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Telomir Pharmaceuticals (TELO-NASDAQ)

TELO: Preclinical Tests Show 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 \$15.50 using discounted cash flow analysis.

OUTLOOK

Telomir Pharmaceuticals is a preclinical stage company focused on reversing biological aging and degenerative diseases.

The company released 2Q2025 financial results that showed good cash on hand that should provide the fuel needed to begin clinical testing on Telomir-1 in the near future.

Current Price (08/14/25) **\$1.57**
Valuation **\$15.50**

SUMMARY DATA

52-Week High **\$7.84**
 52-Week Low **\$1.13**
 One-Year Return (%) **-61.24**
 Beta **-0.67**
 Average Daily Volume (sh) **7,834,336**

Shares Outstanding (mil) **30**
 Market Capitalization (\$mil) **\$47**
 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 A	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	-0.17 A	-0.07 E	-0.07 E	-0.38 E
2026	-0.07 E	-0.07 E	-0.08 E	-0.06 E	-0.28 E

UPDATE

Telomir Pharmaceuticals is a preclinical stage biopharmaceutical company developing a product designed to reverse biological aging and degenerative diseases. 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."

Preclinical test results recently released further confirm the CEO's statement and our belief in TELO. The company announced that a preclinical study showed that Telomir-1 restored mitochondrial function without triggering oxidative stress or cell proliferation in human cells derived from a patient with Hutchinson-Gilford Progeria Syndrome (HGPS). According to the company, Telomir-1 demonstrated a rare mitochondrial activity profile by selectively increasing mitochondrial energy production while simultaneously reducing reactive oxygen species (ROS). ROS is a damaging byproduct of oxidative metabolism. Importantly, and one of the major things that sets this treatment apart from other similar, treatment is that this restoration occurred without causing the cells to divide, a key safety consideration in genetically unstable or disease-compromised cells. The potential implications of this finding are numerous, and the results may be relevant to other diseases where mitochondrial failure, oxidative stress, and limited regenerative capacity contribute to progression, including Parkinson's disease, ALS (Amyotrophic Lateral Sclerosis), Alzheimer's disease, Werner's syndrome, and Progeria.

As with other conditions, Telomir-1 treats the underlying causes of progeria by regulating metal ions, reducing oxidative stress, restore mitochondrial function, extending telomere length, reversing muscle loss and resetting age-associated DNA methylation patterns. In contrast, the only current FDA-approved therapy for progeria, for example, has been shown to extend lifespan by an average of 4.3 years but does not reverse underlying disease pathology or halt cardiovascular decline—which remains the leading cause of death.

These results further indicate that Telomir-1 has the potential to reverse damage caused by a variety of aging-related conditions, which would be life-changing for millions of patients. Additionally, the company recently announced that it sold 1,100,000 shares of its common stock. Gross proceeds, according to the company, totaled approximately \$2.9 million, prior to deducting fees and expenses. This is another move by company management that will allow the important preclinical testing to be concluded, and clinical trials begin.

The company released 2Q2025 financial results that showed good cost discipline—although there was an increase in expenses due to some employee retention plans, which we understand and support. Additionally, the company has good cash on hand and no long-term debt, which should aid in getting clinical test on Telomir-1 started in the near future.

Finally, the company also recently announced results from preclinical animal testing that further illustrate the tremendous potential that Telomir-1 has in reversing many of the worst conditions related to aging. The tests were done on an animal model of Wilson's disease, which is a rare genetic disorder that can be fatal and is caused by mutation of genes that allow the body to eliminate excess copper. Patients suffering from this condition can experience inflammation, tissue damage, and multi-organ dysfunction.

In the trial, according to the company, Telomir-1 demonstrated the statistically significant reversal of major features of the disease, including:

- Up to a 4- to 5-fold reduction in episodic tremor events.
- Normalization of swim distance, swim velocity, and exploratory behavior.
- Reversal of ataxia-like motor behaviors (e.g., abnormal body bends and turn angles).
- Approximately 50% reduction in copper accumulation in dry liver tissue.
- Marked improvement in liver and kidney histopathology, with liver and kidney scores reduced to near-normal levels.
- Normalization of ALT, AST, and bilirubin—three critical liver biomarkers. ALT and AST are enzymes elevated during liver injury, while bilirubin builds up when detoxification is impaired. Telomir-1 restored these to wild-type levels, indicating protection of liver function and copper-induced damage.

These results continue the mounting evidence that Telomir-1 has the potential to have a major impact on the worst parts of the aging process, which would have an almost unlimited market potential. We continue to recommend investors take a look at TELO ahead of the human trials that are planned for early next year.

PROJECTED INCOME STATEMENT & BALANCE SHEET

Telomir Pharmaceuticals Income Statement and Balance Sheet								
	2023A	2024A	1Q 2025A	2Q2025A	3Q2025E	4Q2025E	2026E	
Revenue	0	0	0	0	0	0	0	1,500,000
Operating Costs:								
General and Administrative	(600,192)	(9,636,333)	(1,850,786)	(5,027,071)	(1,869,294)	(1,887,987)	(7,551,947)	
Related party travel costs	(1,767,550)	(370,500)	0	0	0	0	0	0
Research and Development	(1,574,306)	(2,235,341)	(336,996)	(42,839)	(343,736)	(350,611)	(1,402,443)	
Total Operating Gain/(Loss)	(3,942,048)	(12,242,174)	(2,187,782)	(5,069,910)	(2,213,030)	(2,238,597)	(7,454,390)	
Interest Income/(expenses)	(1,643,049)	(4,290,542)	7,954	20	20	20	82	
Loss on extinguishment 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)	(5,069,890)	(2,213,010)	(2,238,577)	(7,454,308)	
Diluted loss per share	(0.45)	(0.56)	(0.07)	(0.17)	(0.07)	(0.07)	(0.23)	
Diluted Wtd Common Shares Outstanding	29,017,857	29,539,219	29,762,671	30,010,165	31,110,165	31,421,267	31,735,479	
Assets								
Current Assets								
Cash and cash equivalents	1,231	1,266,131	402,999	754,323	1,641,175	1,394,998	1,185,749	
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	961,670	1,850,595	1,606,513	1,399,378	
Long Term Assets	4,338,543	-	-	-	-	-	-	
Total Assets	4,773,768	1,324,005	491,188	961,670	1,850,595	1,606,513	1,399,378	
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)	(25,198,485)	(25,821,939)	(26,421,838)	(26,994,378)	
Total SH deficit/(equity)	3,438,204	643,037	(161,106)	2,942,074	2,600,026	2,284,346	1,998,868	
Total Liabilities and SH deficit/(equity)	4,773,768	1,324,005	491,188	3,541,985	3,043,863	2,620,791	2,261,514	

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