LITMUS HISTORICAL INTELLIGENCE REPORT

Dolomite: USD1 Market

Ethereum

Historical period: Jun 11, 2026 – Aug 24, 2026

Pool ID: `86e18974-35ca-4948-9c82-694facf9d082`

Snapshot coverage: 13 of 13 weekly snapshots (complete series, no gaps)

Prepared by Litmus, Independent DeFi Pool Intelligence

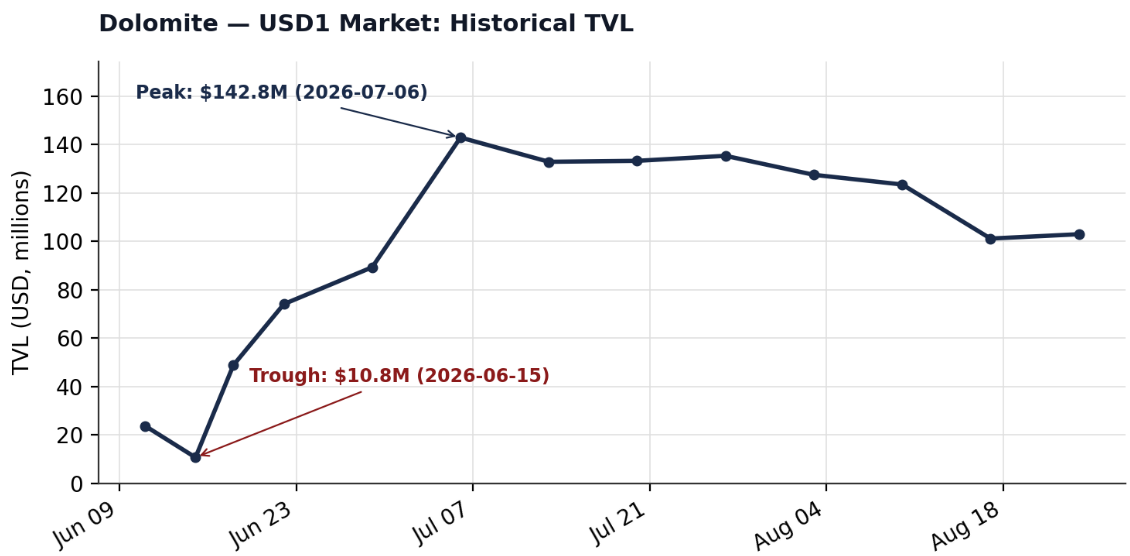
1. Executive Summary

- TVL moved from $23.8M on Jun 11, 2026 to $102.9M on Aug 24, 2026, an increase of +331.9% (4.32× the starting value), after reaching a peak of $142.8M on Jul 6, 2026 (5.99× the starting value).
- APY moved from 12.05% to 8.56%, a change of -3.49 percentage points, with a series high of 16.97% on Jun 15, 2026 and a series low of 7.01% on Jul 6, 2026.
- The Litmus score moved from 74 (Grade B) to 78 (Grade B), a net change of +4 points, after ranging between a low of 62 on Jun 15, 2026 and a high of 78 first reached on Jun 29, 2026.
- The most significant single-week event in the series occurred between Jun 29, 2026 and Jul 6, 2026, when TVL rose by $53.6M (+60.0%), the largest absolute-dollar weekly move of the period, carrying the pool to its historical peak.

2. Pool Overview

Protocol	Dolomite
Market	USD1
Chain	Ethereum
Pool ID	86e18974-35ca-4948-9c82-694facf9d082
Snapshot coverage	13 of 13 weekly snapshots
Historical period	Jun 11, 2026 – Aug 24, 2026
Starting TVL	$23,831,398 (Jun 11, 2026)
Ending TVL	$102,933,998 (Aug 24, 2026)
Peak TVL	$142,847,902 (Jul 6, 2026)
Trough TVL	$10,774,026 (Jun 15, 2026)
Starting APY	12.05% (Jun 11, 2026)
Ending APY	8.56% (Aug 24, 2026)
Starting Litmus grade	B (score 74)
Ending Litmus grade	B (score 78)

