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Zacks Small-Cap Research

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Telomir Pharmaceuticals (TELO-NASDAQ)

TELO: New Discovery Offers Great Promise

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 (05/14/25)	$2.66
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 announced the identification of Telomir-Ag2 as a novel drug candidate for the treatment of bacterial infections. This discovery has the potential to be a new weapon in fighting drug-resistant pathogens.

SUMMARY DATA

52-Week High	**$7.84**
52-Week Low	**$2.48**
One-Year Return (%)	**-57.17**
Beta	**N/A**
Average Daily Volume (sh)	**128,908**
Shares Outstanding (mil)	**30**
Market Capitalization ($mil)	**$79**
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 A	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	-0.07 A	-0.08 E	-0.08 E	-0.08 E	-0.31 E
2026	-0.07 E	-0.07 E	-0.08 E	-0.06 E	-0.28 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 expand its potential portfolio and just announced that it had identified Telomir-Ag2 as a novel drug candidate for the treatment of bacterial infections. According to the company, Telomir-Ag2 is a stabilized Silver(II) complex that, in preclinical testing, showed broad-spectrum antimicrobial activity, including against MARSA (methicillin- and aminoglycoside-resistant *Staphylococcus aureus).* According to the CDC, MARSA is a drug-resistant variant responsible for infections in hospitals and in the US causes over 323,000 hospitalizations and more than 10,000 deaths per year. According to Verified Market Research the silver wound dressing market is expected to reach $1.36 billion by 2030, while the antimicrobial coatings market is expected to reach $33.7 billion by 2031.

It's obviously early in the process and the company plans on moving Telomir-Ag2 into formulation development and further studies, but the market potential for such a treatment is large and the need is urgent due to the stats listed above. The company noted that it will also look for potential partnerships in the areas of wound care, infectious disease, and medical devices—providing more potential benefit to shareholders of TELO.

