Intrusion Inc.

INTZ

Nasdaq; business equipment; SIC 3576, Computer Communications Equipment; CIK 0000736012

C

middle fifth of 496 graded peers in business equipment

rank 257 of 496; percentile 51.7; sampling error 2.2 points; lower is stronger

A B C D E

C, the tortoise



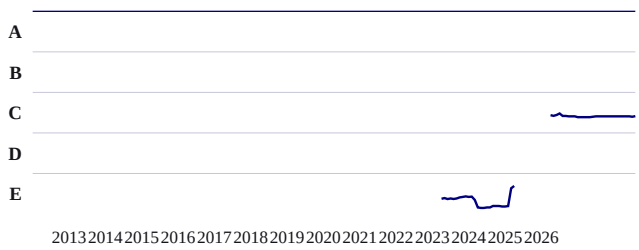
Scoreboard	
Profitability	B/C percentile 41.0
Solvency	B/C percentile 40.4
Growth and financing	D percentile 65.1
Reliability	0.76 AUC filers with under $12.5M assets; 95% interval 0.65 to 0.86; 63 events, 2020 to 2025
Peer failure rate	0.60% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	under $12.5M assets total assets $10.4M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	short runway not computable: distress, fortress balance sheet
Inputs computable	7 of 14
Graded from	filings received through Mar 25, 2026 211 days before the rescan; latest periodic filing 10-Q received Aug 11, 2026
Last close	$0.60 2026-10-21; market equity $14.7M; 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 25, 2026

in September 1983 and reincorporated in Delaware in October 1995. Our principal executive offices are located at 101 East Park Boulevard, Suite 1200, Plano, Texas 75074, and our telephone number is (888) 637-7770. Our website URL is www.intrusion.com. We post the following filings in the "Investors" section of our website as soon as reasonably practicable after they are electronically filed with or furnished to the Securities and Exchange Commission (the "SEC"): our Annual Reports on Form 10-K; our Quarterly Reports on Form 10-Q; our Current Reports on Form 8-K; and any amendments to those reports or statements filed or furnished pursuant to Section 13(a) or 15(d) of the Exchange Act.

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 41.0						
Gross profitability	51.8%	28.6%		15.3	556	2025-12-31
Return on invested capital	not computable	11.2%				

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one or more required annual facts are missing					
Accruals ratio	(21.0%)	(7.3%)	18.4	616	2025-12-31
Gross margin stability, five years	12.0 pts	2.3 pts	89.4	426	2025-12-31
Solvency, sleeve percentile 40.4					
Twelve-month failure probability	not computable	0.05%			
liabilities and a nearby cover-page share count are required at 2026-06-30					
Altman Z double-prime	not computable	2.15			
one or more required annual facts are missing					
Net debt to EBITDA	not computable	1.11x			
one or more required annual facts are missing					
Interest coverage	not computable	3.77x			
latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31					
Current ratio	2.37x	2.01x	40.4	660	2025-12-31
Growth and financing, sleeve percentile 65.1					
Revenue growth, three-year compound	(2.3%)	6.4%	72.5	536	2025-12-31
Free cash flow growth, three-year compound	not computable	18.1%			
current FCF must be positive and base FCF must exceed $100,000					
Reinvestment rate	not computable	14.3%			
NOPAT must exceed $100,000					
Asset growth, three years	3.8%	5.0%	51.1	561	2025-12-31
Net share issuance, one year	5.3%	0.5%	71.8	409	2026-03-24

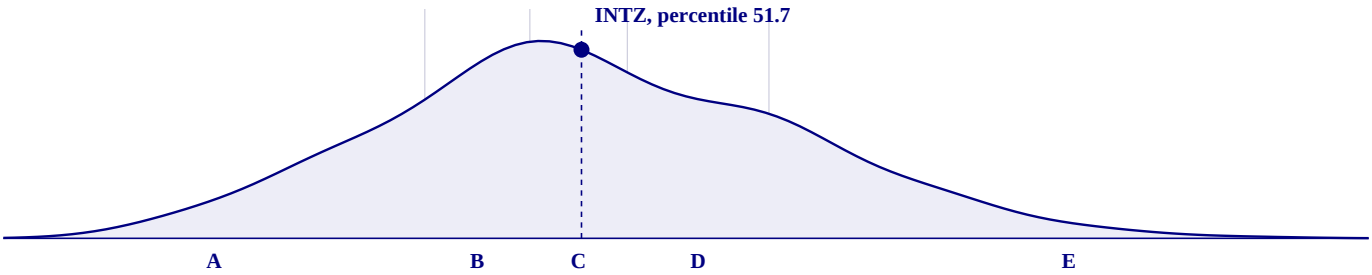
Warnings

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

Check	Measured
Short runway	cash runway is 0.2 months

Among 496 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
252	Blackberry Ltd. (BB)	50.7	C	fortress balance sheet
253	Ultra Clean Holdings, Inc. (UCTT)	50.9	C	
254	Soundthinking, Inc. (SSTI)	51.1	C	
255	Cisco Systems, Inc. (CSCO)	51.3	C	
256	Alarm.com Holdings, Inc. (ALRM)	51.5	C	
257	Intrusion Inc. (INTZ)	51.7	C	short runway
258	Evertec, Inc. (EVTC)	51.9	C	
259	Pioneer Power Solutions, Inc. (PPSI)	52.1	C	late filer, fortress balance sheet
260	Esco Technologies Inc. (ESE)	52.3	C	
261	Sanmina Corp. (SANM)	52.5	C	fortress balance sheet
262	Diodes Inc. (DIOD)	52.7	C	fortress balance sheet

