

INFU

InfuSystem Holdings, Inc.

\$8.59

0.025 (+0.29%) 9:44 AM 02/26/26

NYSE | \$USD | Delayed

1D 5D 1M 6M YTD 1Y 5Y 10Y MAX

+8.53%



Analysis



InfuSystem: Regulatory Backed Market Catalyst

BUY First Principles Partners • Fri, Jan. 30 • Save



InfuSystem Stock: Margin Expansion And Growth Strategy To Drive Strong Gains

STRONG BUY David Zaroni • Mon, Nov. 10, 2025 • Save



InfuSystem Set To Be A Cash Cow In 2026

STRONG BUY Aaron Warwick • Mon, Nov. 10, 2025 • 5 Comments • Save



InfuSystem Holdings: Riding On The Oncology Market Opportunity

BUY First Principles Partners • Mon, Nov. 10, 2025 • Save



InfuSystem: A New Sheriff In Town

STRONG BUY Aaron Warwick • Tue, Aug. 26, 2025 • 13 Comments • Save



InfuSystem: Investments Are Starting To Pay Off

BUY Shareholders Unite • Sun, Jun. 22, 2025 • 2 Comments • Save



InfuSystem Set For Strong Year

STRONG BUY Aaron Warwick • Mon, Feb. 10, 2025 • 12 Comments • Save



InfuSystem Set For Strong Second Half

STRONG BUY Aaron Warwick • Mon, Aug. 26, 2024 • 6 Comments • Save



InfuSystem Holdings: 2024 Will Be A Year Of Monetization

STRONG BUY Aaron Warwick • Wed, Feb. 28, 2024 • 6 Comments • Save



InfuSystem: Mixed Q2 Results Are Actually Bullish

BUY Aaron Warwick • Mon, Aug. 07, 2023 • 1 Comment • Save

News



Earnings Call Insights

InfuSystem outlines 6% to 8% revenue growth for 2026 following contract restructuring

SA Insights • Tue, Feb. 24 • Save



InfuSystem Holdings, Inc. (INFU) Q4 2025 Earnings Call Transcript

SA Transcripts • Tue, Feb. 24 • Save



InfuSystem reports mixed Q4 results; introduces FY26 outlook

SA News • Tue, Feb. 24 • Save



InfuSystem Q4 Earnings Preview

SA News • Mon, Feb. 23 • Save



InfuSystem Holdings, Inc. SEC Filing - Quarterly Report (10-Q) November 04, 2025

SEC Filings • Tue, Nov. 04, 2025 • Save



Earnings Call Insights

InfuSystem reaffirms 6%–8% revenue growth and 20%+ EBITDA margin outlook as profitability strategy advances

SA Insights • Tue, Nov. 04, 2025 • Save



InfuSystem Holdings, Inc. (INFU) Q3 2025 Earnings Call Transcript

SA Transcripts • Tue, Nov. 04, 2025 • Save



InfuSystem reports mixed Q3 results; reaffirms FY25 outlook

SA News • Tue, Nov. 04, 2025 • Save



InfuSystem Q3 2025 Earnings Preview

SA News • Mon, Nov. 03, 2025 • Save



InfuSystem Holdings, Inc. SEC Filing - Quarterly Report (10-Q) August 05, 2025

SEC Filings • Tue, Aug. 05, 2025 • Save



Earnings Call Insights

InfuSystem raises adjusted EBITDA margin outlook to 20%+ as margin expansion continues amid revenue guide revision

