# Socket Mobile, Inc.

**SCKT**

Nasdaq; business equipment; SIC 3571, Electronic Computers; CIK 0000944075

**E**

**weakest fifth of 497 graded peers in business equipment**

rank 424 of 497; percentile 85.3; sampling error 2.2 points; lower is stronger

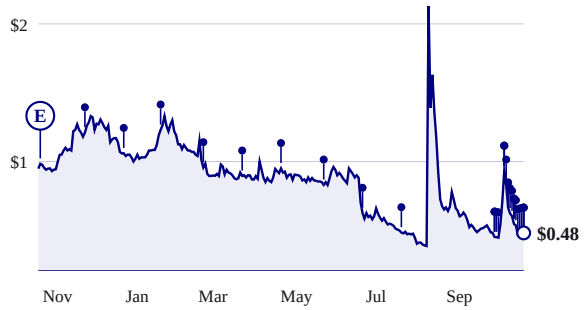
A B C D E

**E, the bear**



| Scoreboard | |
|---|---|
| **Profitability** | A/B<br>percentile 18.8 |
| **Solvency** | E<br>percentile 82.7 |
| **Growth and financing** | E<br>percentile 90.1 |
| **Reliability** | 0.83 AUC<br>filers with $12.5M to $120M assets; 95% interval 0.79 to 0.86; 201 events, 2020 to 2025 |
| **Peer failure rate** | 1.07% a year<br>Item 1.03 bankruptcies, same asset band, 2012 to 2025 |
| **Size band** | $12.5M to $120M assets<br>total assets $14.4M |
| **Standard universe** | inside<br>revenue above $1M and assets above $10M |
| **Warnings** | none triggered; fortress balance sheet<br>not computable: dilution, distress |
| **Inputs computable** | 8 of 14 |
| **Graded from** | filings received through Mar 30, 2026<br>204 days before the rescan; latest periodic filing 10-Q received Aug 13, 2026 |
| **Last close** | $0.47<br>2026-10-19; market equity $3.9M; no price enters the letter |

**Share price, twelve months to the rescan**




*Split-adjusted close. Each lollipop is a rescan and carries the letter held then.*

**Letter at every rescan, 2012 to 2026**




*Sector percentile at each rescan, stronger toward the top; facts filed by each date only.*

## Business, in the company's words

*opening of Item 1 of the 10-K received Mar 30, 2026*

solutions for enhanced productivity in workforce mobilization. Our products are incorporated into mobile applications used in point of sale (POS), commercial services (field workers), asset tracking, manufacturing process and quality control, transportation and logistics (goods tracking and movement), event management (ticketing, entry, access control, and identification), medical and education. Our primary products are cordless data capture devices incorporating barcode scanning or RFID/Near Field Communications (NFC) technologies that connect over Bluetooth.

## The fourteen inputs

*lower percentile is stronger; sleeves and inputs within a sleeve carry equal weight*

| Input | Value | Peer median | Percentile, 0 to 100 | Pct | Peers | Period end |
|---|---|---|---|---|---|---|
| **Profitability, sleeve percentile 18.8** | | | | | | |
| Gross profitability | 51.9% | 28.6% | | 15.1 | 557 | 2025-12-31 |
| Return on invested capital | not computable | 11.0% | | | | |

*one or more required annual facts are missing*

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| | | | | | |
|---|---|---|---|---|---|
| Accruals ratio | (62.8%) | (7.4%) | 4.4 | 620 | 2025-12-31 |
| Gross margin stability, five years | 1.7 pts | 2.3 pts | 36.9 | 427 | 2025-12-31 |
| **Solvency, sleeve percentile 82.7** | | | | | |
| Twelve-month failure probability | not computable | 0.05% | | | |
| *latest liabilities, cash plus short-term investments, book equity, and shares are required* | | | | | |
| Altman Z double-prime | (15.54) | 2.16 | 84.9 | 564 | 2025-12-31 |
| Net debt to EBITDA | not computable | 1.11x | | | |
| *latest aligned inputs end 2019-12-31; latest annual assets end 2025-12-31* | | | | | |
| Interest coverage | (6.48x) | 3.77x | 82.8 | 88 | 2025-12-31 |
| Current ratio | 1.02x | 2.01x | 80.4 | 664 | 2025-12-31 |
| **Growth and financing, sleeve percentile 90.1** | | | | | |
| Revenue growth, three-year compound | (10.8%) | 6.4% | 87.7 | 537 | 2025-12-31 |
| Free cash flow growth, three-year compound | not computable | 17.7% | | | |
| *current FCF must be positive and base FCF must exceed $100,000* | | | | | |
| Reinvestment rate | not computable | 13.5% | | | |
| *one or more required annual facts are missing* | | | | | |
| Asset growth, three years | (20.4%) | 5.0% | 92.5 | 562 | 2025-12-31 |
| Net share issuance, one year | not computable | 0.5% | | | |
| *prior share count is 721 days earlier* | | | | | |

