

Using StageZero Life Sciences as a Case Study for the Publication of All Research Reports Online

Analyst Chris Thompson published a piece on eResearch on StageZero Life Sciences Ltd. (TSX: SZLS) this weekend titled, "StageZero Valuation Report Pegs Stock Price Between \$0.67 and \$14.14", the sub-header reads *Report Assumes Aristotle Revenue Impact Starting in Q3/2021*.

As the Publisher of InvestorIntel Corp., we are partial to Chris Thompson content as he is an outstanding guest columnist and knowledgeable host that occasionally shares his talents with InvestorIntel.com. Extensively educated (CFA, MBA, P.Eng) and experienced, if it was up to me I would like to publish all of Chris Thompson's eResearch reports in their entirety as they are released.

Does this mean I agree with him in his entirety? Hell, no. However, this is where I believe we need to remind the securities regulators that more and more of us are managing our own funds, and having access to more analysis is an example of the real tools we need to arm ourselves and evolve into the well equipped investors we want to be.

It simply makes sense. Why should we rely on savvy Reddit users when a well written report by a knowledgeable analyst can provide more comparative analysis than any chatboard debate can provide?

Presently, compliance regulations keeps both the companies and media from publishing analyst reports direct, and the companies these analysts cover cannot publish these reports on their sites, only the sources who have covered them. This

process forces the investor to hunt down these analysts and seek reports direct from the writing source, which they are allowed to distribute as they see fit.

Ideally, I wish that we as investors could source these reports on the exchanges where the company is trading so we can review all of them. And we, as media could compare them and provide what would undoubtedly make some great content for debate and discussion and shut down these boards where anonymity prospers. After all, the companies and the media cannot act so irresponsibly, why should these chatboards be able to do this?

This is one of the reasons why our discussions are monitored on InvestorIntel.com.

While I appreciate that judging the talents of an analyst goes well beyond their writing competency and their experience, and includes tracking their record for performance, it is my opinion that the best analysts should be allowed to receive a fan base once they prove a track record for doing this incredibly important job in the investment food chain.

More and more people are investing their own funds and managing their own money, when are we going to allow the retail audience to be equipped with the same tools as the professionals?

Please keep in mind that it is important to note that we as financial media, while allowed to report on these valuations, must be extraordinarily cautious to remind our readers that we are not licensed investment advisors and many of our comments must be limited to creative disclaimers to ensure that if the share price does not achieve the goals outlined in any valuation report that we have clearly stated that these numbers are not ours, but of the source cited and that we are neither liable or responsible.

But I believe (again, this is an opinion) that we do our

investors a disservice by not being able to have a place where all of the research is published so that we may follow how the analyst formed their conclusion.

This weekend I asked Chris Thompson to explain how he did this Valuation Report on StageZero. He responded with a very thorough summary, which I enjoyed and thought I would share with you.

Chris Thompson response to the StageZero Valuation Report process was to provide the following summary:

The Valuation Report use three valuation methodologies to calculate the price per share for StageZero: (1) Comparative Company Analysis using Revenue, (2) Prior Mergers and Acquisitions Analysis, and (3) Discounted Cash Flow.

Revenue from Aristotle® Fuels Valuation

StageZero is a life science and telehealth company that recently launched Aristotle®, which is its next generation, proprietary clinical test for the early detection of cancer.

Aristotle® is the first-ever multi-cancer panel that simultaneously screens for 10 cancers from a single sample of blood with high sensitivity and specificity for each cancer.

*StageZero commercially launched Aristotle® in April and, on the same day, announced the **acquisition** of Health Clinics and Care Oncology (HC Companies) to launch an early cancer diagnostic program under the trade name AVRT that is based on Aristotle®.*

Revenue Assumptions

In the valuation report, eResearch analyst Chris Thompson (me) assumed that StageZero's Aristotle® testing revenue will commence in the third quarter this year and StageZero will close the acquisition of the HC Companies in 2021.

In addition, StageZero's COVID-19 testing solutions generated revenue of over US\$6.5 million in the past three quarters, and I expect this revenue to continue for the rest of 2021.

From these assumptions, we estimated StageZero will generate US\$16.7 million of revenue in 2021 and will also book a one-year forward revenue of US\$23.0 million.

Stock Price Valuation Summary

eResearch used the one-year forward revenue estimate of US\$23.0 million as a baseline and estimated revenue growth and EBITDA margins for the next five years, as well as calculating revenue multiples from various sources, with all assumptions outlined in the valuation report.

