnings per share

	Q1 (Mar)	Q2 (Jun)	Q3 (Sep)	Q4 (Dec)	Year (Dec)
2023	NA	NA	NA	NA	-0.45 A
2024	-0.23 A	-0.06 A	-0.20 A	-0.07 A	-0.56 A
2025	-0.10 E	-0.10 E	-0.10 E	-0.10 E	-0.40 E
2026	-0.09 E	-0.10 E	-0.08 E	-0.09 E	-0.36 E

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UPDATE

Telomir Pharmaceuticals is a preclinical stage biopharmaceutical company developing a product designed to lengthen the DNA's protective telomere caps. Previously reported preclinical tests have shown evidence that Telomir-1, the company's primary therapy, can lengthen telomeres and initial animal testing illustrates the potential impact. In fact, the company recently released results from one of those tests, which, according to CEO Erez Aminov, "confirms Telomir-1 can reverse biologic aging, extending life while preserving health."

Company management just released its 2024 annual report that showed the company's progress in advancing their research, while also showing an improvement in the cash balance from the year ago period—a very positive development for a company at this stage.

The company also recently released potential groundbreaking results from a preclinical study of Telomir-1 on human cell lines. Data from the test showed the ability of Telomir-1 to "fully reverse copper-induced elevation of Reactive Oxygen Species (ROS) and provided robust cellular protection against copper toxicity."

Oxidative stress occurs when there is an imbalance between free radicals (ROS) and antioxidants in the body, leading to cellular damage. Free radicals are unstable molecules that can harm proteins, DNA, and cell membranes, while antioxidants help neutralize them. This imbalance can contribute to aging and is implicated in the development of various diseases. Oxidative stress plays a key role in chronic conditions such as cardiovascular diseases (e.g., atherosclerosis and hypertension), neurodegenerative disorders (e.g., Alzheimer's disease and Parkinson's disease), diabetes, cancer, and inflammatory diseases like rheumatoid arthritis. It is also linked to complications in conditions like chronic obstructive pulmonary disease (COPD) and kidney disease.

Telomir is evaluating Telomir-1 for the treatment of viral infections as well, such as avian influenza, otherwise known as bird flu, where oxidate stress is a key factor in disease severity. Viral infections trigger and exploit excessive ROS production as a mode to facilitate their replication, leading to widespread inflammation, cellular damage, and impaired immune responses. This oxidative damage exacerbates disease progression and increases the risk of severe outcomes.

According to the company, there are currently no approved drugs specifically targeting the oxidative stress caused by the bird flu or similar viruses. Telomir-1's ability to reverse oxidative stress and protect cells offers a promising avenue for addressing this gap. By mitigating the cellular damage associated with oxidative stress, Telomir-1 has the potential to play a critical role in reducing the severity of such infections.

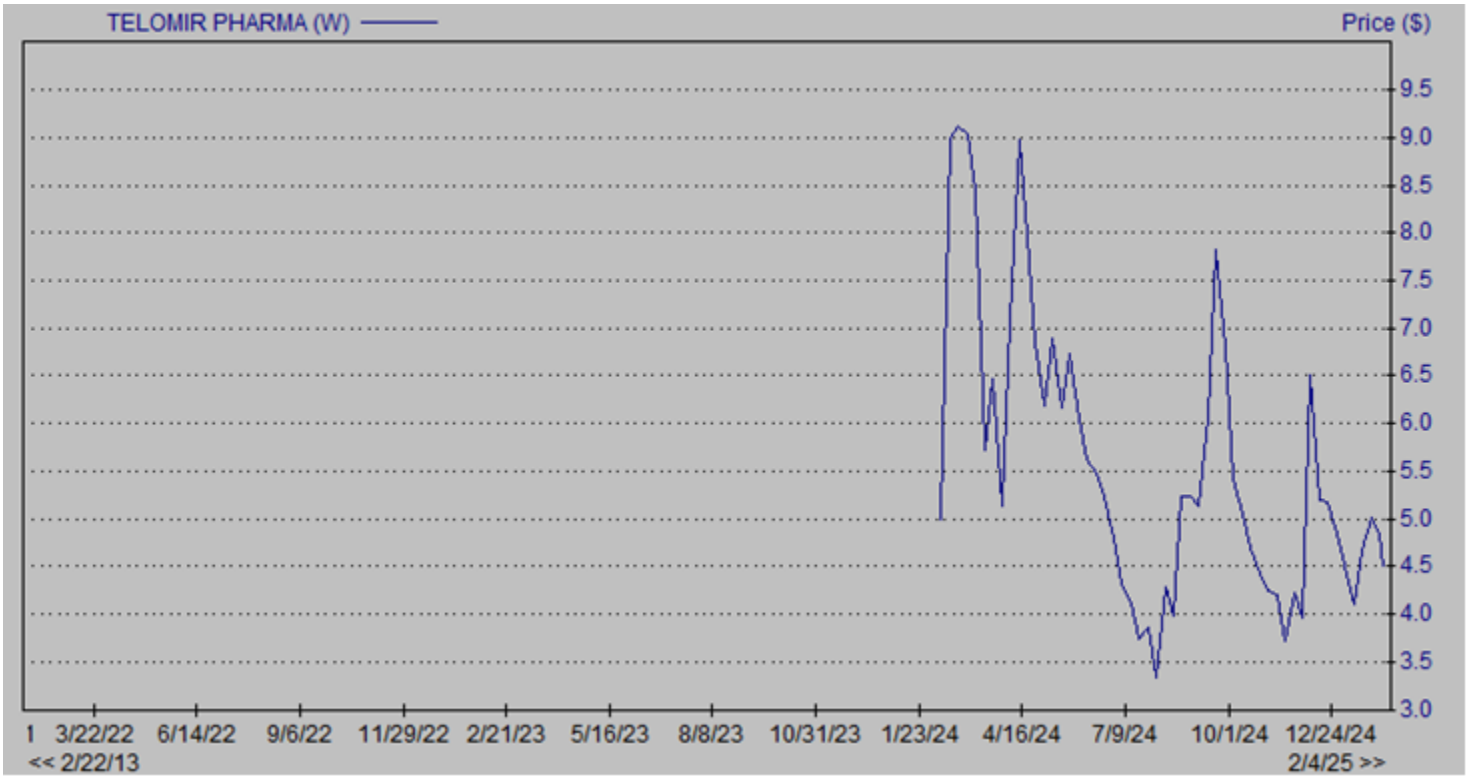
This announcement adds to the list of conditions that Telomir-1 has the potential to treat by attacking the underlying causes of the conditions and not just the symptoms. The company is continuing to zero in on all of the mechanisms that cause Telomir-1 to have these positive impacts and recently explained that Telomir-1 is designed to normalize iron homeostasis, reducing oxidative stress and improving insulin sensitivity, setting it apart from existing drugs that primarily treat symptoms without addressing these underlying causes. Excess iron levels contribute to oxidative stress, beta-cell damage, and insulin resistance across key tissues and reducing these levels could have a major impact on a wide variety of conditions.