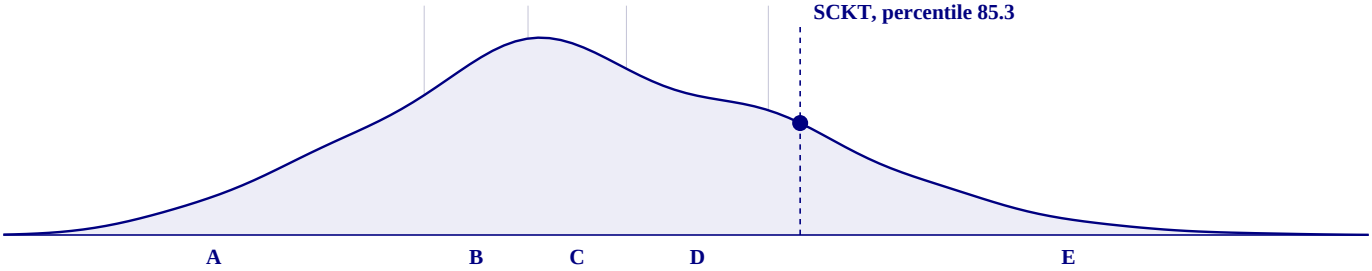
## Warnings

*1 of 7 checks triggered; none of them enters the letter*

| Check | Measured |
|---|---|
| Fortress balance sheet | cash minus debt is 958,860 USD; Altman Z is not used |

## Among 497 peers

*business equipment; letters are fifths of this list*




*Composite score of every graded peer, smoothed; vertical rules are the letter band edges; stronger to the left.*

| Rank | Company | Percentile | Letter | Warnings |
|---|---|---|---|---|
| 419 | Magnite, Inc. (MGNI) | 84.3 | E | |
| 420 | Pacific Biosciences OF California, Inc. (PACB) | 84.5 | E | |
| 421 | Vistance Networks, Inc. (VISN) | 84.7 | E | |
| 422 | Methode Electronics Inc. (MEI) | 84.9 | E | |
| 423 | Revvity, Inc. (RVTY) | 85.1 | E | |
| 424 | Socket Mobile, Inc. (SCKT) | 85.3 | E | fortress balance sheet |
| 425 | Cerence Inc. (CRNC) | 85.5 | E | |
| 426 | Enphase Energy, Inc. (ENPH) | 85.7 | E | |
| 427 | Open Text Corp. (OTEX) | 85.9 | E | |
| 428 | Xperi Inc. (XPER) | 86.1 | E | fortress balance sheet |
| 429 | My Size, Inc. (MYSZ) | 86.3 | E | dilution, short runway, late filer |

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## What the price implies

*at the 2026-10-19 close; none of these enters the grade*

| Measure | Value | Peer median | Percentile |
|---|---|---|---|
| Twelve-month price change, skipping the latest month | (37.7%) | 2.2% | 18 |
| Distance from 52-week high | (77.4%) | (31.8%) | 8 |
| EBIT to enterprise value | (135.0%) | 1.5% | 4 |
| Free cash flow yield | (44.8%) | 2.8% | 8 |
| Book value to price | 0.60 | 0.25 | 78 |
| Sales to price | 3.78 | 0.33 | 94 |
| Composite equity issuance, five years | 17.8% | 4.2% | 69 |
| Relative strength against the sector, log excess return | (0.76) | (0.26) | 18 |

## Diagnostics

*shown on every report; none enters the grade*

| Measure | Value |
|---|---|
| **Piotroski F-score None of 9, period end 2025-12-31** | |
| Return on assets above zero | fail |
| Operating cash flow above zero | fail |
| Return on assets improved | fail |
| Operating cash flow exceeds net income | pass |
| Long-term leverage fell | fail |
| Current ratio improved | fail |
| No new shares issued | fail |
| Gross margin improved | fail |
| Asset turnover improved | fail |
| **Cash, filings, liquidity** | |
| Cash and equivalents | $1.6M |
| Operating cash flow, four quarters | -$685,317 |
| Months of runway | 28.1 |
| Days since last periodic filing | 68 (10-Q received Aug 13, 2026) |
| Median daily dollar volume, 63 sessions | $64,305 |