The three valuations methods are summarized here and presented in the table below:

- 1. Revenue Multiples (3x to 12x revenue):** *eResearch estimated that StageZero's stock price should be in the range of C\$1.24 to C\$3.99.*
- 2. Prior Mergers & Acquisitions (1.2x to 45.x revenue):** *eResearch estimated that StageZero's stock price should be in the range of C\$0.67 to C\$14.14.*
- 3. Discounted Cash Flow (DCF) Method:** *eResearch estimated that StageZero's stock price should be C\$3.18 in one year.*

Overall, the calculations estimated StageZero's stock price valuation between C\$0.67 and C\$14.14.

Final Thoughts

With StageZero's recent C\$7.2 million financing strengthening its Balance Sheet and revenue from the COVID-19 testing bringing in additional cash flow, the company should have funds to complete the HC Companies acquisition and start commercializing Aristotle®.

StageZero closed Friday at C\$0.48 and currently has a Market Cap of less than C\$32 million.

The valuation estimates are well above StageZero's current stock price and illustrate the stock price's upside potential.

FIGURE 1: Summary of Stock Price Valuations

1-Year Forward Revenue Estimate (US\$M)	US\$23.0M	
	Price / Share (C\$)	
Revenue Multiples		
- Cdn Revenue Multiple	3x	C\$1.24
- US Median Revenue Multiple	12x	C\$3.99
Prior M&A		
- Low Revenue Multiple	1.1x	C\$0.67
- Median Revenue Multiple	11.6x	C\$3.87
- Average Revenue Multiple	45.3x	C\$14.14
DCF (1-Year Target Price)		C\$3.18
- Discount Rate of 10%		
- Terminal Multiple of 15x EBITDA in 2025		
- 2025E EBITDA of US\$21.1M		

So I must leave today's piece with a Disclaimer that we are not endorsing this Valuation Report and that StageZero is indeed an advertorial client for InvestorIntel Corp. To review the Disclaimers on this eResearch Valuation Report, please go the Source.

Note from the Publisher: We will continue to review ways in which we can provide regular updates on reports to cultivate discussion and debate on the reports, their writers and of course – the companies they are covering. **Thank you for visiting InvestorIntel.com!**

Dr. Charles Meakin on the benefits of StageZero Life Sciences early diagnostic cancer test

In a recent InvestorIntel interview, Tracy Weslosky speaks with Dr. Charles Meakin, Chief Medical Officer at CareOncology.com on how StageZero Life Sciences Ltd.'s (TSX: SZLS) early diagnostic cancer test will enhance the cancer treatment program that the Health Clinics offer their patients.

In this InvestorIntel interview, which may also be viewed on YouTube (click here to subscribe to the InvestorIntel Channel), Dr. Meakin went on to say that Care Oncology has developed a cancer treatment protocol that uses medicines that show 2-3 times increase in average median survival in cancer patients. He added, "We have treated over 5000 patients...our platform is very efficient and 80% of our patients re-enlist..." StageZero has developed the Aristotle® test which can simultaneously screen for 10 cancers from a single sample of blood with high sensitivity and specificity for each cancer. Dr. Meakin explained how StageZero and Care Oncology together can benefit cancer patients by combining early cancer diagnostics of StageZero and the cancer treatment protocol of Care Oncology.

To watch the complete interview, click here

About Health Clinics

Founded in London, England in 2013, Health Clinics specialises

in chronic inflammation and metabolic dysfunction and uses telemedicine to provide specialist clinical services across Europe and North America. HC provides two main clinical offerings:

1. Under the trade name Care Oncology Clinic (“COC”), HC provides a patented and safe adjunctive treatment for all cancer types;

2. Under the trade name AVRT (pronounced “avert”), HC clinicians will provide a managed clinical service to help people to reduce their risk of developing chronic diseases, including cancer, using a proportionate and tolerable protocol.

About StageZero Life Sciences, Ltd.

StageZero Life Sciences is dedicated to the early detection of multiple diseases through whole blood tests. The Company’s next-generation test, Aristotle®, is the first-ever multi-cancer panel for simultaneously screening for 10 cancers from a single sample of blood with high sensitivity and specificity for each cancer. StageZero’s full service, telehealth platform includes access to physicians and phlebotomists who can prescribe and draw samples for individuals and groups, and the Company operates a CAP accredited and CLIA certified high-complexity reference laboratory in Richmond, Virginia. In addition, leveraging its specialty in polymerase chain reaction (PCR) testing for the early identification of cancer through blood, StageZero also provides both COVID PCR testing (swab and saliva) and blood test analysis (Antibody testing).

