

Statement Date	12/31/0001	12/31/0002	12/31/0003	12/31/0004	12/31/0005
Months Covered	12	12	12	12	12
Audit Mthd	Co.Prep'd	Co.Prep'd	Co.Prep'd	Co.Prep'd	Co.Prep'd
Accountant					
Analyst					
Stmnt Type	Annual	Annual	Annual	Annual	Annual
CURRENT ASSETS					
Cash	396	200	358	221	422
Accts/Notes Rec-Trade	2,200	2,562	2,790	3,094	3,154
Income Tax Receivable	31	-	-	-	148
Inventory	1,639	1,654	1,959	2,096	2,241
TOTAL CURRENT ASSETS	4,266	4,416	5,107	5,411	5,965
NON-CURRENT ASSETS					
Gross Fixed Assets	3,044	3,361	4,357	5,217	6,440
Accumulated Deprec (-)	1,456	1,766	2,114	2,550	2,947
Total Fixed Assets - Net	1,588	1,595	2,243	2,667	3,493
Due from Officers/Stockholders	9	8	39	28	22
Cash Value Life Insurance	10	117	191	230	504
Deferred Charges	13	21	32	31	10
Other Assets	24	29	27	33	47
TOTAL NON-CURRENT ASSETS	1,644	1,770	2,532	2,989	4,076
TOTAL ASSETS	5,910	6,186	7,639	8,400	10,041
CURRENT LIABILITIES					
ST Loans Payable-Bank	-	-	200	110	-
CPLTD-Bank	288	295	311	365	672
Accounts Payable-Trade	2,813	2,570	3,280	3,469	3,723
Due to Affiliates	-	-	-	-	127
Due to Officers/Stockholders	12	8	-	-	-
Accrued Profit Sharing	-	50	75	50	-
Accruals	180	201	246	275	474
Total Accrued Liabilities	180	251	321	325	474
Income Taxes Payable	-	87	65	82	-
TOTAL CURRENT LIABILITIES	3,293	3,211	4,177	4,351	4,996
NON-CURRENT LIABILITIES					
Long Term Debt-Bank	888	803	886	1,117	1,688
Deferred Income Taxes	58	111	186	190	156
TOTAL NON-CURRENT LIABILITIES	946	914	1,072	1,307	1,844
TOTAL LIABILITIES	4,239	4,125	5,249	5,658	6,840
NET WORTH					
Common Stock	4	4	4	4	4
Paid In Capital	167	167	167	167	367
Retained Earnings	1,500	1,890	2,219	2,571	2,830
TOTAL NET WORTH	1,671	2,061	2,390	2,742	3,201
TOTAL LIABILITIES & NET WORTH	5,910	6,186	7,639	8,400	10,041
Tangible Net Worth	1,671	2,061	2,390	2,742	3,201
Working Capital	973	1,205	930	1,060	969
Current Ratio	1.30	1.38	1.22	1.24	1.19
Quick Ratio	0.79	0.86	0.75	0.76	0.72
Receivables in Days	37.28	38.60	36.99	40.00	37.53
Inventory in Days	35.34	33.07	33.80	35.97	35.12
Payables in Days	60.66	51.39	56.58	59.53	58.35
Total Liabilities / TNW	2.54	2.00	2.20	2.06	2.14
Total Sr. Liab / TNW + Sub Debt	2.54	2.00	2.20	2.06	2.14
Funded Debt/EBITDA	2.67	1.11	1.44	1.33	2.52
Sustainable Growth	5.29	23.34	15.91	14.73	8.80

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Accountant										
Analyst										
Stmnt Type	Annual		Annual		Annual		Annual		Annual	
Sales/Revenues	21,540	100.0	24,228	100.0	27,527	100.0	28,236	100.0	30,672	100.0
Cost of Sales/Revenues	16,926	78.6	18,253	75.3	21,158	76.9	21,271	75.3	23,288	75.9
GROSS PROFIT	4,614	21.4	5,975	24.7	6,369	23.1	6,965	24.7	7,384	24.1
General & Admin Expense	4,173	19.4	4,987	20.6	5,398	19.6	5,769	20.4	6,449	21.0
Depreciation	285	1.3	345	1.4	411	1.5	509	1.8	592	1.9
