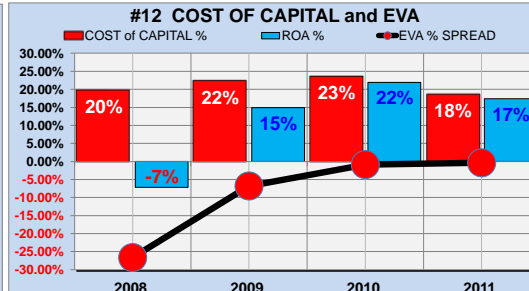
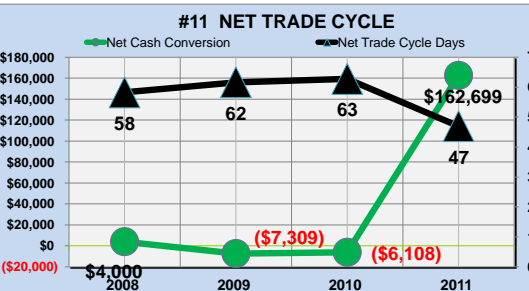
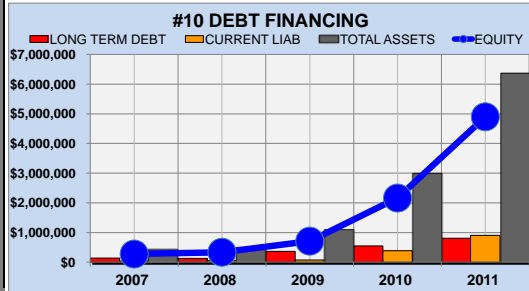
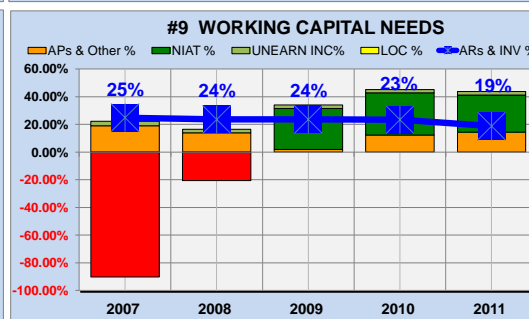
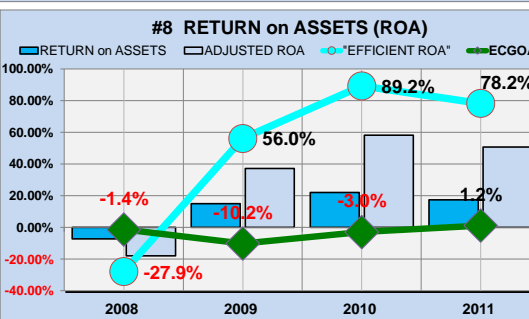
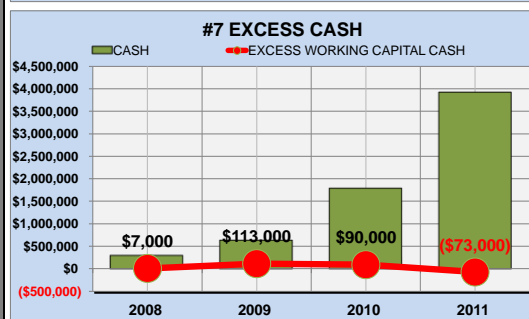
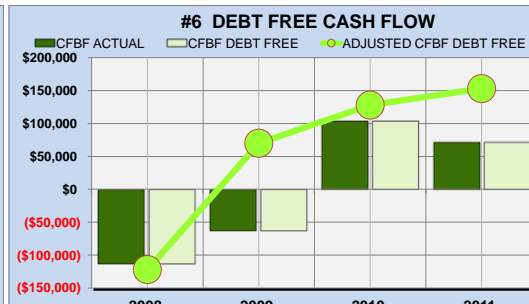
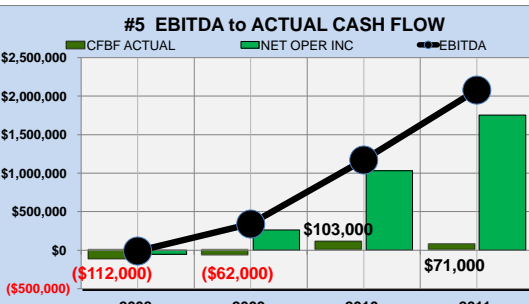
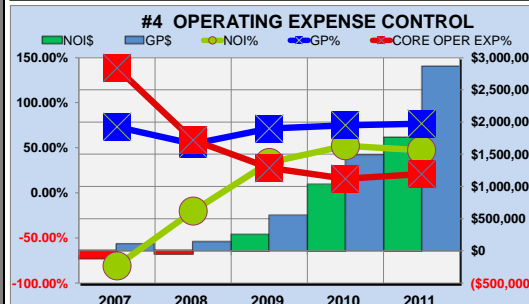
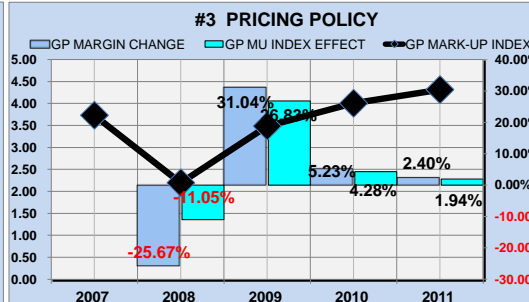
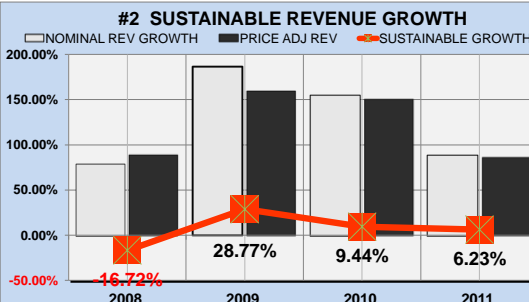
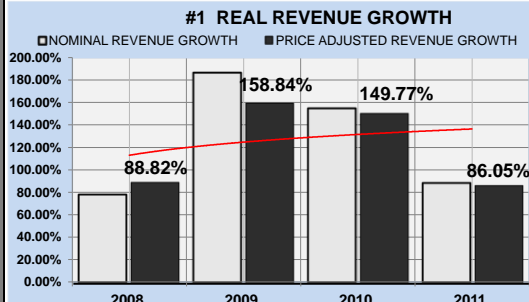


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REAL REVENUE GROWTH	#1	Real revenue growth shows the actual real increase or decrease year by year in the additional sales volume of services or products. Real revenue growth shows the annual growth in revenues adjusted for the effect of annual over-all increases or decreases in direct revenue pricing and the changes in the costs of goods sold through using the gross profit mark-up index. So the company's revenues change year by year due to changes in the volume of products or services, the changes in the pricing of products or services, and the changes in the costs of goods sold.		
SUSTAINABLE REVENUE GROWTH	#2	The annual change in retained earnings in relation to equity if you use debt financing or total assets (if no debt financing) tells one how fast or slow the revenues can change in the following year. Have you ever heard the term growing broke? That term means growing annual revenues so fast that they consume the resources of the balance sheet faster than they can be replenished. Where do additional resources primarily come from – from retained earnings or the portion of annual net income you leave in or reinvest in your business.		
PRICING POLICY	#3	We use the gross profit mark-up index to develop pricing policy. This index measures revenue divided by cost of goods sold, resulting in an index. The annual change in this index plus or minus shows the increase or decrease in over-all pricing. Real revenue growth as defined above is derived by subtracting the over-all pricing index from the nominal annual revenue change. For many companies it would be impossible to add up a bunch of widgets, compare to the prior year, and know how much more volume was produced. This can be daunting for even the well-organized firm. So this is how one can ferret out price increases or decreases over all year by year.		
OPERATING EXPENSE CONTROL	#4	Operating expenses are expressed as a percentage of revenues. This percentage is typically compared to net income margin or net income to revenues. Statistics are used to determine if the operating expenses are moving in or out of control and the magnitude of any change. These statistics will tell one how sustainable operating expense improvements really are. Core operating expenses are tracked in order to find different levels of economies of scale.		
EBITDA to ACTUAL CASH FLOW	#5	EBITDA means earnings before interest expense, taxes, annual depreciation expense and amortization. EBITDA is typically used by banks to assess the ability of a firm to pay back debt financing. EBITDA ignores several issues critical to any business. It ignores interest expenses, income taxes, annual changes in working capital, and annual capital expenditures to maintain the on-going viable business operation. Without making working capital investments and capital expenditures, the business would begin to decline and ultimately to fail. EBITDA is compared to annual cash flow before financing - <i>IT SHOULD NOT BE USED</i> for cash flow.		