SA Insights • Tue, Aug. 05, 2025 • Save

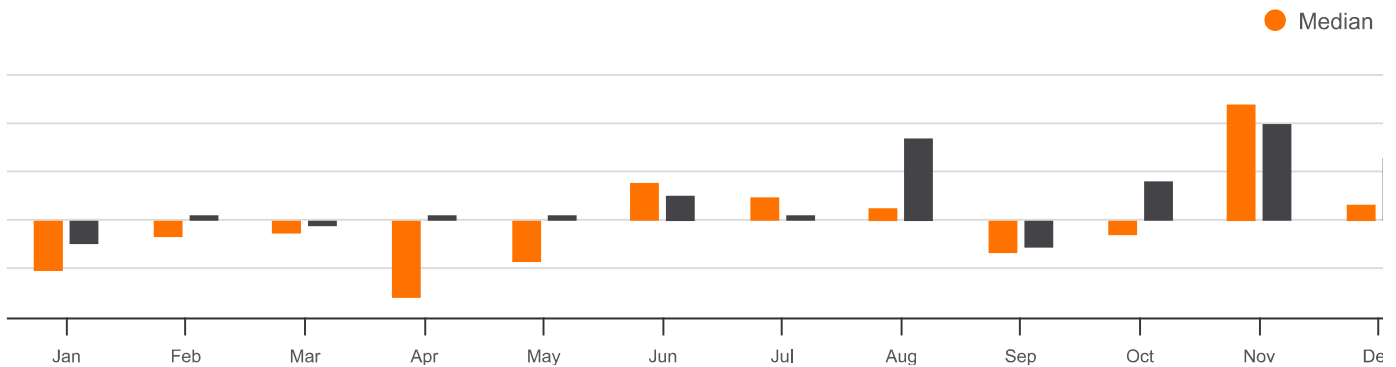


InfuSystem Holdings, Inc. (INFU) Q2 2025 Earnings Call Transcript

SA Transcripts • Tue, Aug. 05, 2025 • Save

Seasonality

Displays mean and median monthly returns for **INFU** in order to identify seasonal patterns.



Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov
Win Rate	30.0%	40.0%	50.0%	40.0%	40.0%	50.0%	70.0%	50.0%	30.0%	33.3%	70.0%
11yr Avg	-3.0%	-	-	-	-	-	-	-	-	-	-
10yr Avg	-2.5%	0.4%	-0.5%	0.3%	0.0%	2.4%	0.1%	8.4%	-2.8%	4.0%	9.8%
2026	-7.9%	-	-	-	-	-	-	-	-	-	-
2025	-4.3%	-1.4%	-32.6%	-12.3%	22.5%	8.0%	-10.3%	92.5%	-3.9%	0.0%	-10.4%
2024	-12.4%	0.2%	-7.4%	-12.4%	-4.9%	-4.3%	1.0%	-3.6%	0.8%	-7.6%	43.8%
2023	15.4%	-6.3%	-17.5%	20.9%	-6.6%	10.1%	7.2%	-0.4%	-6.2%	-0.6%	4.7%
2022	-11.3%	-23.9%	-14.7%	-19.1%	21.9%	-0.4%	1.5%	-21.1%	-9.3%	9.2%	12.5%
2021	-6.2%	-3.2%	19.3%	11.1%	-18.2%	12.4%	-12.2%	-21.9%	-8.6%	27.6%	-0.5%

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov
2020	0.6%	23.5%	-19.9%	41.9%	-3.7%	-0.6%	5.8%	19.2%	-11.9%	-3.9%	29.9%
2019	9.9%	6.9%	24.0%	-14.2%	14.0%	-12.2%	3.3%	12.2%	6.2%	31.0%	20.6%
2018	0.0%	-2.2%	28.9%	-4.9%	17.9%	9.2%	-14.1%	9.8%	-3.0%	-5.2%	11.4%
2017	-9.8%	-4.3%	4.5%	-10.9%	-26.8%	16.7%	5.7%	2.7%	7.9%	-2.4%	17.5%
2016	-7.3%	14.3%	10.0%	2.3%	-15.8%	-14.2%	13.5%	-5.4%	-0.4%	-8.3%	-31.4%

Bulls Say



The company's profitability is underestimated, and the new regulation is a major tailwind. [Read article](#)

Bears Say

Currently, no authors are bearish on this stock.