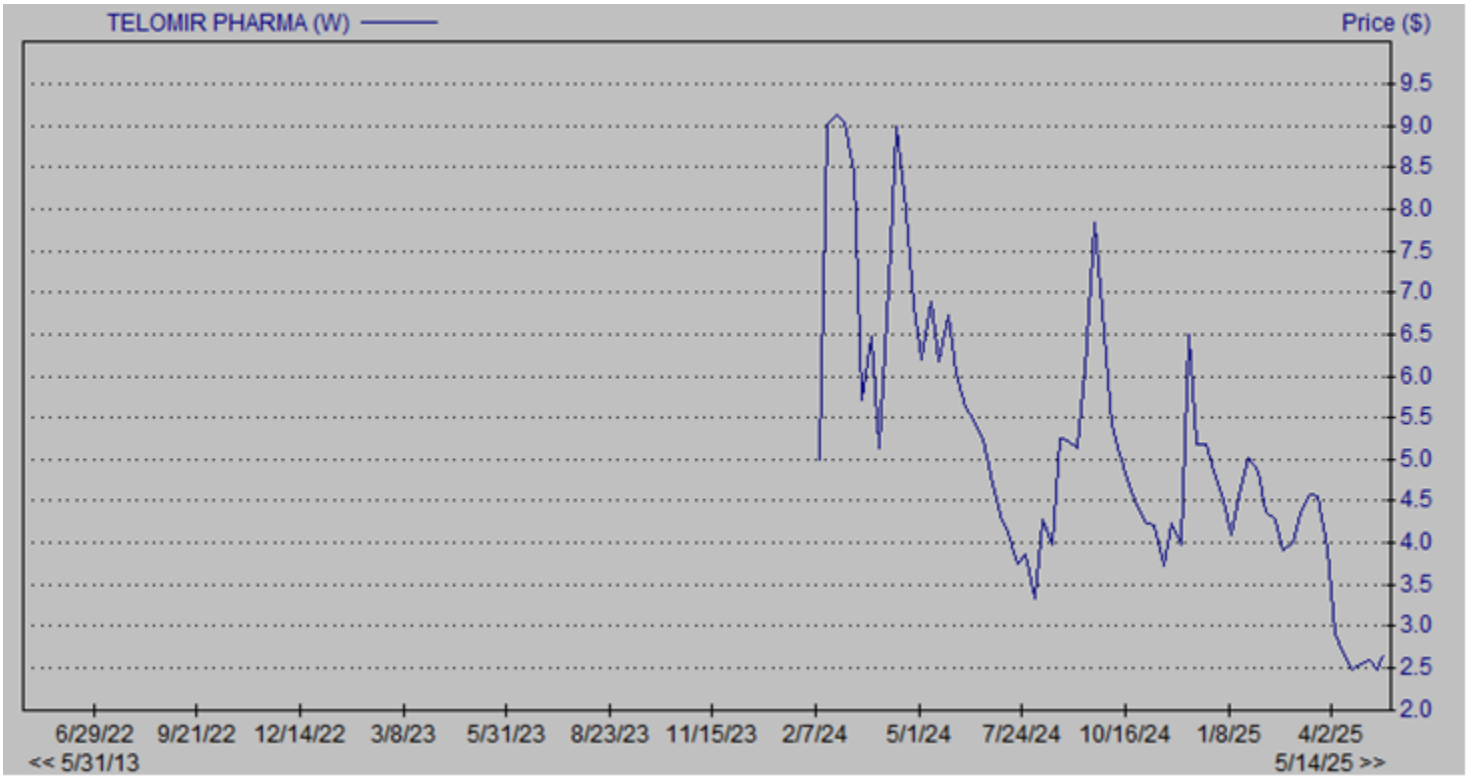
This announcement adds to the portfolio at Telomir and adds to the list of conditions that the company can address. As we've noted before, Telomir-1 has the potential to treat various conditions by attacking the underlying causes of the conditions and not just the symptoms. The company is continuing 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 excited about the potential for Telomir-1 and Telomir-Ag2 and the company that develops them. 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 2525A	2Q2025E	3Q2025E	4Q2025E	2026E
Revenue	0	0	0	0	0	0	1,500,000
Operating Costs:							
General and Admistrative	(600,192)	(9,636,333)	(1,850,786)	(1,869,294)	(1,887,987)	(1,906,867)	(7,627,467)
Related party travel costs	(1,767,550)	(370,500)	0	0	0	0	0
Research and Development	(1,574,306)	(2,235,341)	(336,996)	(627,434)	(639,983)	(652,782)	(2,611,129)
Total Operating Gain/(Loss)	(3,942,048)	(12,242,174)	(2,187,782)	(2,496,728)	(2,527,969)	(2,559,649)	(8,738,596)
Interest Income/(expenses)	(1,643,049)	(4,290,542)	7,954	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)	(2,179,828)	(2,481,283)	(2,512,370)	(2,543,894)	(8,675,574)
Diluted loss per share	(0.45)	(0.56)	(0.07)	(0.08)	(0.08)	(0.08)	(0.28)
Diluted Wtd Common Shares Outstanding	29,017,857	29,539,219	29,762,671	29,609,814	29,905,912	30,204,971	30,507,021
Assets							
Current Assets							
Cash and cash equivalents	1,231	1,266,131	402,999	834,638	842,984	851,414	859,928
Other Assets	433,994	57,874	88,189	207,347	209,420	211,515	213,630
Total Current Assets	435,225	1,324,005	491,188	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	491,188	1,041,985	1,052,405	1,062,929	1,073,558
Current Liabilities							
Trade accounts payable	707,187	587,536	558,862	506,479	349,471	241,135	166,383
Other Current Liabilities	628,377	93,432	93,432	93,432	94,366	95,310	96,263
Total Current Liabilities	1,335,564	680,968	652,294	599,911	443,837	336,445	262,646
Long-term Liabilities	-	-	-	-	-	-	-
Total Liabilities	1,335,564	680,968	652,294	599,911	443,837	336,445	262,646
Common Stock	-	-	-	-	-	-	-
Additional Paid-in Capital	17,502,346	31,239,895	32,615,580	28,140,559	28,421,965	28,706,184	28,993,246
Accumulated Deficit	(14,064,142)	(30,596,858)	(32,776,686)	(27,698,485)	(27,813,397)	(27,979,700)	(28,182,334)
Total SH deficit/(equity)	3,438,204	643,037	(161,106)	442,074	608,568	726,484	810,912
Total Liabilities and SH deficit/(equity)	4,773,768	1,324,005	491,188	1,041,985	1,052,405	1,062,929	1,073,558

HISTORICAL STOCK PRICE



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