DEBT FREE CASH FLOW	#6	Cash flow before financing with after tax interest expense added back shows a company's debt-free cash flow after tax. This is the most meaningful cash flow for any business and should be followed consistently and frequently. This number is what is followed to determine sustainable annual cash flow. This is the real driver of increasing business value without reservation. It is very difficult to game this figure which is another valuable characteristic of this metric.		
EXCESS CASH	#7	How a company manages its' cash is a critical job that most companies do not really understand. Poor cash management can harm the company's performance in subtle but serious ways. It lowers the return on assets and it increases the cost of capital. Holding excess cash dulls the company's operating edge which increases overall risk and produces overly confident management. When the cash balance exceeds the actual working capital cash balance need then that excess cash balance is unnecessary to the firm's financial operations. Increasing or decreasing excess cash balances is a leading indicator of future good or bad times for the company.		
RETURN on ASSETS (ROA)	#8	Assets means the firm's total assets. The return on assets is calculated as net income after tax plus after-tax interest expense added back in as net income. The result is divided by total assets to arrive at the Return on Assets (ROA). ROA can then be compared to other returns on investments with similar risk profiles. For instance, if your business is only returning 4% ROA compared to say the yield on a junk municipal bond at 6%, one would conclude that the business is probably underperforming for the risk taken to have all the assets tied up in an illiquid business operation.		
WORKING CAPITAL NEEDS	#9	Working capital is the interaction of the current assets and current liabilities. Accounts receivable and inventory (if applicable) are the main drivers of current assets and accounts payable and other payables are the main drivers of the current liabilities. The current liabilities fund to some extent the current assets. Mismatching the working capital will cause consistent and costly problems for the company. Knowing the potential need for capital in the working capital is an important metric for determining the future financing of the business whether short, medium, or long term.		
DEBT FINANCING	#10	The total debt or total liabilities will be different in each industry and with each business depending on the company's risk tolerance. Long term debt financing should be used for long term asset financing and short term debt for working capital. Total annual interest expense percentage to revenues should not exceed the net operating income margin as a percentage to revenues. This is what is termed negative leverage. Negative leverage should be avoided at all costs. The use of debt financing is a critical component to management of a company's cost of capital and cash flow, and proper use of debt lowers the over-all cost of capital.		
NET TRADE CYCLE	#11	The measurement of average days to annual revenues tied up in accounts receivable, inventory and accounts payable is used to determine the net trade cycle or cash conversion cycle. It tells a company how fast cash goes through its sale or trade cycle before coming back out as cash again. The shorter the days in the NTC or CCC the better in most cases. The days in accounts receivable plus the days in inventory less the days in accounts payable will produce the NTC days. This is a critical metric in managing the business operations.		
ECONOMIC VALUE ADDED (EVA)	#12	Economic value added is a long term goal that every firm should follow without exception. This calculation determines the actual cost of your capital (COC) both debt and equity combined as compared to the return on assets or ROA. The ROA needs to exceed the COC in order to add premium value to the business over and above the book net equity. When the ROA falls under COC the firm is destroying capital employed in the business. This would be the same as selling your products or services below the cost to produce them. You can only do that for so long before bad things begin to happen to the business.		

Income Statement	2007	2008	2009	2010	2011
Gross Revenues	153,000	272,000	777,000	1,974,000	3,711,000
COGS	41,000	124,000	223,000	493,000	860,000
Gross Profit	112,000	148,000	554,000	1,481,000	2,851,000
Operating Expense (including items below)	236,000	203,000	292,000	449,000	1,095,000
Operating Expense (Less Items Below)	212,000	159,000	214,000	310,000	772,000
Officer Salary	0	0	0	0	0
Depreciation	24,000	44,000	78,000	139,000	323,000
Amortization	0	0	0	0	0
Total Expenses	236,000	203,000	292,000	449,000	1,095,000
Operating Income/Loss	(124,000)	(55,000)	262,000	1,032,000	1,756,000
Interest Income	0	0	0	0	0
Other Income	0	0	0	0	0
Total Other Income	0	0	0	0	0
Other Expense (-)	(11,000)	(1,000)	(8,000)	(24,000)	(61,000)
Interest Expense (-)	0	0	0	0	0
Total Other Expense	(11,000)	(1,000)	(8,000)	(24,000)	(61,000)
Pre-Tax Income	(135,000)	(56,000)	254,000	1,008,000	1,695,000
Income Tax Expense	3,000	0	25,000	402,000	695,000
Net Income After Tax	(138,000)	(56,000)	229,000	606,000	1,000,000
	Annual Tax Rate	-2%	0%	10%	40%
Balance Sheet					
ASSETS	2007	2008	2009	2010	2011
Current Assets					
Cash	305,000	297,000	633,000	1,785,000	3,908,000
Short Term Investments	0	0	0	0	0
Accounts Receivable - Net	31,000	52,000	148,000	373,000	547,000
Inventories and WIP	0	0	0	0	0
WIP	0	0	0	0	0
Advances & Other Current Assets	0	0	0	0	0
Prepaid Expenses	7,000	12,000	35,000	88,000	149,000
Total Current Assets	343,000	361,000	816,000	2,246,000	4,604,000