## Sources

*every fact behind the inputs; each row links to its filing index on sec.gov*

| # | Concept | XBRL tag | Value | Period end | Received | Form | Accession |
|---|---|---|---|---|---|---|---|
| 1 | gross profit | us-gaap:GrossProfit | $7.5M | 2025-12-31 | 2026-03-30 | 10-K | 26-000027 |
| 2 | assets | us-gaap:Assets | $14.4M | 2025-12-31 | 2026-03-30 | 10-K | 26-000027 |
| 3 | net income | us-gaap:NetIncomeLoss | -$14.4M | 2025-12-31 | 2026-03-30 | 10-K | 26-000027 |
| 4 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | -$1.2M | 2025-12-31 | 2026-03-30 | 10-K | 26-000027 |
| 5 | assets | us-gaap:Assets | $27.3M | 2024-12-31 | 2026-03-30 | 10-K | 26-000027 |
| 6 | revenue | us-gaap:Revenues | $15.1M | 2025-12-31 | 2026-03-30 | 10-K | 26-000027 |
| 7 | gross profit | us-gaap:GrossProfit | $9.5M | 2024-12-31 | 2026-03-30 | 10-K | 26-000027 |
| 8 | revenue | us-gaap:Revenues | $18.8M | 2024-12-31 | 2026-03-30 | 10-K | 26-000027 |
| 9 | gross profit | us-gaap:GrossProfit | $8.5M | 2023-12-31 | 2025-03-25 | 10-K | 25-000013 |
| 10 | revenue | us-gaap:Revenues | $17.0M | 2023-12-31 | 2025-03-25 | 10-K | 25-000013 |
| 11 | gross profit | us-gaap:GrossProfit | $10.4M | 2022-12-31 | 2024-03-25 | 10-K | 24-000015 |
| 12 | revenue | us-gaap:Revenues | $21.2M | 2022-12-31 | 2024-03-25 | 10-K | 24-000015 |
| 13 | gross profit | us-gaap:GrossProfit | $12.4M | 2021-12-31 | 2023-03-31 | 10-K | 23-000025 |
| 14 | revenue | us-gaap:Revenues | $23.2M | 2021-12-31 | 2023-03-31 | 10-K | 23-000025 |
| 15 | current assets | us-gaap:AssetsCurrent | $8.6M | 2025-12-31 | 2026-03-30 | 10-K | 26-000027 |
| 16 | current liabilities | us-gaap:LiabilitiesCurrent | $8.4M | 2025-12-31 | 2026-03-30 | 10-K | 26-000027 |
| 17 | retained earnings | us-gaap:RetainedEarningsAccumulatedDeficit | -$64.6M | 2025-12-31 | 2026-03-30 | 10-K | 26-000027 |
| 18 | operating income | us-gaap:OperatingIncomeLoss | -$3.2M | 2025-12-31 | 2026-03-30 | 10-K | 26-000027 |

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| | | | | | | | |
|---|---|---|---|---|---|---|---|
| 19 | book equity | us-gaap:StockholdersEquity | $4.3M | 2025-12-31 | 2026-03-30 | 10-K | 26-000027 |
| 20 | liabilities | us-gaap:Liabilities | $10.2M | 2025-12-31 | 2026-03-30 | 10-K | 26-000027 |
| 21 | total debt | us-gaap:LongTermDebtAndCapitalLeaseObligations | $0 | 2019-12-31 | 2020-03-26 | 10-K | 20-000012 |
| 22 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $958,860 | 2019-12-31 | 2022-03-31 | 10-K | 22-000022 |
| 23 | operating income | us-gaap:OperatingIncomeLoss | $606,370 | 2019-12-31 | 2021-03-23 | 10-K | 21-000026 |
| 24 | depreciation amortization | us-gaap:Depreciation | $419,856 | 2019-12-31 | 2021-03-23 | 10-K | 21-000026 |
| 25 | interest expense | us-gaap:InterestExpense | -$496,587 | 2025-12-31 | 2026-03-30 | 10-K | 26-000027 |
| 26 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $537,135 | 2025-12-31 | 2026-03-30 | 10-K | 26-000027 |
| 27 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | -$521,485 | 2024-12-31 | 2026-03-30 | 10-K | 26-000027 |
| 28 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $788,325 | 2024-12-31 | 2026-03-30 | 10-K | 26-000027 |
| 29 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $48,562 | 2023-12-31 | 2025-03-25 | 10-K | 25-000013 |
| 30 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $2.2M | 2023-12-31 | 2025-03-25 | 10-K | 25-000013 |
| 31 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | -$111,415 | 2022-12-31 | 2024-03-25 | 10-K | 24-000015 |
| 32 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $1.2M | 2022-12-31 | 2024-03-25 | 10-K | 24-000015 |
| 33 | assets | us-gaap:Assets | $28.7M | 2023-12-31 | 2025-03-25 | 10-K | 25-000013 |
| 34 | assets | us-gaap:Assets | $28.6M | 2022-12-31 | 2024-03-25 | 10-K | 24-000015 |
| 35 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 8,222,958 | 2026-03-13 | 2026-03-30 | 10-K | 26-000027 |
| 36 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 7,547,327 | 2024-03-22 | 2024-03-25 | 10-K | 24-000015 |

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