3. Historical TVL

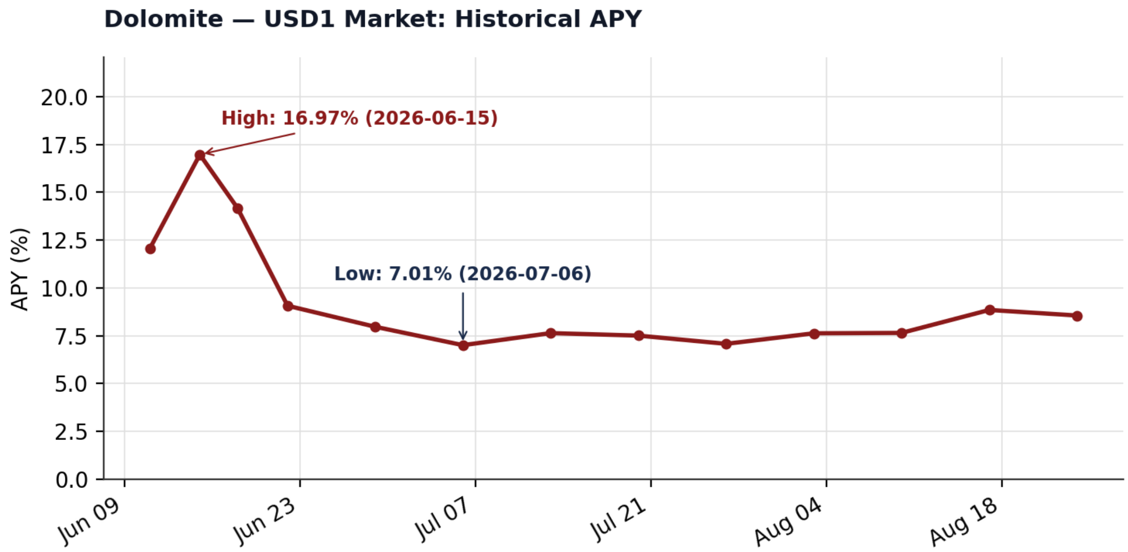


TVL did not move in a single, uniform direction across the period. It opened at $23.8M, fell to its series trough of $10.8M on Jun 15, 2026 (a decline of -54.8% in the first week alone), then rose sharply and near-continuously through Jul 6, 2026, when it reached its series peak of $142.8M, 5.99× the starting value.

Following the peak, TVL held in a relatively narrow $123M–$135M band for roughly five weeks before declining again, including a single-week drop of $22.3M (-18.1%) between Aug 10, 2026 and Aug 17, 2026. By the final snapshot, TVL stood at $102.9M, 27.9% below the historical peak, but still 4.32× the starting value.

The overall shape is best described as an initial contraction, followed by a rapid capital inflow to a peak roughly four weeks into the period, then a partial and uneven retracement toward a level still well above where the series began. This is not "steady growth": more than half of the total gain from start to peak occurred in the two weeks between Jun 15, 2026 and Jun 29, 2026, plus the single large jump into Jul 6, 2026.

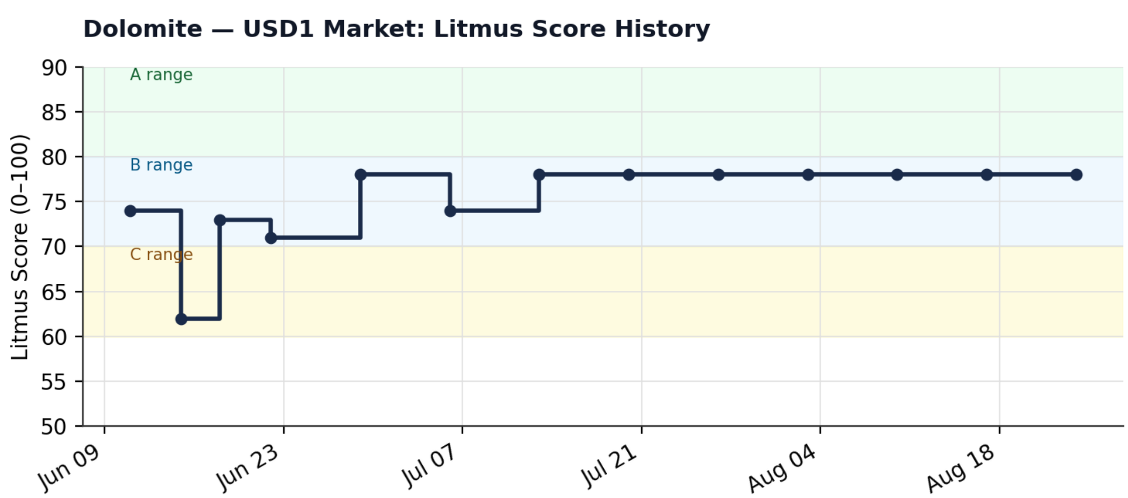
4. Historical APY



APY opened at 12.05%, rose to a series high of 16.97% on Jun 15, 2026 (an increase of +4.92 percentage points from the prior snapshot), then declined for four consecutive snapshots to a series low of 7.01% on Jul 6, 2026, the same date TVL reached its historical peak. APY then held in a relatively narrow 7.0%–9.0% band for the remainder of the period, closing at 8.56%, a net change of -3.49 percentage points from the start of the series.

TVL increased sharply between Jun 15, 2026 and Jul 6, 2026 while APY declined over roughly the same window, moving from its series high to its series low. Taken together, the observed pattern is consistent with the pool's yield normalizing as capital increased. This description is limited to what the data shows; Litmus has not independently verified the cause of the capital inflow itself.

5. Litmus Score History



The Litmus score opened at 74 (Grade B) on Jun 11, 2026, fell to a series low of 62 (Grade C) on Jun 15, 2026 (the same snapshot in which TVL reached its trough), and then recovered. The score first reached its series high of 78 on Jun 29, 2026, dipped modestly on two later occasions, and has held at 78 continuously from Jul 13, 2026 through the final snapshot on Aug 24, 2026. The net change from start to end of the period was +4 points, and the grade was B at both the start and end of the series.