Fixed Assets					
Plant and Equipment	106,000	199,000	294,000	859,000	2,083,000
Buildings & Leasehold Improvements	0	0	0	0	0
Land	0	0	0	0	0
Accumulated Depreciation	(24,000)	(68,000)	(146,000)	(285,000)	(608,000)
Net Plant Equipment	82,000	131,000	148,000	574,000	1,475,000
Other Intangible Assets	23,000	13,000	145,000	170,000	252,000
TOTAL ASSETS	448,000	505,000	1,109,000	2,990,000	6,331,000
	\$0	\$0	\$0	\$0	\$0
LIABILITIES	2007	2008	2009	2010	2011
Current Liabilities					
Accounts Payable	4,000	8,000	15,000	29,000	63,000
Other Payables	25,000	30,000	0	212,000	467,000
Unearned Income/Deposits	5,000	7,000	20,000	42,000	90,000
Line of Credit	0	0	0	0	0
Other Current Liabilities	0	0	0	0	0
Current Portion of Long Term Debt	6,000	6,000	40,000	106,000	279,000
Total Current Liabilities	40,000	51,000	75,000	389,000	899,000
Long Term Liabilities					
Long Term Debt	140,000	125,000	365,000	545,000	812,000
Other Loans Payable	0	0	0	0	0
Other Loans Payable	0	0	0	0	0
Shareholder loans	0	0	0	0	0
Short/Current Long Term Debt	(6,000)	(6,000)	(40,000)	(106,000)	(279,000)
Net Long Term Liabilities	134,000	119,000	325,000	439,000	533,000
Total Liabilities	174,000	170,000	400,000	828,000	1,432,000
STOCKHOLDER EQUITY					
Common Stock	0	0	0	615,000	615,000
Preferred Stock	0	0	0	0	0
Additional Paid In Capital	0	0	0	0	0
Dividends	0	0	0	0	0
Retained Earnings	0	0	0	0	0
Treasury Stock	0	0	0	0	0
Net Income	(138,000)	(56,000)	229,000	606,000	1,000,000
Other Stockholder Equity	0	0	0	0	0
Total Stockholder Equity	(138,000)	(56,000)	229,000	1,221,000	1,615,000
Total Liabilities & Stockholder Equity	0	0	0	0	0



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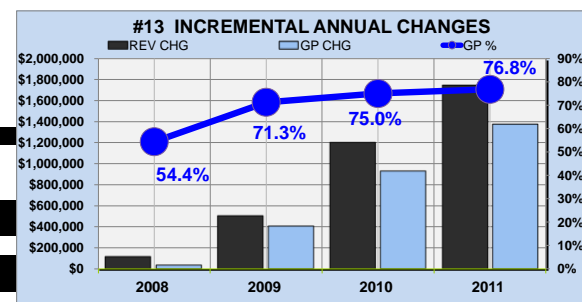
May 16, 2012

Privately Held Company - Calendar Year End - Accrual Basis

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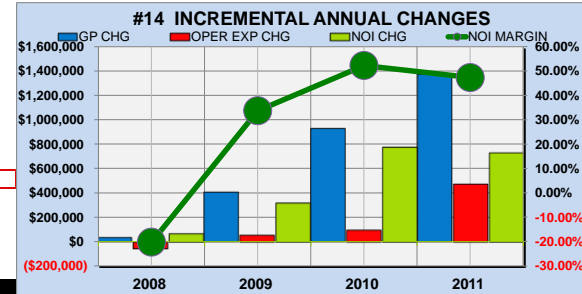
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INCOME STATEMENT												
REVENUES	2007	2008	2009	2010	2011	AVERAGE	% of CURRENT REVENUES	% of AVERAGE REVENUES	GROWTH RATE in DOLLARS	STANDARD DEVIATION	PROBABILITY	LINKAGE TO REVENUES
(all numbers in .000s)												
Annualizing Factor												
GROSS REVENUES:	\$153,000	\$272,000	\$777,000	\$1,974,000	\$3,711,000	\$1,377,400	100.00%	100.00%	121.92%	1,490,232	108.19%	100.00%
Other Revenues	0	0	0	0	0	0						
Other Revenues	0	0	0	0	0	0						
Returns, Refunds, and Discounts	0	0	0	0	0	0						
Write-downs	0	0	0	0	0	0						
TOTAL NET REVENUES	\$153,000	\$272,000	\$777,000	\$1,974,000	\$3,711,000	\$1,377,400	100.00%	100.00%	121.92%	1,490,232	108.19%	100.00%
Annual Percentage Increase or Decrease in Net Revenues		77.78%	185.66%	154.05%	87.99%							
ANNUAL PRICING CHANGES		-11.05%	26.83%	4.28%	1.94%	5.50%						
NET ANNUAL PRICE ADJUSTED REVENUE GROWTH		88.82%	158.84%	149.77%	86.05%	120.00%						
PRICE ELASTICITY (sensitivity to price changes)		8.04	5.92	34.98	44.35	30.22						
ANNUAL NET REVENUE CHANGE \$		119,000	505,000	1,197,000	1,737,000							
COSTS OF REVENUES (net of depreciation) same as COGS	41,000	124,000	223,000	493,000	860,000	348,200	23.17%	25.28%	114.01%	332,873	95.60%	99.78%
Costs of Revenues Margin	26.80%	45.59%	28.70%	24.97%	23.17%	29.85%						
Annual Percentage Increase or Decrease Costs of Revenues		202.44%	79.84%	121.08%	74.44%	119.45%						
ANNUAL COSTS OF REVENUE CHANGE \$		83,000	99,000	270,000	367,000							
GROSS PROFIT	\$112,000	\$148,000	\$554,000	\$1,481,000	\$2,851,000	\$1,029,200	76.83%	74.72%	124.62%	1,158,303	112.54%	99.98%
Gross Profit Margin	73.20%	54.41%	71.30%	75.03%	76.83%	70.15%						
Annual Percentage Increase or Decrease in Gross Profit Dollars		32.14%	274.32%	167.33%	92.51%	141.58%						
Annual Percentage Increase or Decrease in Gross Profit Margin		-25.67%	31.04%	5.23%	2.40%							
ANNUAL NET REVENUE CHANGE + Or - \$'s		\$119,000	\$505,000	\$1,197,000	\$1,737,000							
ANNUAL GROSS PROFIT CHANGE + Or - \$'s		\$36,000	\$406,000	\$927,000	\$1,370,000							
GROSS PROFIT \$ CHANGE to REVENUE \$ CHANGE in PERCENTAGE		30.25%	80.40%	77.44%	78.87%							
INCREMENTAL GP % minus OVERALL ANNUAL GP %		-24.16%	9.10%	2.42%	2.05%							
REVENUE PRICING POLICY												
GROSS PROFIT MARK-UP INDEX	3.73	2.19	3.48	4.00	4.32	3.55						
PERCENTAGE DIFFERENCE of INDEX (from One Year to the Next)		-41.22%	58.84%	14.92%	7.77%	10.08%						
CUMULATIVE ANNUAL PERCENTAGE DIFFERENCES												
ANNUAL PERCENTAGE times ANNUAL REVENUES		(\$112,115)	\$457,213	\$294,461	\$288,293	\$231,963						
CUMULATIVE ANNUAL PERCENTAGE times ANNUAL REVENUES		(\$112,115)	\$136,944	\$642,372	\$1,495,913							
REVENUES REQUIRED to MAINTAIN GP'S w/ HIGHEST GP MARGIN	\$145,785	\$192,644	\$721,113	\$1,927,741	\$3,711,000	\$1,339,657						
REVENUE DECLINE POSSIBLE still MAINTAINING GP DOLLARS	(\$7,215)	(\$79,356)	(\$55,887)	(\$46,259)	\$0	(\$37,743)						
OPERATING EXPENSES												
(all numbers in .000s)	2007	2008	2009	2010	2011	AVERAGE	% of CURRENT REVENUES	% of AVERAGE REVENUES	GROWTH RATE in DOLLARS	STANDARD DEVIATION	PROBABILITY	LINKAGE TO REVENUES
CORE OPERATING EXPENSE (excluding deprec. & amort. exp.)	\$212,000	\$159,000	\$214,000	\$310,000	\$772,000	\$333,400	20.80%	24.21%	38.14%	251,161	75.33%	95.02%
OTHER EXPENSES	0	0	0	0	0	0	0.00%					
DEPRECIATION EXPENSE (from COGS & operating exp.)	24,000	44,000	78,000	139,000	323,000	121,600	8.70%	8.83%	91.53%	120,741	99.29%	98.90%
AMORTIZATION EXPENSE (from operating exp.)	0	0	0	0	0	0						
TOTAL EXPENSES:	236,000	203,000	292,000	449,000	1,095,000	455,000	29.51%	33.03%	46.77%	370,024	81.32%	96.77%
Total Expenses to Revenues	154.25%	74.63%	37.58%	22.75%	29.51%	63.74%						
Annual Percentage Increase or Decrease in Operating Expense		-13.98%	43.84%	53.77%	143.88%	56.88%						