Company Profile

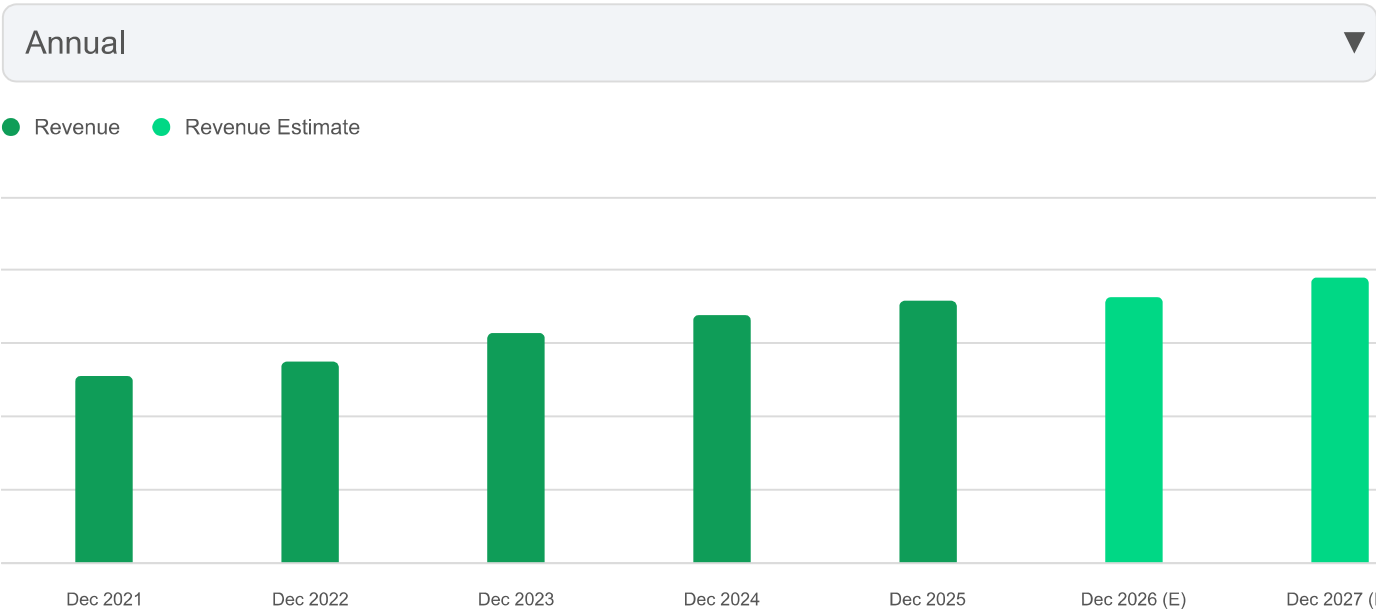


InfuSystem Holdings, Inc., through its subsidiaries, provides infusion pumps and related products and services in the United States and Canada. It operates in two segments, Patient Services and Device Solutions. The company supplies electronic ambulatory infusion pumps and associated disposable supply kits to oncology, infusion, and hospital outpatient chemotherapy clinics for the treatment of various cancers, including colorectal cancer, pain management, and other disease states. It also sells and rents new and pre-owned pole-mounted and ambulatory infusion pumps, and other durable medical equipment; sells treatment-related consumables; and provides biomedical recertification, maintenance, and repair services for oncology practices, as well as other healthcare site settings comprising hospitals, home care and home infusion providers, skilled nursing and acute care facilities, pain centers, and others. In addition, the company offers local and field-based customer support, as well as operates pump service and repair centers. The company was incorporated in 2005 and is headquartered in Rochester Hills, Michigan.

[More...](#)

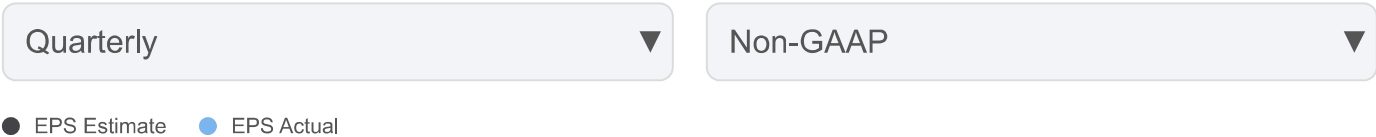
Sector	Health Care
Industry	Health Care Services
Employees	508
Founded	2005
Address	3851 West Hamlin Road Rochester Hills, MI, 48309 United States
Phone Number	248 291 1210
Website	www.infusystem.com

