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Zacks Small-Cap Research

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Telomir Pharmaceuticals (TELO-NASDAQ)

TELO: Test Results Open Huge Market Potential

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 $15.25 using discounted cash flow analysis.

Current Price (02/20/25)	$4.18
Valuation	**$15.25**

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 test results that showed Telomir-1 captured and stabilized the highly reactive Silver(II) in a biologically compatible form. This creates the potential for entry into a multi-billion-dollar market.

SUMMARY DATA

52-Week High	**$9.14**
52-Week Low	**$3.31**
One-Year Return (%)	**-53.09**
Beta	**N/A**
Average Daily Volume (sh)	**114,979**
Shares Outstanding (mil)	**30**
Market Capitalization ($mil)	**$124**
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."

The company continues to learn about the potential uses for Telomir-1 and just announced that it successfully captured and stabilized both Silver(I) (Ag^{+}) and the highly reactive Silver(II) (Ag^{2+}) in a biologically compatible form. As you probably know, silver has long been used in medicine due to its antimicrobial effects. Silver(II) (Ag^{2+}) is a rare oxidation state of silver, as silver typically exists in the +1 oxidation state Silver(I) (Ag^{+}). While Silver(I) compounds have demonstrated strong antibacterial activity, Silver(II) offers enhanced healing potential due to its greater oxidative capacity, broader bactericidal activity, and potential role in tissue regeneration. This is a significant development as some methods have briefly stabilized Silver(II) in lab conditions, those approaches are not viable for biological applications.

The ability to harness the abilities of Silver(II) has an enormous potential impact, including:

- Increased Oxidizing Power – Ag^{2+} is a stronger oxidizing agent than Ag^{+}, which could make it more effective at disrupting bacterial cell membranes, proteins, and DNA, potentially leading to enhanced antimicrobial activity.

- Broader Antimicrobial Spectrum – Due to its higher oxidation state, Silver(II) could potentially be more effective against antibiotic-resistant bacteria, fungi, and viruses, providing a more comprehensive antimicrobial solution.

- Lower Required Dosage – Stronger reactivity might allow for lower doses of Ag^{2+} to achieve the same or better antimicrobial effects compared to Ag^{+}, reducing toxicity concerns and minimizing environmental impact.

- Potential for Catalytic Action – Unlike Ag^{+}, which acts as a static antimicrobial agent, Ag^{2+} might participate in redox cycling, continuously regenerating its active form and prolonging its effectiveness.

- Greater Biofilm Disruption – Silver resistance is partly due to biofilm formation. The stronger oxidative properties of Ag^{2+} might enhance its ability to penetrate and disrupt bacterial biofilms more effectively than Ag^{+}.

While at the beginning stages of discovery, this development has a large economic potential, with the antimicrobial coatings market expected to grow to almost $34 billion by 2031 according to Verified Market Research. And according to the company's Chief Scientific Advisor, Dr. Itzchak Angel, "The ability to stabilize Silver(II) has been considered nearly impossible due to its extreme reactivity and rapid degradation. What we have achieved with Telomir-1 represents a significant leap forward in material science and medical chemistry. By stabilizing Silver(II) in a stable, biologically compatible form, we may

have unlocked the potential for a new class of therapeutics that could revolutionize topical antimicrobial treatments, wound healing, and infection control. This is more than just a scientific breakthrough—it is the first step toward potentially reshaping how silver-based medicine is used in modern healthcare."

As a result of this breakthrough and added market potential, we are raising our price target to $15.25, which we believe continues to be quite conservative given the numerous potential markets available for Telomir-1 to impact.

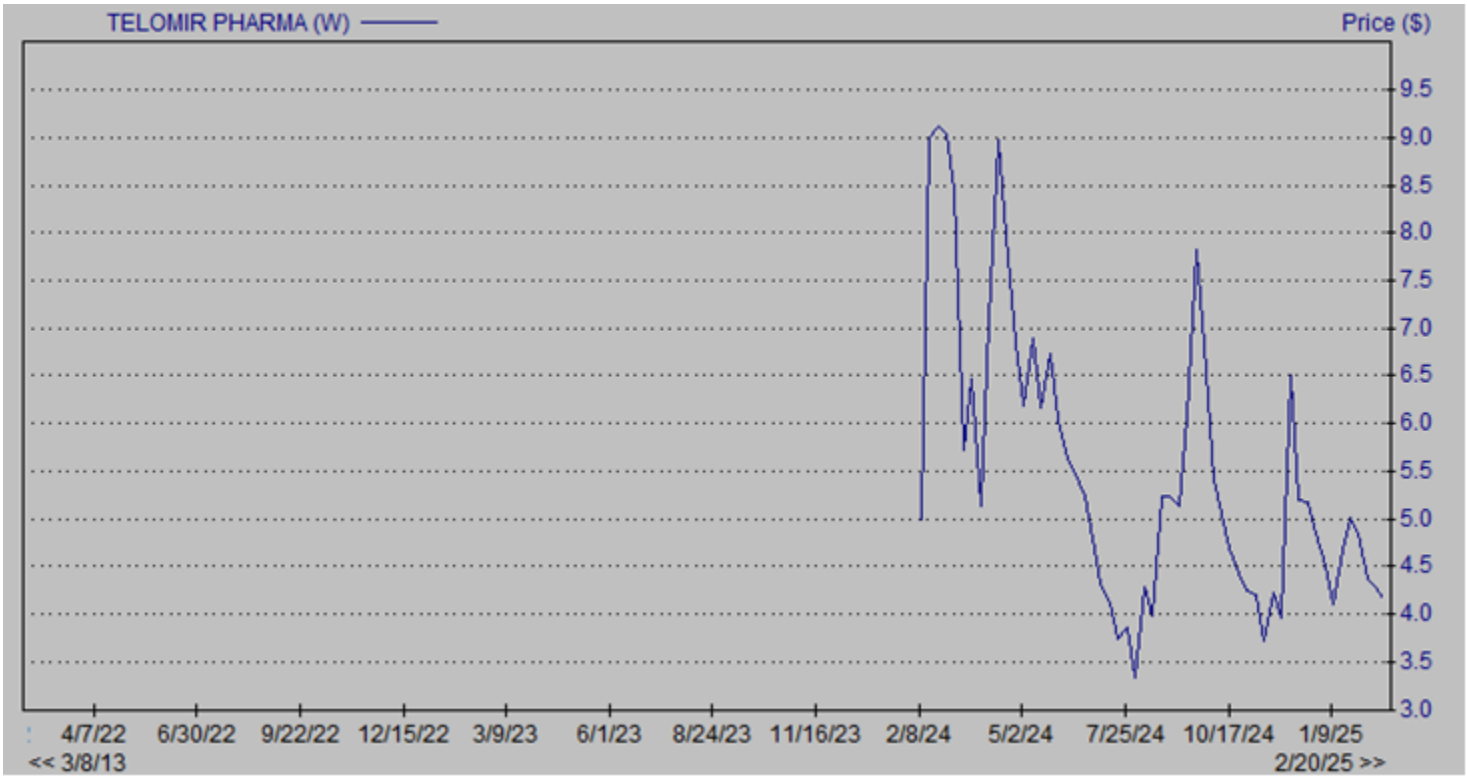
This announcement adds to the list of conditions that Telomir-1 has the potential to treat by attacking the underlying causes of the conditions and not just the symptoms. The company is continuing to zero in on all of the mechanisms that cause Telomir-1 to have these positive impacts and recently explained 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 to continue 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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