Total Core Operating Expenses to Revenues	138.56%	58.46%	27.54%	15.70%	20.80%	52.21%						
DIFFERENCE between GP & EXPENSE NET ANNUAL % CHANGE		46.13%	230.48%	113.56%	-51.37%							
ANNUAL CORE OPERATING EXPENSE CHANGE + Or - \$'s		(\$3,000)	55,000	96,000	462,000							



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53	NET OPERATING INCOME or (LOSSES)												
54	(all numbers in ,000s)												
55		2007	2008	2009	2010	2011	AVERAGE	% of CURRENT REVENUES	% of AVERAGE REVENUES	GROWTH RATE in DOLLARS	STANDARD DEVIATION	PROBABILITY	LINKAGE TO REVENUES
56	NET OPERATING INCOME or (LOSS) or NOI	(\$124,000)	(\$55,000)	\$262,000	\$1,032,000	\$1,756,000	\$574,200	47.32%	41.69%		804,220	140.06%	99.48%
57	Net Operating Income to Revenues	-81.05%	-20.22%	33.72%	52.28%	47.32%	6.41%						
58	Annual Percentage Increase or Decrease in NOI		-55.65%	-57.36%	293.89%	70.16%	-66.99%	RESTORING AVG. NOI %	-11.90%	REVS. to RESTORE \$ MARGIN	(\$2,497,528)		
59	ANNUAL NOI CHANGE in \$'s		\$69,000	\$317,000	\$770,000	\$724,000							
60	NOI CHANGE to REVENUE CHANGE in PERCENTAGE		57.98%	62.77%	64.33%	41.68%							
61	OTHER INCOME												
62	INTEREST INCOME	0	0	0	0	0							
63	GAIN on SALE of ASSETS	0	0	0	0	0							
64	OTHER	0	0	0	0	0							
65	OTHER	0	0	0	0	0							
66	TOTAL OTHER INCOME	0	0	0	0	0							
67													
68	OTHER EXPENSE												
69	INTEREST EXPENSE	0	0	0	0	0	0.00%						
70	ANNUAL INTEREST RATE ON ALL INTEREST BEARING DEBT	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%						
71	LOSS on SALE of ASSETS	0	0	0	0	0	0						
72	OTHER	(11,000)	(1,000)	(8,000)	(24,000)	(61,000)	(21,000)						
73	OTHER	0	0	0	0	0	0						
74	TOTAL OTHER EXPENSE	(11,000)	(1,000)	(8,000)	(24,000)	(61,000)	(21,000)						
75	pre-tax net income to revenues	-88.24%	-20.59%	32.69%	51.06%	45.68%	4.12%						
76	PRE-TAX INCOME	(\$135,000)	(\$56,000)	\$254,000	\$1,008,000	\$1,695,000	\$553,200						
77	LESS INCOME TAXES or REFUNDS	3,000	0	25,000	402,000	695,000	225,000	18.73%	16.34%		313,105	139.16%	98.75%
78	NET INCOME AFTER TAX	(138,000)	(56,000)	229,000	606,000	1,000,000	328,200	26.95%	23.83%		475,205	144.79%	98.44%
79	PLUS DEPRECIATION AND AMORTIZATION	24,000	44,000	78,000	139,000	323,000	121,600						
80	GROSS AFTER TAX CASH FLOW	(114,000)	(12,000)	307,000	745,000	1,323,000	449,800	35.65%	32.66%		591,849	131.58%	99.22%
81	GROSS AFTER TAX CASH FLOW MARGIN	-74.51%	-4.41%	39.51%	37.74%	35.65%	6.80%						
82													
83	EBIT \$	(124,000)	(55,000)	262,000	1,032,000	1,756,000	574,200	47.32%	41.69%		804,220	140.06%	99.48%
84	EBIT MARGIN	-81.05%	-20.22%	33.72%	52.28%	47.32%	6.41%						
85	EBITDA \$	(100,000)	(11,000)	340,000	1,171,000	2,079,000	695,800	56.02%	50.52%		921,753	132.47%	99.75%
86	EBITDA MARGIN	-65.36%	-4.04%	43.76%	59.32%	56.02%	17.94%						
87	CASH FLOW BEFORE FINANCING - DEBT FREE		(112,000)	(62,000)	103,000	71,000	0	1.91%	0.00%		103,341		
88	CASH FLOW BEFORE FINANCING MARGIN		-41.18%	-7.98%	5.22%	1.91%	-10.51%						
89	ADJ. CASH FLOW BEFORE FINANCING - DEBT FREE		(122,000)	70,000	128,000	153,000	57,250	4.12%	4.16%		124,454	217.39%	79.93%
90	ADJ. CASH FLOW BEFORE FINANCING MARGIN		-44.85%	9.01%	6.48%	4.12%	-6.31%						
91	ACTUAL CASH FLOW BEFORE FINANCING		(112,000)	(62,000)	103,000	71,000	0	1.91%	0.00%		103,341		
92	ADJ. CASH FLOW BEFORE FINANCING MARGIN		-41.18%	-7.98%	5.22%	1.91%	-10.51%						



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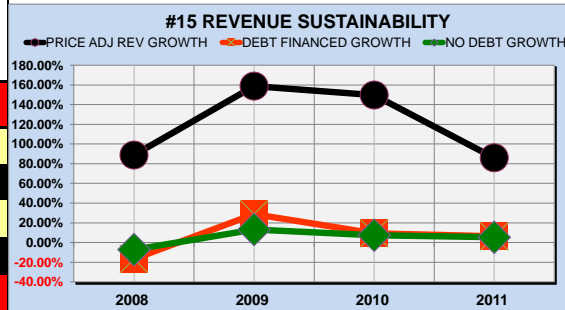
	1	2	3	4	5	6	7	8	9	10	11	12
93	BALANCE SHEET											
94	ASSETS											
95	(all numbers in ,000s)											
96	after-tax net income to revenues	-90.20%	-20.59%	29.47%	30.70%	26.95%	-4.73%					
97	CURRENT ASSETS											
98	Cash Balance Excess or (Shortfall)	308,000	290,000	520,000	1,695,000	3,981,000	1,358,800	62.88%	59.69%	1,576,314	116.01%	98.88%
99	CASH	305,000	297,000	633,000	1,785,000	3,908,000	1,385,600	61.73%	60.86%	89,200	1,536,325	110.88%
100	ACCOUNTS RECEIVABLE (net of Bad Debt Allowance)	31,000	52,000	148,000	373,000	547,000	230,200	8.64%	10.11%	104,950	223,017	96.88%
101	INVENTORIES plus WORK in PROCESS	0	0	0	0	0	0	0.00%				98.90%
102	ADVANCES & OTHER CURRENT ASSETS	0	0	0	0	0	0	0.00%				
103	PREPAID EXPENSES	7,000	12,000	35,000	88,000	149,000	58,200	2.35%	2.56%	114,790	60,056	103.19%
104	ACCOUNTS RECEIVABLE to REVENUES %	20.26%	19.12%	19.05%	18.90%	14.74%	18.41%					
105	INVENTORY to REVENUES %	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%					
106	OTHER CURRENT ASSETS to REVENUES %	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%					
107	PREPAID EXPENSES to REVENUES %	4.58%	4.41%	4.50%	4.46%	4.02%	4.39%					
108	TOTAL CURRENT ASSETS to REVENUES %	24.84%	23.53%	23.55%	23.35%	18.76%	22.81%					
109	TOTAL CURRENT ASSETS	\$343,000	\$361,000	\$816,000	\$2,246,000	\$4,604,000	\$1,674,000	72.72%	73.53%	91,410	1,812,717	108.29%
110												
111	FIXED ASSETS											
112	LAND	0	0	0	0	0	0	0.00%				
113	BUILDINGS/LEASE IMPROVEMENTS	0	0	0	0	0	0	0.00%				
114	PLANT & EQUIPMENT	106,000	199,000	294,000	859,000	2,083,000	708,200	32.90%	31.11%	110,550	822,543	116.15%
115	OFFICE EQUIPMENT	0	0	0	0	0	0					
116	TRANSPORTATION EQUIPMENT	0	0	0	0	0	0					
117	(LESS: ACCUMULATED DEPRECIATION EXPENSE)	(24,000)	(68,000)	(146,000)	(285,000)	(608,000)	(226,200)	-9.60%	-9.94%	235,358	-104,050	-99.55%
118		0										
119	TOTAL NET FIXED ASSETS	\$82,000	\$131,000	\$148,000	\$574,000	\$1,475,000	\$482,000	23.30%	21.17%	105,940	589,336	122.27%
120												
121	OTHER ASSETS											
122	GOODWILL	23,000	13,000	145,000	170,000	252,000	120,600	3.98%	5.30%	81,940	101,741	84.36%
123	OTHER INTANGIBLE ASSETS	0	0	0	0	0	0	0.00%				92.32%