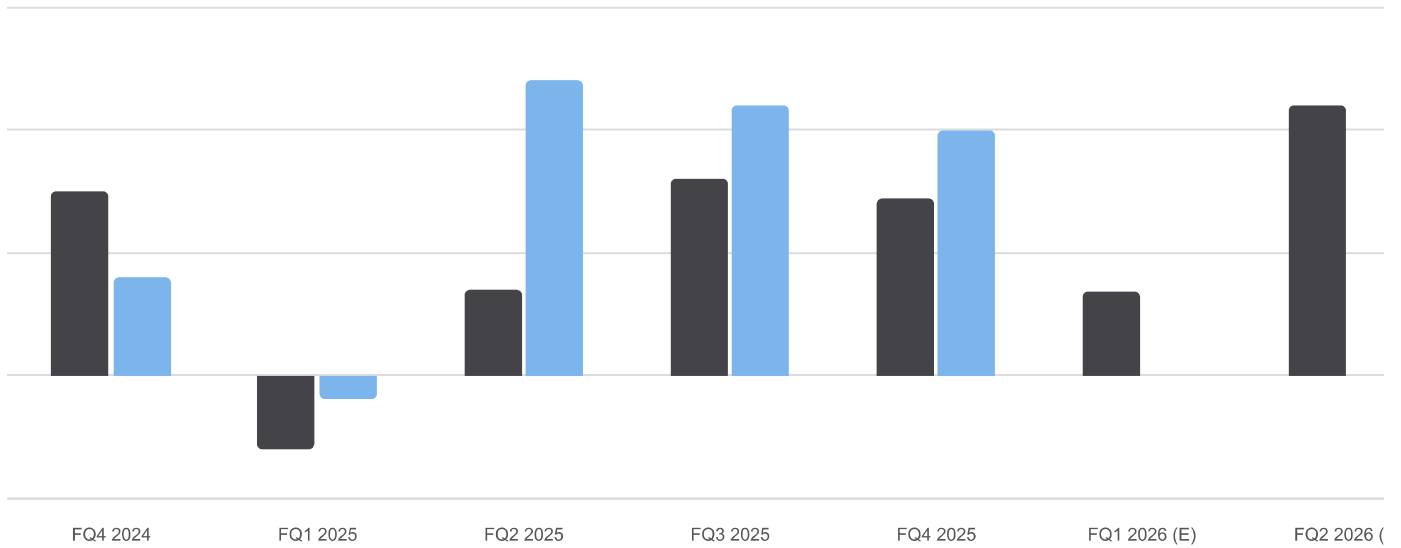
Revenue



[More On Revenue »](#)

Earnings Per Share





[More On Earnings »](#)

Earnings Estimates

FY	EPS	YoY	PE	Sales	YoY
2026	0.42	+34.19%	20.58	\$145.13M	+1.18%
2027	0.52	+24.52%	16.53	\$155.74M	+7.31%
2028	-	-	-	\$165.20M	+6.07%

[More On Earnings Estimates »](#)

Earnings Revisions

A-

FY1 Up Revisions 2

FY1 Down Revisions 1

33% Down

67% Up

[More On Earnings Revisions »](#)

Valuation

A-

P/E Non-GAAP (FWD) -

P/E GAAP (TTM) 27.61

Price/Book (TTM) 3.02

EV/Sales (TTM)	1.34
EV/EBITDA (TTM)	7.65

[More On Valuation »](#)

Growth

A+

Revenue (YoY)	6.36%
Revenue 3 Year (CAGR)	9.28%
EPS Diluted (YoY)	181.82%
EPS Diluted 3 Year (CAGR)	618.72%
Levered FCF (YoY)	769.81%

[More On Growth »](#)

Profitability

A-

Gross Profit Margin	55.98%
EBIT Margin	8.31%
Net Income Margin	4.62%
Return on Equity	11.54%
Return on Assets	6.59%

[More On Profitability »](#)

Momentum

C+

Ticker	3M	6M	9M	1Y
INFU	-11.11%	-13.27%	+58.23%	+9.46%
SP500	+2.66%	+7.87%	+19.70%	+16.64%

52 Week Range



[More On Momentum »](#)

Capital Structure

Market Cap	\$172.99M
Total Debt	\$23.05M
Cash	\$3.19M
Other	-
Enterprise Value	\$192.86M