To learn more about StageZero Life Sciences Ltd., [click here](#)

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Jack Lifton with StageZero's James Howard-Tripp on the advantages of non-invasive cancer diagnostic testing

In a recent InvestorIntel interview, Jack Lifton speaks with James Howard-Tripp, Chairman and CEO of StageZero Life Sciences Ltd. (TSX: SZLS) about StageZero's Aristotle® test for early cancer diagnosis and why the timing is right as the world prepares catch-up from the impact of COVID-19.

In this InvestorIntel interview, which may also be viewed on YouTube (click here to subscribe to the InvestorIntel Channel), James went on to discuss the marketing advantages surrounding StageZero and the Telehealth infrastructure for Aristotle®. Aristotle®, a test that can simultaneously screen for 10 cancers from a single sample of blood with high sensitivity and specificity for each cancer; was something Jack was particularly interested in exploring the competitive advantages for versus the more invasive testing processes. For instance, StageZero's proprietary mRNA technology platform that has been validated in more than 9,000 patients for colorectal cancer – the ColonSentry®, is such an example.

To watch the complete interview, click here

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Drolet Stock Notes on StageZero Life Sciences: Dedicated to the early detection of cancer and end-to-end COVID-19 testing solutions

Mario Drolet, President of MI3 Communications Financières Inc. (MI3), released his Drolet Stock Notes on StageZero Life Sciences Ltd. (TSX: SZLS) on May 20, 2021, for exclusive distribution on InvestorIntel. Highlights include:

- StageZero is dedicated to the early detection of cancer and multiple disease states through whole blood.
- Stage Zero has entered into a letter of intent to purchase substantially all of the business of Health Clinics Limited and of Health Clinics USA Corp. related to their current oncology business and expanding focus into early disease detection utilizing proprietary treatment protocols to ameliorate progression with end-to-end COVID-19 testing solutions.

- Expanded testing in Canada via the Company's partnership with Ichor Blood Services.
- Near **oversold** territory. Expecting a rebound. First target: \$0.88 to reintegrate 200DMA
- MI3 September 2021 Target: \$1.08
- Support: S3; \$0.45 S2; \$0.52 S1; \$0.57
Resistance: R1; \$0.60 R2; \$0.66 R3; \$0.72



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eResearch's Chris Thompson with James Howard-Tripp on StageZero's COVID-19 testing revenue

In a recent InvestorIntel interview, Chris Thompson speaks with James Howard-Tripp, Chairman and CEO of StageZero Life Sciences Ltd. (TSX: SZLS) about StageZero's COVID-19 testing revenue and Q1 financial results.

In this InvestorIntel interview, which may also be viewed on YouTube (click here to subscribe to the InvestorIntel Channel), James went on to say that StageZero, in its Q1 financial results, reported a "healthy revenue with more than

60% margin from COVID testing". He added that the company "has signed a series of long-term contracts" and expects the revenue to remain healthy for the rest of the year and will continue to build as revenues from Aristotle as part of the AVRT Program starts to come in. Touching on the recently announced Rexall partnerships to sell StageZero COVID-19 saliva test kits, James adds how the acquisition of Health Clinics Limited will create multiple revenue streams and make the launch of its multi-cancer test more impactful.

To watch the complete interview, [click here](#)

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**James Howard-Tripp on
StageZero’s Q1 Results,**

Aristotle as part of the AVRT Program and the Rexall Partnership for COVID-19 Saliva Tests

In a recent InvestorIntel interview, Tracy Weslosky spoke with James Howard-Tripp, Chairman and CEO of StageZero Life Sciences Ltd. (TSX: SZLS) about StageZero's first-quarter financial results, Aristotle as part of the AVRT Program and the Rexall Partnership for COVID-19 Saliva Tests.

In this InvestorIntel interview, which may also be viewed on YouTube (click here to subscribe to the InvestorIntel Channel), James went on to provide an update on the launch of Aristotle as part of the AVRT Program and StageZero's intent to acquire Health Clinics Limited. Unlike COVID-19 tests, cancer tests in the U.S. have to be prescribed by a physician. James explained how Health Clinics as "part and parcel" of StageZero will help them reach patients and have a bigger impact than trying to launch a stand-alone cancer-detection service. Driven by the goal "...to reduce the incidence of late-stage cancer by 50% over the next decade through early interventions", James said that the acquisition of Health Clinics will set StageZero in liquid biopsy, early detection of disease and telemedicine, three of the highest growth areas within healthcare right now.