124	TOTAL OTHER ASSETS	23,000	13,000	145,000	170,000	252,000	120,600	3.98%	5.30%	81,940	101,741	84.36%
125		0.67%	-1.39%	-10.19%	-3.01%	1.15%						
126	TOTAL ASSETS	\$448,000	\$505,000	\$1,109,000	\$2,990,000	\$6,331,000	\$2,276,600	100.00%	100.00%	93,890	2,489,615	109.36%
127	CASH ADJUSTMENT FACTOR	\$305,000	\$290,000	\$520,000	\$1,695,000	\$3,908,000	\$1,343,600					

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	1	2	3	4	5	6	7	8	9	10	11	12	
128	LIABILITIES:												
129	CURRENT LIABILITIES												
130	ACCOUNTS PAYABLE	\$4,000	\$8,000	\$15,000	\$29,000	\$63,000	\$23,800	1.00%	1.05%	99.21%	23,889	100.38%	99.42%
131	OTHER PAYABLES	25,000	30,000	0	212,000	467,000	146,800	7.38%	6.45%	107.90%	197,994	134.87%	97.65%
132	UNEARNED INCOME	5,000	7,000	20,000	42,000	90,000	32,800	1.42%	1.44%	105.98%	35,209	107.35%	99.68%
133	LINE OF CREDIT or Credit Cards	0	0	0	0	0	0	0.00%					
134	CURRENT PORTION OF LONG TERM DEBT & LEASES	6,000	6,000	40,000	106,000	279,000	87,400	4.41%	3.84%	161.13%	114,625	131.15%	98.98%
135	LINE OF CREDIT LIMIT based on 75% AR and 40% INVENTORY	\$23,250	\$39,000	\$111,000	\$279,750	\$410,250	\$172,650						
136	TOTAL CURRENT LIABILITIES:	\$40,000	\$51,000	\$75,000	\$389,000	\$899,000	\$290,800	14.20%	12.77%	117.73%	369,637	127.11%	98.92%
137	ACCOUNTS PAYABLE PLUS OTHER PAYABLES to REVENUES %	18.95%	13.97%	1.93%	12.21%	14.28%	12.27%						
138	UNEARNED INCOME to REVENUES %	3.27%	2.57%	2.57%	2.13%	2.43%	2.59%	58.52%	60.76%	WORKING CAPITAL GAP with CASH BALANCE			
139	LOC BALANCE USED to REVENUES %	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	-3.21%	-0.11%	WORKING CAPITAL GAP without CASH BALANCE			
140	TOTAL CURRENT LIABILITIES to REVENUES %	22.22%	16.54%	4.50%	14.34%	16.71%	14.86%						
141	WORKING CAPITAL FUNDING SHORTFALL or EXCESS to REVENUES%	-2.61%	-6.99%	-19.05%	-9.02%	-2.05%	-7.94%						
142	LONG TERM LIABILITIES												
143	LONG TERM DEBT	\$140,000	\$125,000	\$365,000	\$545,000	\$812,000	\$397,400	12.83%	17.46%	55.19%	289,476	72.84%	98.02%
144	OTHER LOANS PAYABLE	0	0	0	0	0	0						
145	CAPITAL LEASE	0	0	0	0	0	0						
146	SHAREHOLDERS' LOANS	0	0	0	0	0	0						
147	ACCRUED FEDERAL INCOME TAXES	0	0	0	0	0	0						
148	LESS CURRENT PORTION OF LONG TERM DEBT	(6,000)	(6,000)	(40,000)	(106,000)	(279,000)	(87,400)						
149													
150	TOTAL LONG TERM DEBT	\$134,000	\$119,000	\$325,000	\$439,000	\$533,000	\$310,000	8.42%	13.62%	41.22%	183,066	59.05%	93.01%
151													
152	TOTAL LIABILITIES:	\$174,000	\$170,000	\$400,000	\$828,000	\$1,432,000	\$600,800	22.62%	26.39%	69.37%	536,326	89.27%	99.92%
153													
154	STOCKHOLDERS' EQUITY												
155	COMMON STOCK - CUMULATIVE	\$415,000	\$415,000	\$515,000	\$615,000	\$615,000	\$515,000						
156	OTHER PAID-IN CAPITAL or DISTRIBUTIONS -Cumulative	0	117,000	187,000	1,336,000	3,768,000	1,081,600						
157	RETAINED EARNINGS-BEGINNING	0	(141,000)	(197,000)	7,000	211,000	(24,000)	3.33%	-1.05%		158,414	-660.06%	81.62%
158	NET INCOME	(138,000)	(56,000)	229,000	606,000	1,000,000	328,200	15.80%	14.42%		475,205	144.79%	98.44%
159	Tax Paid	(3,000)	0	(25,000)	(402,000)	(695,000)	(225,000)						
160	Dividend Distributions	0	0	0	0	0	0						
161	Other Distributions	0	0	0	0	0	0						
162	RETAINED EARNINGS-ENDING	(141,000)	(197,000)	7,000	211,000	516,000	79,200	8.15%	3.48%		290,755	367.11%	99.02%
163	LESS TREASURY STOCK	0	0	0	0	0	0						
164	EQUITY	\$274,000	\$335,000	\$709,000	\$2,162,000	\$4,899,000	\$1,675,800	77.38%	73.61%	105.63%	1,957,224	116.79%	99.35%
165	Annual Equity to Total Assets	61.2%	66.3%	63.9%	72.3%	77.4%	68.2%						
166	Annual Equity Percentage Changes		22.26%	111.64%	204.94%	126.60%	116.36%						
167													
168	Share Price					\$48.99							
169	Shares Outstanding					100,000							
170	Market Capitalization of Equity					\$4,899,000							
171	MV Equity to Book Equity					100.00%							
172	After-Tax Current Yield on MV Equity (plus dividends)					20.41%							
173	After-Tax Dividend Yield Based on MV Equity					0.00%							
174	TOTAL LIABILITIES & NET WORTH	\$448,000	\$505,000	\$1,109,000	\$2,990,000	\$6,331,000	\$2,276,600	100.00%	100.00%	93.89%	2,489,615	109.36%	99.63%
175	Check	0	0	0	0	0							

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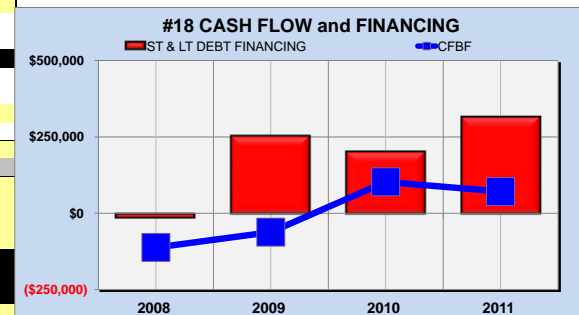
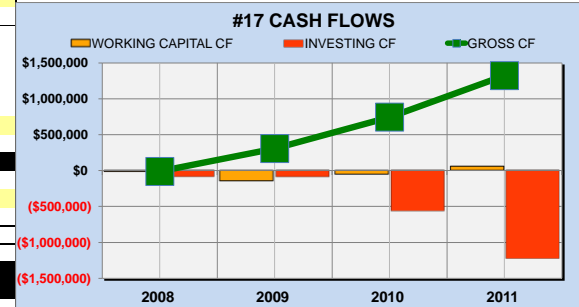
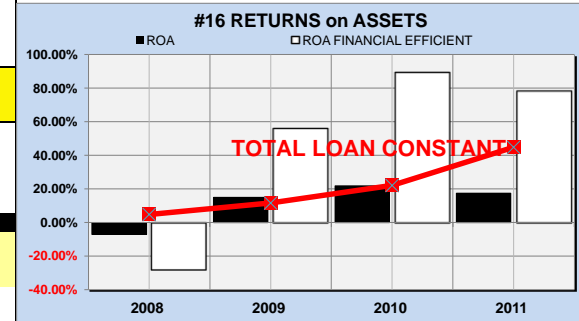
	1	2	3	4	5	6	7	8	9	10	11	12	
176	SUSTAINABLE REVENUE GROWTH:												
177	2007	2008	2009	2010	2011	AVERAGE							
178													
179	PROFIT MARGIN TO REVENUES	-90.20%	-20.59%	29.47%	30.70%	26.95%	-4.73%						
180	TOTAL ASSETS TO REVENUES	292.81%	185.66%	142.73%	151.47%	170.60%	188.65%						
181	RETENTION RATIO - CURRENT RETAINED to NET INC.	102.17%	100.00%	89.08%	33.66%	30.50%	71.08%						
182	RETENTION RATIO - CURRENT RETAINED to NET INC. - ADJ.	102.17%	-108.93%	170.74%	254.13%	407.30%	165.08%						
183	RETURN ON EQUITY (ROE)		-16.72%	32.30%	28.03%	20.41%	16.01%						
184	RETURN ON ASSETS (ROA)		-7.21%	14.89%	21.91%	17.40%	11.75%						
185	DEBT RATIO	48.91%	35.52%	45.84%	20.31%	10.88%	32.29%						
186	Green = continue Amber = warning Red = danger												
187	CURRENT YEAR REVENUE GROWTH RATE - NOMINAL	77.78%	185.66%	154.05%	87.99%	126.37%							
188	PRICE ADJUSTED ANNUAL REVENUE GROWTH RATE	88.82%	158.84%	149.77%	86.05%	120.87%							
189	SUSTAINABLE GROWTH (Equity Based)	-16.72%	28.77%	9.44%	6.23%	6.93%							
190	SUSTAINABLE GROWTH (Equity Based) - adjusted	18.21%	55.15%	71.23%	83.14%	56.93%							
191	CURRENT YEAR REVENUE GROWTH RATE - NOMINAL	77.78%	185.66%	154.05%	87.99%	126.37%							
192	PRICE ADJUSTED ANNUAL REVENUE GROWTH RATE	88.82%	158.84%	149.77%	86.05%	120.87%							
193	INTERNAL GROWTH (Asset Based)	-7.21%	13.26%	7.38%	5.31%	4.68%							