TOTAL OPERATING EXPENSE	4,458	20.7	5,332	22.0	5,809	21.1	6,278	22.2	7,041	23.0
EBITDA	441	2.0	988	4.1	971	3.5	1,196	4.2	935	3.0
NET OPERATING PROFIT (EBIT)	156	0.7	643	2.7	560	2.0	687	2.4	343	1.1
Interest Expense (-)	97	0.5	108	0.4	123	0.4	184	0.7	168	0.5
Other Income	34	0.2	4	-	129	0.5	97	0.3	-	-
TOTAL OTHER INCOME(EXP)	(63)	(0.3)	(104)	(0.4)	6	-	(87)	(0.3)	(168)	(0.5)
PROFIT BEFORE TAXES	93	0.4	539	2.2	566	2.1	600	2.1	175	0.6
Current Income Tax	9	-	149	0.6	238	0.9	248	0.9	-	-
Income Tax Credit (+)	-	-	-	-	-	-	-	-	84	0.3
TOTAL INCOME TAX EXPENSE	9	-	149	0.6	238	0.9	248	0.9	(84)	(0.3)
NET PROFIT	84	0.4	390	1.6	328	1.2	352	1.2	259	0.8
Adj to Retained Earnings	-	-	-	-	1	-	-	-	-	-
Net Sales Growth, Composite %			12.48		13.62		2.58		8.63	
Gross Profit, % (incl. Deprac in CoGS)	21.42		24.66		23.14		24.67		24.07	
SG&A % (incl. Depr/Amrt)	20.70		22.01		21.10		22.23		22.96	
Cushion (GM-SG&A), % (excl. Depr/Amrt)	2.05		4.08		3.53		4.24		3.05	
Operating Profit Margin, %	0.72		2.65		2.03		2.43		1.12	
Net Profit After Tax, %	0.39		1.61		1.19		1.25		0.84	
RECONCILIATION OF NET WORTH										
Beginning Net Worth			1,671		2,061		2,390		2,742	
+ Net Profit After Tax	84		390		328		352		259	
(+/-) Change in Stock/Surplus			-		-		-		200	
(+/-) Change in Equity/Surplus Adj			-		1		-		-	
= Ending Book Value	1,671		2,061		2,390		2,742		3,201	
BREAK-EVEN ANALYSIS										
Break Even Sales	21,106		22,042		25,081		25,804		29,945	
DSC Break Even Sales			21,558		24,202		24,632		29,002	
Cash Flow DSC Break Even Sales			23,975		24,436		26,898		28,910	

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Accountant					
Analyst					
Stmnt Type	Annual	Annual	Annual	Annual	Annual
Sales/Revenues		24,228	27,527	28,236	30,672
Chg in Accts/Notes Rec-Trade		(362)	(228)	(304)	(60)
Cash Collected From Sales		23,866	27,299	27,932	30,612
Cost of Sales/Revenues		(18,253)	(21,158)	(21,271)	(23,288)
Chg in Inventory		(15)	(305)	(137)	(145)
Chg in Accounts Payable-Trade		(243)	710	189	254
Cash Paid To Suppliers		(18,511)	(20,753)	(21,219)	(23,179)
CASH FROM TRADING					
ACTIVITIES		5,355	6,546	6,713	7,433
General & Admin Expense		(4,987)	(5,398)	(5,769)	(6,449)
Chg in Deferred Charges		(8)	(11)	1	21
Chg in Accrued Profit Sharing		50	25	(25)	(50)
Chg in Accruals		21	45	29	199
Cash Paid for Operating Costs		(4,924)	(5,339)	(5,764)	(6,279)
CASH AFTER OPERATIONS		431	1,207	949	1,154
Other Income		4	129	97	-
Chg in Other Assets		(5)	2	(6)	(14)
Current Income Tax		(149)	(238)	(248)	-
Income Tax Credit (+)		-	-	-	84
Chg in Income Tax Receivable		31	-	-	(148)
Chg in Income Taxes Payable		87	(22)	17	(82)
Chg in Deferred Income Taxes		53	75	4	(34)
Other Income(Exp) & Taxes Paid		21	(54)	(136)	(194)
NET CASH AFTER OPERATIONS		452	1,153	813	960