To watch the complete interview, click here

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StageZero announces \$2.5 million in revenue from COVID-19 testing for Q1

StageZero Life Sciences Ltd. (TSX: SZLS) ("StageZero") has just announced mixed results for Q1, 2021. The good news was that StageZero generated \$2.5 million in revenue from COVID-19 testing for the quarter. The bad news was the \$7.3 million loss for the quarter.

The good news

Given StageZero has gone from zero to \$2.5 million in COVID-19 testing revenue in about a year shows StageZero's ability to quickly adapt and ramp up new services to meet patient's needs. The COVID-19 testing revenues are also helping to fund StageZero's expansion which includes the recent Aristotle 10-in-1 cancer test and potentially the Health Clinics Limited acquisition (Letter Of Intent signed and effective as of March 31, 2021). The other good news is that StageZero has built their cash levels up to \$6.4 million as of March 31, 2021.

The bad news

As per the Q1 2021 earnings announcement: “Net loss for the quarter totaled \$7.3 million...or \$0.08 loss per common share...The \$4.9 million increased loss results from the \$4.2 million impact of the revaluation of warrants, the \$0.7 million impact from the increase in cost of goods sold, the \$1.2 million impact from the increase in general and administrative costs, the \$1.4 million impact from the change in the fair value of the conversion debenture, offset by the \$0.2 million impact of a decrease in finance costs and the \$2.4 million impact of the increase in revenue.”

Most of this bad news was really just accountancy revaluation measures which are mostly a one-off related to the StageZero stock price movements, so longer term investors need not be alarmed.

StageZero is striving to become a leader in early stage cancer diagnosis using their Aristotle 10-in-1 cancer test

Stage Zero's Next Generation Test: 10 Cancers - One Sample of Blood - Unlimited Possibilities



The worst cancer diagnosis is a late one, yet more than 40% of cancers are still found in the later stages. Our next-generation blood test (Aristotle™) is a panel for the early detection of 10 cancers from a single sample of blood. Aristotle was recently selected for online publication at the 2020 annual meeting of the American Society of Clinical Oncology (ASCO).

Source

The big picture

The big picture for StageZero is still looking good. From an operational point of view StageZero is making very good progress. Here are the recent highlights:

- Aristotle launched as part of the AVRT Program.
- Announced intent to acquire Health Clinics Limited (transaction expected to close during

Q3 2021). Health Clinics will operate the trade name “Care Oncology Clinic”. Health Clinics provides a patented and safe adjunctive treatment for all cancer types.

- Expanded testing in Canada via the Company’s partnership with Ichor Blood Services.
- Hired further staff and expanded testing capacity for COVID-19 and Aristotle®.
- Partnership with Rexall to sell COVID 19 saliva test kits throughout Canada. Rexall is a leading drugstore operator with more than 400 pharmacies across Canada.
- Partnerships with additional Fortune 500 companies for COVID-19 testing.

Investors should take a mid to long term view towards StageZero. Establishing a niche cancer diagnosis and treatment business takes time and money. StageZero is currently still establishing itself in this area.

CEO Tripp summarized StageZero’s direction well when he stated:

“Together with Health Clinics, we are taking three of the highest growth areas within healthcare – liquid biopsy, early detection of disease and telemedicine – and combining them into one innovative company that with ground-breaking technology, will find disease early (as opposed to late and with presentation of symptoms), diagnose and treat, or diagnose and seek to prevent late stage disease, with a telemedicine reach in both North America and the UK/Europe.”

StageZero has made tremendous progress over the past year and is now in the stage of commercializing Aristotle after their 20 years of work developing it.

Closing remarks

The world is yet to see the full potential of both StageZero and their revolutionary 10-in-1 cancer test, ‘Aristotle’.

Diagnosing disease (especially cancer) early means giving patients a chance to alter the course of their disease, rather than fighting a losing battle against late-stage disease. This is potentially a game-changer for medicine and for patients in the battle against cancer and many other debilitating diseases.

StageZero Q1 2021 results do look to be a mixed bag at first glance. But looking deeper the loss is mostly accountancy issues and the growing revenues and tremendous progress in the direction the Company is heading means investors should remain very positive on the Company. If StageZero can succeed on their mission of diagnosing disease (especially cancer) early and then providing treatment (boosted via the health Clinics acquisition), then the world is their oyster.

StageZero Life Sciences trades on a market cap of just C\$43 million. The recent stock price dip allows a better entry for investors who see the potential of StageZero and who are prepared to take the long term view.

Disclosure: The author is long StageZero Life Sciences (TSX: SZLS).

Further learning

- **StageZero Life Sciences James Howard-Tripp on the recent LOI to Acquire Health Clinics Limited**