194	INTERNAL GROWTH (Asset Based) - adjusted	7.85%	25.42%	55.69%	70.88%	39.96%							
195	Green = continue Amber = warning Red = danger												
196													
197	RATIO ANALYSIS:												
198	2007	2008	2009	2010	2011	AVERAGE							
199	FLOW RATIO												
200	TOTAL CURRENT ASSETS	\$343,000	\$361,000	\$816,000	\$2,246,000	\$4,604,000	\$1,674,000						
201	Less CASH & CASH EQUIVALENTS	305,000	297,000	633,000	1,785,000	3,908,000	1,385,600						
202	ADJUSTED CURRENT ASSETS (Total less cash & equiv)	38,000	64,000	183,000	461,000	696,000	288,400						
203	TOTAL CURRENT LIABILITIES	40,000	51,000	75,000	389,000	899,000	290,800						
204	FLOW RATIO (Less than 1 desirable)	0.95	1.25	2.44	1.19	0.77	1.32						
205	DEBT RATIO		50.75%	56.42%	38.30%	29.23%	43.67%						
206	TIMES INTEREST EARNED		0.00	0.00	0.00	0.00	0.00						
207	OPERATING LEVERAGE		137.16%	52.71%	30.32%	38.41%	64.65%						
208	ACCOUNTS PAYABLE TO REVENUES		2.94%	1.93%	1.47%	1.70%	2.01%						
209	LONG TERM DEBT TO TOTAL LIABILITIES		70.00%	81.25%	53.02%	37.22%	60.37%						
210	LONG TERM DEBT TO TOTAL ASSETS		23.56%	29.31%	14.68%	8.42%	18.99%						
211	TOTAL LIABILITIES TO TOTAL ASSETS		33.66%	36.07%	27.69%	22.62%	30.01%						
212	TOTAL DEBT +/- \$ TO REVENUES +/- \$		(\$0.03)	\$0.46	\$0.36	\$0.35	\$0.28						
213													
214	CURRENT RATIO		7.08	10.88	5.77	5.12	7.21						
215	QUICK RATIO		7.08	10.88	5.77	5.12	7.21						
216	CASH RATIO		82.27%	77.57%	79.47%	84.88%	81.05%						
217	CASH TO CURRENT LIAB.		582.35%	844.00%	458.87%	434.71%	579.98%						
218	WORKING CAPITAL		\$310,000	\$741,000	\$1,857,000	\$3,705,000	\$1,653,250						
219	ADJUSTED WORKING CAPITAL (AWC)		\$44,000	\$133,000	\$344,000	\$484,000	\$251,250						
220	CHANGE IN WORKING CAPITAL		\$310,000	\$431,000	\$1,116,000	\$1,848,000	\$926,250						
221	NET WORKING CAPITAL		\$191,000	\$416,000	\$1,418,000	\$3,172,000	\$1,299,250						
222	WORKING CAPITAL TO TOTAL ASSETS		61.39%	66.82%	62.11%	58.52%	62.21%						
223													
224	REVENUES TO TOTAL ASSETS		0.54	0.70	0.66	0.59	0.62						
225	WORKING CAPITAL TO REVENUES		113.97%	95.37%	94.07%	99.84%	100.81%						
226	ADJUSTED WORKING CAPITAL TO REVENUES		16.18%	17.12%	17.43%	13.04%	15.94%						
227	FIXED ASSETS TO REVENUES		48.16%	19.05%	29.08%	39.75%	34.01%						
228	ACCOUNTS RECEIVABLE TO REVENUES		19.12%	19.05%	18.90%	14.74%	17.95%						
229	REVENUES TO INVENTORY												
230	NET INCOME +/- \$ TO REVENUES +/- \$		\$0.69	\$0.56	\$0.31	\$0.23	\$0.45						
231	GROSS PROFIT MARGIN		54.41%	71.30%	75.03%	76.83%	69.39%						
232	NET PROFIT MARGIN		-20.59%	29.47%	30.70%	26.95%	16.63%						



	2007	2008	2009	2010	2011
>Yrly Dep Exp	-24,000.00	-44,000.00	-78,000.00	-139,000.00	-323,000.00
>Gross Fixed Assets (GFA)	106,000.00	199,000.00	294,000.00	859,000.00	2,083,000.00
>Accumulated Depreciation	-24,000.00	-68,000.00	-146,000.00	-285,000.00	-608,000.00
>Beg Acct Deprc		-24,000.00	-68,000.00	-146,000.00	-285,000.00
>Prior Actual Accum Deprc		-24,000.00	-68,000.00	-146,000.00	-285,000.00
>Difference		0.00	0.00	0.00	0.00
>Prior Yr GFA		106,000.00	199,000.00	294,000.00	859,000.00
Minus Difference		0.00	0.00	0.00	0.00
>Current GFA		106,000.00	199,000.00	294,000.00	859,000.00
>Adj Prior GFA		106,000.00	199,000.00	294,000.00	859,000.00
CAPEX		93,000	95,000	565,000	1,224,000

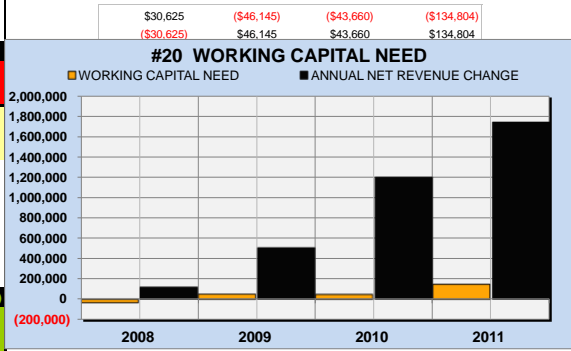
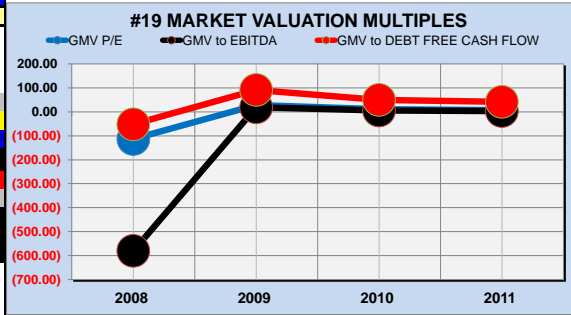
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	1	2	3	4	5	6	7	8	9	10	11	12
233	RETURN ON ASSETS (ROA)	-7.21%	14.89%	21.91%	17.40%	11.75%						
234	ROA excluding other assets	-7.40%	17.13%	23.23%	18.12%	12.77%						
235	ROA excluding other assets & excess cash or add deficit	-18.02%	37.18%	58.24%	50.75%	32.04%						
236	RETURN ON ASSETS (ROA) with EFFICIENT FINANCING ONLY	-17.08%	27.16%	50.28%	45.61%	26.49%						
237	RETURN ON ASSETS (ROA) with EFFICIENT FINANCING & FULLY ADJ.	-27.88%	56.05%	89.24%	78.23%	48.91%						
238	DEBT LOAN CONSTANT	4.76%	11.59%	22.04%	44.78%	20.79%						
239	DEBT LOAN CONSTANT asset weighted	19.09%	37.27%	136.99%	455.09%	162.11%						
240	DEBT LOAN CONSTANT asset weighted & tax adjusted	25.77%	50.31%	184.94%	614.38%	218.85%						
241	RETURN ON GROSS FIXED ASSETS	-28.14%	77.89%	70.55%	48.01%	42.08%						
242	RETURN ON EQUITY (ROE)	-16.72%	32.30%	28.03%	20.41%	16.01%						
243	GROSS AFTER TAX CASH FLOW	(\$12,000)	\$307,000	\$745,000	\$1,323,000	\$590,750						
244	GROSS AFTER TAX CASH FLOW TO SALES	-4.41%	39.51%	37.74%	35.65%	27.12%						
245	EMPLOYEES (FTEs) INCLUDING ANY OWNER OPERATORS											
246	REVENUES PER FULL TIME EMPLOYEE											
247												
248	DUAL CASH FLOW ANALYSIS:	2007	2008	2009	2010	2011	AVERAGE					
249												
250	NET INCOME		(\$56,000)	\$254,000	\$1,008,000	\$1,695,000	\$725,250					
251	PLUS: DEPRECIATION		44,000	78,000	139,000	323,000	146,000					
252	PLUS OTHER		0	0	0	0	0					
253	MINUS: INCOME TAX ACTUAL or @ 35% APPLIED		0	25,000	402,000	695,000	280,500					
254	GROSS CASH FLOW (GCF)		(\$12,000)	\$307,000	\$745,000	\$1,323,000	\$590,750					
255	Percentage to Revenues		-4.41%	39.51%	37.74%	35.65%	42.89%					
256	ACCOUNTS RECEIVABLE - DECR/(INCR)		(21,000)	(96,000)	(225,000)	(174,000)	(129,000)					
257	INVENTORY - DECR/(INCR)		0	0	0	0	0					
258	OTHER CURRENT ASSETS - DECR/(INCR)		(5,000)	(23,000)	(53,000)	(61,000)	(35,500)					
259	ACCOUNTS PAYABLE - INCR/(DECR)		4,000	7,000	14,000	34,000	14,750					
260	OTHER CURRENT LIABILITIES - INCR/(DECR)		5,000	(30,000)	212,000	255,000	110,500					
261	OPERATING CASH FLOW (OCF)		(\$17,000)	(\$142,000)	(\$52,000)	\$54,000	(\$39,250)					
262	Percentage to Revenues		-6.25%	-18.28%	-2.63%	1.46%	-2.85%					