It's this extensive experience and record of success, combined with the test results we've seen at this stage of the process that makes us get excited about the potential for Telomir-1 and the company that develops it. We urge investors who have a higher risk tolerance to take a look at TELO and consider investing in a company at an early stage that has a large potential upside, with a low float and positive news flow likely in the near future, providing potential fuel to the stock.

PROJECTED INCOME STATEMENT & BALANCE SHEET

Telomir Pharmaceuticals Income Statement and Balance Sheet							
	2023A	2024A	1Q 2525E	2Q2025E	3Q2025E	4Q2025E	2026E
Revenue	0	0	0	0	0	0	1,500,000
Operating Costs:							
General and Admistrative	(600,192)	(9,636,333)	(2,409,083)	(2,433,174)	(2,457,506)	(2,482,081)	(9,928,324)
Related party travel costs	(1,767,550)	(370,500)	0	0	0	0	0
Research and Development	(1,574,306)	(2,235,341)	(558,835)	(627,434)	(639,983)	(652,782)	(2,611,129)
Total Operating Gain/(Loss)	(3,942,048)	(12,242,174)	(2,967,919)	(3,060,608)	(3,097,489)	(3,134,863)	(11,039,453)
Interest Income/(expenses)	(1,643,049)	(4,290,542)	25,493	15,445	15,599	15,755	63,022
Loss on extingushment of debt	(7,486,767)	0	0	0	0	0	0
Other Income/(Expenses)	-	-	-	-	-	-	-
Net Gain/(Loss)	(13,071,864)	(16,532,716)	(2,942,426)	(3,045,163)	(3,081,889)	(3,119,108)	(10,976,431)
Diluted loss per share	(0.45)	(0.56)	(0.10)	(0.10)	(0.10)	(0.10)	(0.36)
Diluted Wtd Common Shares Outstanding	29,017,857	29,539,219	29,609,814	29,609,814	29,905,912	30,204,971	30,507,021
Assets							
Current Assets							
Cash and cash equivalents	1,231	1,266,131	1,883,909	834,638	842,984	851,414	859,928
Other Assets	433,994	57,874	217,813	207,347	209,420	211,515	213,630
Total Current Assets	435,225	1,324,005	2,101,722	1,041,985	1,052,405	1,062,929	1,073,558
Long Term Assets	4,338,543	-	-	-	-	-	-
Total Assets	4,773,768	1,324,005	2,101,722	1,041,985	1,052,405	1,062,929	1,073,558
Current Liabilities							
Trade accounts payable	707,187	587,536	393,814	506,479	349,471	241,135	166,383
Other Current Liabilities	628,377	93,432	140,341	93,432	94,366	95,310	96,263
Total Current Liabilities	1,335,564	680,968	534,155	599,911	443,837	336,445	262,646
Long-term Liabilities	-	-	-	-	-	-	-
Total Liabilities	1,335,564	680,968	534,155	599,911	443,837	336,445	262,646
Common Stock	-	-	-	-	-	-	-
Additional Paid-in Capital	17,502,346	31,239,895	23,335,319	28,140,559	28,421,965	28,706,184	28,993,246
Accumulated Deficit	(14,064,142)	(30,596,858)	(21,767,752)	(27,698,485)	(27,813,397)	(27,979,700)	(28,182,334)
Total SH deficit/(equity)	3,438,204	643,037	1,567,567	442,074	608,568	726,484	810,912
Total Liabilities and SH deficit/(equity)	4,773,768	1,324,005	2,101,722	1,041,985	1,052,405	1,062,929	1,073,558

HISTORICAL STOCK PRICE



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