Interest Expense (-)		(108)	(123)	(184)	(168)
Cash Paid for Dividends & Interest		(108)	(123)	(184)	(168)
NET CASH INCOME		344	1,030	629	792
CPLTD-Bank		(288)	(295)	(311)	(365)
Current Portion Long Term Debt		(288)	(295)	(311)	(365)
CASH AFTER DEBT AMORT.		56	735	318	427
Chg in Gross Fixed Assets		(317)	(996)	(860)	(1,223)
Chg in Accumulated Deprec (-)		310	348	436	397
Depreciation		(345)	(411)	(509)	(592)
Chg in Net Fixed Assets		(352)	(1,059)	(933)	(1,418)
Chg in Due from Officers/Stockholders		1	(31)	11	6
Chg in Cash Value Life Insurance		(107)	(74)	(39)	(274)
Chg in Investments		(106)	(105)	(28)	(268)
Cash Paid for Plant and Investments		(458)	(1,164)	(961)	(1,686)
FINANCING SURPLUS (REQMNTS)		(402)	(429)	(643)	(1,259)
Chg in ST Loans Payable-Bank		-	200	(90)	(110)
Chg in Due to Affiliates		-	-	-	127
Chg in Due to Officers/Stockholders		(4)	(8)	-	-
Chg in Long Term Debt		210	394	596	1,243
Adj to Retained Earnings		-	1	-	-
Chg in Paid In Capital		-	-	-	200
Total External Financing		206	587	506	1,460
CASH AFTER FINANCING		(196)	158	(137)	201
Add:					
Cash		396	200	358	221
ENDING CASH & EQUIVALENTS		200	358	221	422

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Accountant					
Analyst					
Stmnt Type	Annual	Annual	Annual	Annual	Annual
LIQUIDITY					
Working Capital	973	1,205	930	1,060	969
Quick Ratio	0.79	0.86	0.75	0.76	0.72
Current Ratio	1.30	1.38	1.22	1.24	1.19
LEVERAGE / COVERAGE					
Net Worth-Actual	1,671	2,061	2,390	2,742	3,201
Tang Net Worth-Actual	1,671	2,061	2,390	2,742	3,201
Eff Tang Net Worth-Actual	1,671	2,061	2,390	2,742	3,201
Debt/Worth	2.54	2.00	2.20	2.06	2.14
Debt/Tang Worth	2.54	2.00	2.20	2.06	2.14
Debt Less Sub Debt-Liability/Eff Tg Wth	2.54	2.00	2.20	2.06	2.14
Total Liabilities/Total Assets	0.72	0.67	0.69	0.67	0.68
Interest Coverage	1.61	5.95	4.55	3.73	2.04
Funds Flow Coverage	1.28	2.49	2.38	2.36	1.27
Funds Flow/Prior Period CPLTD		2.55	2.51	2.77	2.33
UCA Cash Flow Coverage		1.12	2.66	1.48	1.14
UCA Cash Flow/Prior Period CPLTD		1.14	2.76	1.64	1.80
EBITDA	441	988	971	1,196	935
EBIDA	432	839	733	948	1,019
Fully Loaded FCC Ratio	1.61	5.95	4.55	3.73	2.04
PROFITABILITY (%)					
Return on Assets	1.42	6.30	4.29	4.19	2.58
Return on Equity	5.03	18.92	13.72	12.84	8.09
Gross Margin	21.42	24.66	23.14	24.67	24.07
Operating Profit Margin	0.72	2.65	2.03	2.43	1.12
Profit Margin	0.39	1.61	1.19	1.25	0.84
Dividend Payout Rate	-	-	-	-	-
Effective Tax Rate	9.68	27.64	42.05	41.33	(48.00)
ACTIVITY					
Net Accounts Receivable Days	37.28	38.60	36.99	40.00	37.53
Inventory Days on Hand	35.34	33.07	33.80	35.97	35.12
Accounts Payable Days	60.66	51.39	56.58	59.53	58.35
Net Sales/Total Assets	3.64	3.92	3.60	3.36	3.05
Net Sales/Working Capital	22.14	20.11	29.60	26.64	31.65
Net Sales/Net Worth	12.89	11.76	11.52	10.30	9.58