263	FIXED ASSETS - DECR/(INCR)		(\$93,000)	(\$95,000)	(\$565,000)	(\$1,224,000)	(\$494,250)					
264	OTHER INVESTMENTS - DECR/(INCR)		10,000	(132,000)	(25,000)	(82,000)	(57,250)					
265	INVESTING CASH FLOW (ICF)		(\$83,000)	(\$227,000)	(\$590,000)	(\$1,306,000)	(\$551,500)					
266	Percentage to Revenues		-30.51%	-29.21%	-29.89%	-35.19%	-40.04%					
267	CASH FLOW BEFORE FINANCING (CFBF)		(\$112,000)	(\$62,000)	\$103,000	\$71,000	\$0					
268	Percentage to Revenues		-41.18%	-7.98%	5.22%	1.91%	0.00%					
269	CASH FLOW BEFORE FINANCING - adjusted		(122,000)	70,000	128,000	153,000	57,250					
270	Conversion Ratio of Gross Cash Flow to CFBF adj]		1016.67%	22.80%	17.18%	11.56%	9.69%					
271	Percentage to Revenues		-41.18%	-7.98%	5.22%	1.91%	0.00%					
272	SHORT TERM DEBT - INCR/(DECR)		2,000	47,000	88,000	221,000	89,500					
273	LONG TERM DEBT - INCR/(DECR)		(15,000)	206,000	114,000	94,000	99,750					
274	DEBT FINANCING CASH FLOW (DFCF)		(\$13,000)	\$253,000	\$202,000	\$315,000	\$189,250					
275	Percentage to Revenues		-4.78%	32.56%	10.23%	8.49%	13.74%					
276	CAPITAL STOCK - INCR/(DECR)		0	100,000	100,000	0	0					
277	PAID-IN or DISTRIBUTION ADJMT. - INCR/(DECR)		117,000	70,000	1,149,000	2,432,000	942,000					
278	DISTRIBUTIONS - DIVIDENDS, TAX, & OTHER		0	(25,000)	(402,000)	(695,000)	(280,500)					
279	TREASURY STOCK - INCR/(DECR)		0	0	0	0	0					
280	EQUITY FINANCING CASH FLOW (EFCF)		\$117,000	\$145,000	\$847,000	\$1,737,000	\$711,500					
281	Percentage to Revenues		43.01%	18.66%	42.91%	46.81%	51.66%					
282	FINANCING CASH FLOW (FCF)		\$104,000	\$398,000	\$1,049,000	\$2,052,000	\$900,750					
283												
284	GROSS CASH FLOW (GCF)		(12,000)	307,000	745,000	1,323,000	590,750					
285	OPERATING CASH FLOW (OCF)		(17,000)	(142,000)	(52,000)	54,000	(39,250)					
286	INVESTING CASH FLOW (ICF)		(83,000)	(227,000)	(590,000)	(1,306,000)	(551,500)					
287	FINANCING CASH FLOW		104,000	398,000	1,049,000	2,052,000	900,750					
288	COMPREHENSIVE CASH FLOW (CCF)		(\$8,000)	\$336,000	\$1,152,000	\$2,123,000	\$800,750					
289			66.67%	109.45%	154.63%	160.47%	65.39%					
290	CASH BALANCE CHANGE		(\$8,000)	\$336,000	\$1,152,000	\$2,123,000	\$900,750					
291	Difference		0	0	0	0	0					



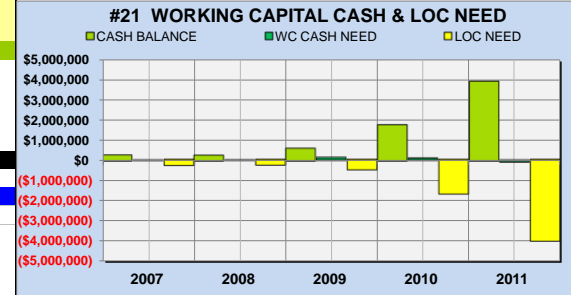
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	1	2	3	4	5	6	7	8	9	10	11	12	
292	HISTORICAL CAPITALIZED CASH FLOW VALUE:												
293	2007	2008	2009	2010	2011	WEIGHTED AVERAGE VALUE							
294	GROSS CASH FLOW												
295		(\$12,000)	\$307,000	\$745,000	\$1,323,000	\$812,900							
296	OPERATING CASH FLOW												
297		(17,000)	(142,000)	(52,000)	54,000	(24,100)							
298	ADD BACK AFTER TAX INTEREST EXPENSE												
299		0	0	0	0	0							
300	INVESTING CASH FLOW (less investment changes)												
301		(93,000)	(95,000)	(565,000)	(1,224,000)	(687,400)							
302	ADJUSTMENTS TO CASH FLOW (after tax)												
303		\$0	\$0	\$0	\$0	\$0							
304	DEBT FREE CASH FLOW BEFORE FINANCING												
305		(\$122,000)	\$70,000	\$128,000	\$153,000	\$101,400							
306	TOTAL ASSETS to NET INCOME (after tax) - CURRENT YEAR												
307		(9.02)	4.84	4.93	6.33	6.94							
308	TOTAL ASSETS to EBITDA - CURRENT YEAR												
309		(45.91)	3.26	2.55	3.05	3.27							
310	TOTAL ASSETS to DEBT FREE CASH FLOW - CURRENT YEAR												
311		(4.14)	15.84	23.36	41.38	22.45							
312	EFFECTIVE TAX RATE												
313		35.00%				2.40%							
314	DISCOUNT RATE or WEIGHTED COST of CAPITAL												
315		8.40%				2.40%							
316	GROWTH RATE LONG TERM - NOMINAL GDP RATE												
317		6.00%				4.94							
318	CAPITALIZATION RATE (CAP RATE) - inverse equals price multiple												
319		2.40%				8.51							
320	REMARKS:												
321	CAPITALIZED GROSS VALUE												
322					\$6,375,000	\$4,225,000							
323	MINUS TOTAL LIABILITIES												
324					\$1,432,000	\$1,432,000							
325	MARKET VALUE NET WORTH												
326					\$4,943,000	\$2,793,000							
327	MARKET VALUE TO BOOK NET WORTH												
328					100.90%	166.67%							
329	PLUS or MINUS WORKING CAPITAL CASH												
330					\$8,851,000	\$4,136,600							
331	TOTAL GROSS MARKET VALUE (GMV) to NET INCOME (after tax) - CURRENT YEAR												
332		(113.84)	27.84	10.52	6.38	19.42							
333	TOTAL GROSS MARKET VALUE (GMV) to EBITDA - CURRENT YEAR												
334		(579.55)	18.75	5.44	3.07	9.16							
335	TOTAL GROSS MARKET VALUE (GMV) to DEBT FREE CASH FLOW - CURRENT YEAR												
336		(52.25)	91.07	49.80	41.67	62.87							
337	GROSS EXTERNAL FINANCING NEED (EFN):												
338	2007	2008	2009	2010	2011	AVERAGE							
339	(using current assets and current liabilities)												
340	REVENUES	\$153,000	\$272,000	\$777,000	\$1,974,000	\$3,711,000	\$1,377,400						
341	CURRENT ASSETS TO REVENUES	224.18%	132.72%	105.02%	113.78%	124.06%	139.95%						
342	CURRENT LIABILITIES TO REVENUES	26.14%	18.75%	9.65%	19.71%	24.23%	19.70%						
343	CHANGE IN REVENUES		\$119,000	\$505,000	\$1,197,000	\$1,737,000	\$889,500						
344	PROFIT MARGIN	-90.20%	-20.59%	29.47%	30.70%	26.95%	-4.73%						
345	RETAINED EARNINGS/NET INCOME		100.00%	89.08%	33.66%	30.50%	63.31%						
346	EFN \$ AMOUNT: (EXCESS)		\$160,125	\$349,015	\$1,002,351	\$1,591,431	\$775,731						
347	Green = continue Amber = warning Red = danger												
348	ADJ. WORKING CAP EXTERNAL FINANCING NEED (EFN):												
349	2007	2008	2009	2010	2011	AVERAGE							
350	(using ARs plus inventory & APs & other payables)												
351	REVENUES	\$153,000	\$272,000	\$777,000	\$1,974,000	\$3,711,000	\$1,377,400						
352	ACCOUNTS RECEIVABLE PLUS INVENTORY to REVENUES	20.26%	19.12%	19.05%	18.90%	14.74%	18.41%						
353	ACCOUNTS PAYABLE to REVENUES	2.61%	2.94%	1.93%	1.47%	1.70%	2.13%						