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What the price implies

at the 2026-10-21 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(43.8%)	2.2%	15
Distance from 52-week high	(71.0%)	(30.2%)	12
EBIT to enterprise value	not computable	1.5%	
Free cash flow yield	(54.9%)	2.7%	6
Book value to price	0.30	0.25	56
Sales to price	0.51	0.32	63
Composite equity issuance, five years	333.0%	4.2%	97
Relative strength against the sector, log excess return	(0.86)	(0.26)	15

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	pass
Operating cash flow exceeds net income	pass
Long-term leverage fell	fail
Current ratio improved	pass
No new shares issued	fail
Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$182,000
Operating cash flow, four quarters	-$8.9M
Months of runway	0.2
Days since last periodic filing	72 (10-Q received Aug 11, 2026)
Median daily dollar volume, 63 sessions	$98,437

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	$5.4M	2025-12-31	2026-03-25	10-K	26-002196
2	assets	us-gaap:Assets	$10.4M	2025-12-31	2026-03-25	10-K	26-002196
3	net income	us-gaap:NetIncomeLoss	-$9.1M	2025-12-31	2026-03-25	10-K	26-002196
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$6.8M	2025-12-31	2026-03-25	10-K	26-002196
5	assets	us-gaap:Assets	$11.5M	2024-12-31	2026-03-25	10-K	26-002196
6	revenue	us-gaap:Revenues	$7.0M	2025-12-31	2026-03-25	10-K	26-002196
7	gross profit	us-gaap:GrossProfit	$4.4M	2024-12-31	2026-03-25	10-K	26-002196
8	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$5.8M	2024-12-31	2026-03-25	10-K	26-002196
9	gross profit	us-gaap:GrossProfit	$4.4M	2023-12-31	2025-02-27	10-K	25-001272
10	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$5.6M	2023-12-31	2025-02-27	10-K	25-001272
11	gross profit	us-gaap:GrossProfit	$4.2M	2022-12-31	2024-04-01	10-K	24-002011
12	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$7.5M	2022-12-31	2024-04-01	10-K	24-002011
13	gross profit	us-gaap:GrossProfit	$3.7M	2021-12-31	2023-03-31	10-K	23-002002
14	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$7.3M	2021-12-31	2023-03-31	10-K	23-002002
15	operating income	us-gaap:OperatingIncomeLoss	-$12.0M	2023-12-31	2025-02-27	10-K	25-001272
16	interest expense	us-gaap:InterestExpense	$1.9M	2023-12-31	2024-04-01	10-K	24-002011
17	current assets	us-gaap:AssetsCurrent	$4.2M	2025-12-31	2026-03-25	10-K	26-002196
18	current liabilities	us-gaap:LiabilitiesCurrent	$1.8M	2025-12-31	2026-03-25	10-K	26-002196

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19	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$777,000	2025-12-31	2026-03-25	10-K	26-002196
20	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$6.3M	2024-12-31	2026-03-25	10-K	26-002196
21	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$533,000	2024-12-31	2026-03-25	10-K	26-002196
22	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$7.8M	2023-12-31	2025-02-27	10-K	25-001272
23	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$157,000	2023-12-31	2025-02-27	10-K	25-001272
24	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$13.2M	2022-12-31	2024-04-01	10-K	24-002011
25	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$307,000	2022-12-31	2024-04-01	10-K	24-002011
26	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$1.8M	2025-12-31	2026-03-25	10-K	26-002196
27	operating income	us-gaap:OperatingIncomeLoss	-$9.2M	2025-12-31	2026-03-25	10-K	26-002196
28	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$9.1M	2025-12-31	2026-03-25	10-K	26-002196
29	income tax	us-gaap:IncomeTaxExpenseBenefit	$0	2025-12-31	2026-03-25	10-K	26-002196
30	current assets	us-gaap:AssetsCurrent	$5.5M	2024-12-31	2026-03-25	10-K	26-002196
31	current liabilities	us-gaap:LiabilitiesCurrent	$3.7M	2024-12-31	2026-03-25	10-K	26-002196
32	assets	us-gaap:Assets	$6.2M	2023-12-31	2025-02-27	10-K	25-001272
33	assets	us-gaap:Assets	$9.3M	2022-12-31	2024-04-01	10-K	24-002011
34	shares outstanding	dei:EntityCommonStockSharesOutstanding	20,369,066	2026-03-24	2026-03-25	10-K	26-002196
35	shares outstanding	dei:EntityCommonStockSharesOutstanding	19,342,776	2025-02-27	2025-04-30	10-K/A	25-003003

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