Net Sales/Net Fixed Assets	13.56	15.19	12.27	10.59	8.78
Profit Before Taxes/Total Assets (%)	1.57	8.71	7.41	7.14	1.74
Z - Score	4.54	5.22	4.72	4.54	3.96
GROWTH (%)					
Total Assets Growth		4.67	23.49	9.96	19.54
Total Liabilities Growth		(2.69)	27.25	7.79	20.89
Net Worth Growth		23.34	15.96	14.73	16.74
Net Sales Growth		12.48	13.62	2.58	8.63
Operating Profit Growth		312.18	(12.91)	22.68	(50.07)
Net Profit Growth		364.29	(15.90)	7.32	(26.42)
Sustainable Growth	5.29	23.34	15.91	14.73	8.80

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Accountant					
Analyst					
Stmt Type	Annual	Annual	Annual	Annual	Annual
NET REVENUES		24,228	27,527	28,236	30,672
Net Profit Before Extraordinary Items		390	328	352	259
Depreciation and Amortization		345	411	509	592
Rent Expense		-	-	-	-
Interest Expense		108	123	184	168
Tax Expense		149	238	248	(84)
EBITDAR		992	1,100	1,293	935
Non-Recurring (Income) & Expenses		-	-	-	-
RECURRING EBITDAR		992	1,100	1,293	935
Less: Rent Expense (all operating rents/leases)		-	-	-	-
RECURRING EBITDA		992	1,100	1,293	935
Less: Cash Taxes		22	(185)	(227)	(180)
+/- Manual Adj To Cash Taxes		-	-	-	-
Less: Dividends for Taxes		-	-	-	-
RECURRING EBIDA		1,014	915	1,066	755
Less: MCAPEX		(345)	(411)	(509)	(592)
RECURRING CORE CASH FLOW		669	504	557	163
Less: Interest		(108)	(123)	(184)	(168)
Plus(Less): Adjustments to Interest Expense		-	-	-	-
Less: Principal		(288)	(295)	(311)	(365)
Plus/(Less): Adjustments to PYCM		-	-	-	-
Less: Mandatory/Priority Outflows		-	-	-	-
RECURRING DISCRETIONARY CASH FLOWS		273	86	62	(370)
Less: Discretionary Capital Expenditures		(7)	(648)	(424)	(826)
Less: Discretionary Dividends		-	-	-	-
RECURRING NET CASH FLOW		266	(562)	(362)	(1,196)
+/- Change in Adjusted Working Capital		(553)	239	(248)	325
+/- Manual Adj To Calc WC Change		-	-	-	-
RECURRING NET OPERATING CASH FLOW		(287)	(323)	(610)	(871)
KEY RATIOS FOR ANALYSIS (RECURRING BASIS)					
Funded Debt		1,098	1,397	1,592	2,360
Senior Funded Debt		1,098	1,397	1,592	2,360
Interest Coverage (Recurring EBITDA-Taxes-MCAPEX/Interest on all obligations)		6.19	4.10	3.03	0.97
Traditional DSC (Recurring EBITDA-Taxes-MCAPEX / PYCM+Interest on all obligs)		1.69	1.21	1.13	0.31
Standard Fixed Charge Coverage Ratio (YTD Actual) (Recur EBITDA - MCAPEX) / (Cash Taxes or Dividends for Taxes + Interest + (PYCM) + Mandatory Outflows)		1.73	1.14	1.09	0.48
Fully Loaded FCC Ratio (Recurring EBITDAR-CAPEX)/(PYCM+Interest on all obligs+ Discretionary Dividends+Mandatory Outflows+Rent+Taxes)		1.71	0.07	0.50	(0.68)
Cash Flow Leverage (Interims Annualized) (Funded Debt/Recurring EBITDA)		1.11	1.27	1.23	2.52
Senior Cash Flow Leverage (Interims Annualized) (Senior Funded Debt/Recurring EBITDA)		1.11	1.27	1.23	2.52
Recurring EBITDA/Net Sales (Actual)		4.09	4.00	4.58	3.05