354	OTHER PAYABLES (in Current Liabilities) to REVENUES	16.34%	11.03%	0.00%	10.74%	12.58%	10.14%						
355	CHANGE in REVENUES		\$119,000	\$505,000	\$1,197,000	\$1,737,000	\$889,500						
356	PROFIT MARGIN to REVENUES	-90.20%	-20.59%	29.47%	30.70%	26.95%	-4.73%						
357	RETAINED EARNINGS/NET INCOME		100.00%	89.08%	33.66%	30.50%	63.31%						
358	EFN \$ AMOUNT: (EXCESS)		\$30,625	(\$46,145)	(\$43,660)	(\$134,804)	(\$48,496)						
359	Green = continue Amber = warning Red = danger												



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	1	2	3	4	5	6	7	8	9	10	11	12
339	CURRENT LINE OF CREDIT NEED:											
340	2007	2008	2009	2010	2011	AVERAGE						
341												
342	CASH BALANCE	\$305,000	\$297,000	\$633,000	\$1,785,000	\$3,908,000	\$1,385,600					
343	CASH BURN RATE	440	383	529	811	874	607					
344	NEEDED LINE of CREDIT (LOC) (assuming no cash)	27,000	44,000	133,000	344,000	484,000	206,400					
345	NEEDED LOC (including other payables)	(3,000)	7,000	113,000	90,000	(73,000)	26,800					
346	CASH minus NEEDED ADJUSTED LOC	308,000	290,000	520,000	1,695,000	3,981,000	1,358,800					
347	OUTSTANDING LOC BALANCE	0	0	0	0	0	0					
348	EXCESS or (SHORTFALL) CASH BALANCE or LOC	\$308,000	\$290,000	\$520,000	\$1,695,000	\$3,981,000	\$1,358,800					
349		(308,000)	(290,000)	(520,000)	(1,695,000)	(3,981,000)						
350	NEEDED TOTAL CASH BALANCE in WORKING CAPITAL	(51,000)	\$7,000	\$113,000	\$90,000	(171,000)	\$26,800					
351		3,000	(7,000)	(113,000)	(90,000)	73,000	(26,800)					
352	MAXIMUM POTENTIAL BORROWING CAPACITY 65/40/33 net fixed	\$47,210	\$77,030	\$145,040	\$431,870	\$842,300	\$308,690					
353	TOTAL INTEREST BEARING LIABILITIES OUTSTANDING	139,000	126,000	345,000	491,000	623,000	342,800					
354	BORROWING AVAILABILITY or (OVER-BORROWED)	(91,790)	(48,970)	(199,960)	(49,130)	219,300	(34,110)					
355	INTEREST BEARING DEBT to EBITDA MULTIPLE	(1.39)	(11.45)	1.01	0.41	0.30	(2.22)					
356												
357	ALTMAN Z BANKRUPTCY SCORE:	2007	2008	2009	2010	2011	AVERAGE					
358												
359	WORKING CAPITAL / TOTAL ASSETS	67.63%	61.39%	66.82%	62.11%	58.52%	63.29%					
360	(x 6.56)	4.44	4.03	4.38	4.07	3.84	4.15					
361	ENDING RETAINED EARNINGS / TOTAL ASSETS	-31.47%	-39.01%	0.63%	7.06%	8.15%	-10.93%					
362	(x 3.26)	(1.03)	(1.27)	0.02	0.23	0.27	(0.36)					
363	EARNINGS PRE - INTEREST EXP & INC TAX / TOTAL ASSETS	-30.13%	-11.09%	22.90%	33.71%	26.77%	8.43%					
364	(x 6.72)	(2.03)	(0.75)	1.54	2.27	1.80	0.57					
365	NET WORTH / TOTAL LIABILITIES	157.47%	197.06%	177.25%	261.11%	342.11%	227.00%					
366	(x 1.05)	1.65	2.07	1.86	2.74	3.59	2.38					
367	ALTMAN Z SCORE:	3.04	4.08	7.80	9.31	9.50	6.75					
368	Green = continue Amber = warning Red = danger											



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	1	2	3	4	5	6	7	8	9	10	11	12	
369	NET TRADE CYCLE or CASH CONVERSION CYCLE:						AVERAGE						
370	ANNUAL YEAR END - NON-AVERAGED												
371	NUMBER OF DAYS TIED UP IN												
372	ACCOUNTS RECEIVABLE TO REVENUES	73	69	69	68	53	66						
373	CASH RELEASE or (USE) from ACCOUNTS RECEIVABLE		\$3,111	\$544	\$3,000	\$154,217	\$40,218						
374	NUMBER OF DAYS TIED UP IN												
375	INVENTORIES TO REVENUES	0	0	0	0	0	0						
376	CASH RELEASE or (USE) from INVENTORIES		\$0	\$0	\$0	\$0	\$0						
377	LESS: NUMBER OF DAYS TIED UP IN												
378	ACCOUNTS PAYABLE TO REVENUES	9	11	7	5	6	8						
379	CASH RELEASE or (USE) from ACCOUNTS PAYABLE		\$889	(\$7,853)	(\$9,108)	\$8,482	(\$1,898)						
380	NET TRADE CYCLE DAYS:						59						
381		64	58	62	63	47							
382	Green = continue Amber = warning Red = danger												
383	CAPITAL CASH NEEDS FOR FULL NET TRADE CYCLE		\$45,941	\$80,450	\$214,172	\$311,450	\$163,004						
384	DAILY OPERATIONAL EXPENSE CASH NEEDS		\$789	\$1,306	\$3,414	\$6,633	\$3,035						
385	NET CASH RELEASE or USE from TRADE CYCLE		\$4,000	(\$7,309)	(\$6,108)	\$162,699	\$38,321						
386	CASH GAIN or (LOSS) per Chg in NET TRADE DAYS		\$756	(\$2,158)	(\$5,483)	\$10,308							
387	WEIGHTED AVERAGE COST OF CAPITAL:						AVERAGE						
388	(using all interest bearing debt)												
389	OVERALL BORROW RATE AFTER TAX		0.00%	0.00%	0.00%	0.00%	0.00%						
390	RETURN ON EQUITY (ROE)		-16.72%	32.30%	28.03%	20.41%	16.01%						
391	FINANCED DEBT to FINANCED DEBT plus EQUITY - percentage		26.21%	31.43%	16.88%	9.81%	21.08%						
392	EQUITY to LONG TERM DEBT plus EQUITY - percentage		73.79%	68.57%	83.12%	90.19%	78.92%						
393	ACTUAL WEIGHTED COST OF CAPITAL:						20.85%						
394	ADJ. COST of CAP. with assumed ROE of 26.5% annually		19.55%	18.17%	22.03%	23.90%	20.91%						
395	MONTHLY DISCOUNT PERCENTAGE		1.63%	1.51%	1.84%	1.99%	1.74%						
396	ROE % / OPERATING EARNINGS GROWTH %		0.30		0.10	0.29	0.17						
397	DUPONT FORMULA - ROI, ROE, and ECONOMIC VALUE ADDED (EVA):						AVERAGE						
398	(return on invested capital & return on equity)												
399	REVENUES DIVIDED BY TOTAL ASSETS		53.86%	70.06%	66.02%	58.62%	62.14%						
400	NET OPERATING INCOME (NOI) AFTER TAX DIVIDED BY REVENUES		-13.14%	21.92%	33.98%	30.76%	18.38%						
401	TOTAL ASSETS DIVIDED BY TOTAL EQUITY		150.75%	156.42%	138.30%	129.23%	143.67%						
402	NET INCOME AFTER TAX DIVIDED BY REVENUES		-20.59%	29.47%	30.70%	26.95%	16.63%						
403	RETURN ON INVESTED CAPITAL ROI:		-7.08%	15.36%	22.43%	18.03%	12.19%						
404	ADJUSTED RETURN ON EQUITY ROE:		-10.67%	24.02%	31.03%	23.30%	16.92%						
405	RETURN ON EQUITY ROE:		-16.72%	32.30%	28.03%	20.41%	16.01%						
406	ROI minus ADJUSTED WEIGHTED COST OF CAPITAL		-26.63%	-6.79%	-0.86%	-0.38%	-8.67%						
407	CUMULATIVE EVA PREMIUM or (DEFICIT) WEALTH		(\$134,478)	(\$209,788)	(\$235,620)	(\$259,721)	(\$209,901)						
408	Green = continue Amber = warning Red = danger												