Insider Selling & Buying

Date ▾	Name	Title	Transaction Type	# Shares	Share Price	< >
Oct. 14, 2025	Jerod Funke	Executive VP & Chief HR Officer	Sell	3,669	9.61	35,259.
Aug. 22, 2025	Scott Shuda	Director	Sell	5,752	9.67	55,621.
Aug. 22, 2025	Scott Shuda	Director	Sell	5,752	9.81	56,455
May 28, 2025	Kenneth Eichenbaum	Independent Director	Buy	2,000	5.18	10,360
May 20, 2025	Carrie Lachance	President, CEO & Director	Sell	6,090	6.15	37,453.
May 20, 2025	Addam Chupa	Executive VP & Chief Information Officer	Sell	3,660	6.15	22,509
May 20, 2025	Ronald Hundzinski	Independent Chairman of the Board	Buy	5,000	6.09	30,450
May 20, 2025	Barry Steele	Executive VP & CFO	Sell	5,946	6.15	36,567.
May 20, 2025	Richard Dilorio	Former Chief Executive Officer	Sell	19,509	6.15	119,980
May 19, 2025	Carrie Lachance	President, CEO & Director	Buy	3,132	6.06	18,986.
May 14, 2025	Barry Steele	Executive VP & CFO	Buy	3,000	5.76	17,280
Mar. 11, 2025	Richard Dilorio	Former Chief Executive Officer	Buy	7,024	2.60	18,262.
Mar. 11, 2025	Richard Dilorio	Former Chief Executive Officer	Sell	17,976	3.58	64,354.
Nov. 27, 2024	Richard Dilorio	Former Chief Executive Officer	Sell	40,000	9.11	364,465
Nov. 05, 2024	Addam Chupa	Executive VP & Chief Information Officer	Sell	8,720	6.19	53,976.

Ownership

Type	Common Stock Held	% of Shares Outstanding	Market Value	Composition
● Institutions	16.16M	79.47%	138.74M	
● Individuals / Insiders	1.08M	5.30%	9.25M	
● Public and Other	3.10M	15.24%	26.60M	
Total	20.34M	100.00%	174.59M	

Peers

Title	NNOX	QIPT	AGL	NAKA
Company name	Nano-X Imaging Ltd.	Quipt Home Medical Corp.	agilon health, inc.	Nakamoto Inc.
Industry	Health Care Services	Health Care Services	Health Care Services	Health Care Services
Market Cap	169.56M	159.92M	207.43M	113.09M
Employees	165	1,500	1,076	42
Quant Rating	STRONG SELL	HOLD	HOLD	STRONG SELL
SA Analysts Rating	NOT COVERED	NOT COVERED	NOT COVERED	NOT COVERED
Wall Street Rating	STRONG BUY	SELL	HOLD	STRONG BUY

[More On Peers »](#)

Risk

Short Interest	0.59%
Shares Short	119.02K
Days to Cover	1.00
24M Beta	1.83
Altman Z Score	3.38

Technicals

Title	10D SMA	50D SMA	200D SMA
Simple Moving Average	7.85	8.48	8.29

Title	10D SMA	50D SMA	200D SMA
Last Price vs SMA	+9.03%	+0.98%	+3.31%

[More On Moving Averages »](#)

Income Statement

Revenue (TTM)	143.44M
Revenue Per Share	6.94
Gross Profit (TTM)	80.30M
EBITDA (TTM)	25.21M
Net Income (TTM)	6.63M
EPS Diluted (TTM)	\$0.31

[Full Income Statement »](#)

Balance Sheet

Total Cash (MRQ)	3.19M
Total Cash Per Share	0.16
Total Debt (MRQ)	23.05M
Total Debt to Equity (MRQ)	40.21%
Current Ratio (MRQ)	1.80
Quick Ratio (MRQ)	1.29

[Full Balance Sheet »](#)

Cash Flow Statement

Cash from Operations (TTM)	24.41M
Cash from Investing (TTM)	-6.79M
Levered Free Cash Flow (TTM)	18.18M
Unlevered Free Cash Flow (TTM)	18.91M
Free Cash Flow / Share (TTM)	\$0.76

Long Term Solvency

Total Debt / Equity (MRQ)	40.21%
Total Debt / Capital (MRQ)	28.68%
LT Debt / Equity (MRQ)	40.21%
LT Debt / Total Capital (MRQ)	28.68%
Total Liabilities / Total Assets (MRQ)	42.99%