> *Litmus scores are independent, point-in-time assessments generated from the methodology used by Litmus. Commercial relationships do not alter the score.*

6. Key Historical Findings

- Net capital growth: TVL increased +331.9% from Jun 11, 2026 to Aug 24, 2026 ($23.8M → $102.9M), equivalent to 4.32× the starting value.
- Peak and subsequent partial normalization: TVL reached 5.99× the starting value at its Jul 6, 2026 peak of $142.8M, then declined 27.9% to the ending level, still 855.4% above the series trough.
- APY compression coincident with the TVL peak: APY fell from a high of 16.97% to a low of 7.01% (a range of 9.96 percentage points) over the same window that TVL rose to its peak.
- Grade stability at the upper end of its range: despite a +4-point net change and a 16-point range across the series, the grade was B at both the first and last snapshot, and the score has been unchanged at 78 for seven consecutive snapshots (Jul 13, 2026 – Aug 24, 2026).
- Largest single-week moves: the largest absolute TVL increase was $53.6M (Jun 29, 2026 → Jul 6, 2026); the largest percentage increase was +353.4% (Jun 15, 2026 → Jun 18, 2026), reflecting two different weeks, since the pool was much smaller in dollar terms during the earlier, higher-percentage move.

7. Historical Timeline

Jun 11, 2026: Initial snapshot: TVL $23,831,398, APY 12.05%, Grade B (score 74).

Jun 15, 2026: TVL fell to its series trough of $10,774,026; APY reached its series high of 16.97%; the Litmus score fell to its series low of 62 (Grade C).

Jun 18, 2026: TVL rose +353.4% week-over-week, the largest percentage increase observed in the series.

Jun 29, 2026: Litmus score first reached its series high of 78 (Grade B).

Jul 6, 2026: TVL rose $53.6M week-over-week to reach its series peak of $142,847,902; APY fell to its series low of 7.01% the same day.

Aug 17, 2026: TVL fell $22.3M (-18.1%) week-over-week, the largest single-week dollar decline in the series.

Aug 24, 2026: Final snapshot: TVL $102,933,998, APY 8.56%, Grade B (score 78).

8. Current Position Relative to Its Own History

"Current" in this section refers to the final available historical snapshot, Aug 24, 2026, not present-day external TVL. As of that snapshot:

- TVL of $102,933,998 stood 27.9% below the historical peak of $142,847,902, and 855.4% above the historical trough of $10,774,026.
- TVL was 4.32× the level recorded at the start of the observed period.
- APY of 8.56% sat within the observed historical range of 7.01% to 16.97%, closer to the low end of that range.

- The Litmus score of 78 was at the top of the observed historical range (62–78), and had been stable at that level for seven consecutive snapshots.

9. Methodology & Data Quality

Data source

Data was drawn from 13 weekly historical snapshots collected between Jun 11, 2026 and Aug 24, 2026, sourced from the Litmus historical grade dataset (quickyield-scanner, data/grades).

Pool identification

The pool was identified strictly by its unique pool identifier, 86e18974-35ca-4948-9c82-694facf9d082, and this identifier was matched against every one of the 13 snapshot files independently. Identification was not performed by project name, symbol, or chain label, since more than one pool in the dataset can share an identical name/symbol/chain combination. A check of the full August 24, 2026 snapshot confirmed only one pool matches project "dolomite" and symbol "USD1" on Ethereum, and its identifier matches the one used throughout this report.

TVL methodology

TVL figures reflect the tvlUsd field recorded in each snapshot, denominated in U.S. dollars at the time of collection.

APY methodology

APY figures reflect the apy field recorded in each snapshot. Litmus does not independently decompose this figure into base and incentive yield components; it is reported as sourced.

Litmus score methodology

The Litmus score and letter grade are Litmus's independent, point-in-time risk/quality assessment as recorded at each snapshot. Scores are not adjusted retroactively and are not influenced by commercial relationships with the protocol being assessed.

Limitations

- This report covers only the snapshot dates available in the dataset; conditions between snapshots are not observed and may have differed from the interpolated trend shown in the charts.
- Snapshot cadence is approximately weekly but not perfectly uniform; the interval between the first four snapshots (Jun 11–Jun 22) is shorter than later intervals.
- No cause is asserted for any TVL, APY, or score movement beyond what is directly observable in the dataset. Any description of coincident movements (e.g., TVL rising as APY falls) is descriptive, not causal.

Data-quality checks performed

- Confirmed exactly 13 of 13 snapshot files contain a record for this pool ID, with no gaps.
- Confirmed project, symbol, and chain labels are identical (dolomite / USD1 / Ethereum) across all matched records.
- Confirmed no other pool in the most recent snapshot shares the same project and symbol on any chain.
- All figures in this report were generated programmatically from the matched time series; no metric was manually estimated.

This report is historical, observational analysis of publicly observable pool data. It is not investment advice and does not predict future performance.