Intensity Therapeutics, Inc.

INTS

Nasdaq; healthcare; SIC 2836, Biological Products, (No Diagnostic Substances); CIK 0001567264

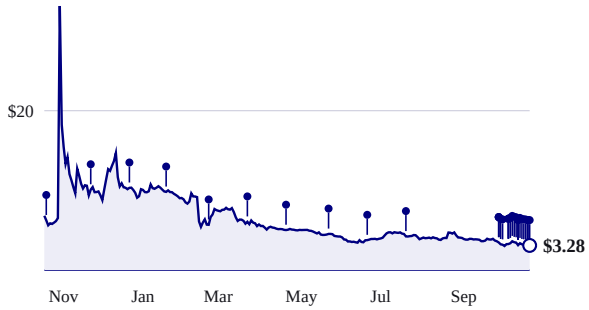
None

No letter

5 of 14 inputs computable; 7 are required, with a score in every sleeve

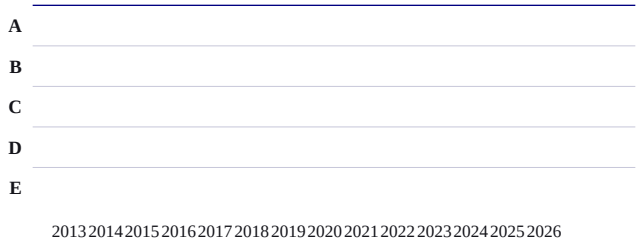
Scoreboard	
Reliability	0.83 AUC filers with $12.5M to $120M assets; 95% interval 0.79 to 0.86; 201 events, 2020 to 2025
Peer failure rate	1.07% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$12.5M to $120M assets total assets $14.1M
Warnings	dilution, thin data, distress not computable: degenerate inputs, fortress balance sheet
Inputs computable	5 of 14
Graded from	filings received through Mar 27, 2026 208 days before the rescan; latest periodic filing 10-Q received Aug 11, 2026
Last close	$3.24 2026-10-16; market equity $10.6M; 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 27, 2026

Intensity Therapeutics, Inc. is a late-stage clinical biotechnology company passionately committed to applying scientific leadership in the field of localized cancer reduction leading to anti-cancer immune activation. Our new approach involves the direct injection into tumors of a unique product created from our DfuseRxSM discovery platform. Intratumoral ("IT") treatment, or treatment designed to contain a drug inside a tumor without spreading to the rest of the body, has been an objective of clinicians since discovery of chemotherapeutic agents.

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 17.1						
Gross profitability	not computable	32.3%				
one or more required annual facts are missing						
Return on invested capital	not computable	9.3%				

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one or more required annual facts are missing					
Accruals ratio	(25.1%)	(6.6%)	17.1	812	2025-12-31
Gross margin stability, five years	not computable	2.8 pts			
five annual gross margins are required; found 0					
Solvency, sleeve percentile 63.3					
Twelve-month failure probability	1.53%	0.06%	91.5	247	2026-06-30
Altman Z double-prime	(13.31)	(0.30)	67.3	757	2025-12-31
Net debt to EBITDA	not computable	1.82x			
one or more required annual facts are missing					
Interest coverage	not computable	(4.51x)			
latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31					
Current ratio	5.92x	2.96x	31.0	840	2025-12-31
Growth and financing, sleeve percentile 92.1					
Revenue growth, three-year compound	not computable	10.1%			
four annual observations are required; found 0					
Free cash flow growth, three-year compound	not computable	10.9%			
four consecutive annual FCF observations are required; found 0					
Reinvestment rate	not computable	37.1%			
one or more required annual facts are missing					
Asset growth, three years	not computable	2.1%			
four annual observations are required; found 3					
Net share issuance, one year	318.4%	2.4%	92.1	633	2026-03-26

Warnings

3 of 7 checks triggered; none of them enters the letter

Check	Measured
Dilution	split-adjusted year-over-year share growth is 318.4%
Thin data	5 of 14 grade factors are computable; minimum is 7
Distress	CHS probability 1.533283%; universe top-decile threshold 0.948488%

What the price implies

at the 2026-10-16 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(30.6%)	8.0%	24
Distance from 52-week high	(90.1%)	(29.7%)	5
EBIT to enterprise value	not computable	(1.5%)	
Free cash flow yield	not computable	(1.0%)	
Book value to price	0.86	0.28	83
Sales to price	not computable	0.30	
Composite equity issuance, five years	not computable	20.5%	
Relative strength against the sector, log excess return	(0.58)	(0.13)	24

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	pass

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No new shares issued	fail
Gross margin improved	fail
Asset turnover improved	fail

Cash, filings, liquidity

Cash and equivalents	$9.5M
Operating cash flow, four quarters	-$9.0M
Months of runway	12.8
Days since last periodic filing	71 (10-Q received Aug 11, 2026)
Median daily dollar volume, 63 sessions	$66,310

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	net income	us-gaap:NetIncomeLoss	-$11.6M	2025-12-31	2026-03-27	10-K	26-000024
2	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$9.2M	2025-12-31	2026-03-27	10-K	26-000024
3	assets	us-gaap:Assets	$14.1M	2025-12-31	2026-03-27	10-K	26-000024
4	assets	us-gaap:Assets	$4.8M	2024-12-31	2026-03-27	10-K	26-000024
5	current assets	us-gaap:AssetsCurrent	$12.7M	2025-12-31	2026-03-27	10-K	26-000024
6	current liabilities	us-gaap:LiabilitiesCurrent	$2.1M	2025-12-31	2026-03-27	10-K	26-000024
7	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$78.4M	2025-12-31	2026-03-27	10-K	26-000024
8	operating income	us-gaap:OperatingIncomeLoss	-$12.0M	2025-12-31	2026-03-27	10-K	26-000024
9	book equity	us-gaap:StockholdersEquity	$11.9M	2025-12-31	2026-03-27	10-K	26-000024
10	liabilities	us-gaap:Liabilities	$2.2M	2025-12-31	2026-03-27	10-K	26-000024
11	operating income	us-gaap:OperatingIncomeLoss	-$8.3M	2023-12-31	2025-03-13	10-K	25-000010
12	interest expense	us-gaap:InterestExpense	$305,000	2023-12-31	2024-03-14	10-K	24-011207
13	assets	us-gaap:Assets	$17.3M	2023-12-31	2025-03-13	10-K	25-000010
14	shares outstanding	dei:EntityCommonStockSharesOutstanding	2,540,518	2026-03-26	2026-03-27	10-K	26-000024
15	shares outstanding	dei:EntityCommonStockSharesOutstanding	15,180,945	2025-03-12	2025-03-13	10-K	25-000010

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