Loop Industries, Inc.

LOOP

Nasdaq; chemicals; SIC 2800, Chemicals & Allied Products; CIK 0001504678

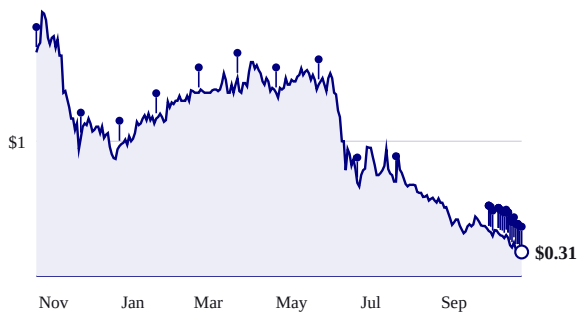
None

No letter

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

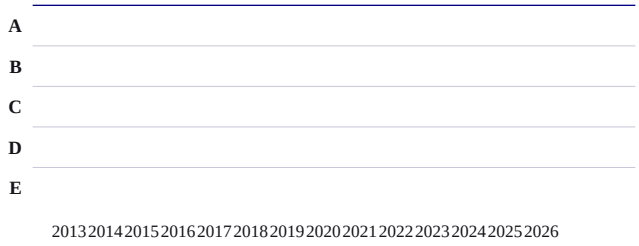
Scoreboard	
Reliability	0.76 AUC filers with under $12.5M assets; 95% interval 0.65 to 0.86; 63 events, 2020 to 2025
Peer failure rate	0.60% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	under $12.5M assets total assets $8.6M
Standard universe	outside revenue above $1M and assets above $10M
Warnings	short runway, thin data not computable: distress
Inputs computable	6 of 14
Graded from	filings received through May 27, 2026 148 days before the rescan; latest periodic filing 10-Q received Oct 16, 2026
Last close	$0.32 2026-10-20; market equity $15.5M; 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 May 27, 2026

Loop Industries is a technology company whose mission is to accelerate the world's shift toward sustainable PET plastic and polyester fiber and away from our dependence on fossil fuels. Loop Industries owns patented and proprietary technology that depolymerizes no and low-value waste PET plastic and polyester fiber, including plastic bottles, packaging, and textiles such as carpets and clothing, into its base building block monomers, DMT and MEG. The monomers are separated, purified and polymerized to create virgin-quality Loop? branded PET resin suitable for use in food-grade packaging and polyester fiber, thus enabling our customers to meet their sustainability objectives.

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 53.1						
Gross profitability	1.6%	21.3%		93.3	359	2026-02-28
Return on invested capital	not computable	9.5%				

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required facts have no common fiscal period end						
Accruals ratio	(16.1%)	(4.2%)	12.8	399	2026-02-28	
Gross margin stability, five years	not computable	2.2 pts				
five annual gross margins are required; found 1						
Solvency, sleeve percentile 79.6						
Twelve-month failure probability	not computable	0.04%				
latest liabilities, cash plus short-term investments, book equity, and shares are required						
Altman Z double-prime	not computable	3.41				
required facts have no common fiscal period end						
Net debt to EBITDA	not computable	1.88x				
required facts have no common fiscal period end						
Interest coverage	not computable	4.16x				
required facts have no common fiscal period end						
Current ratio	1.31x	2.20x	79.6	422	2026-02-28	
Growth and financing, sleeve percentile 60.4						
Revenue growth, three-year compound	43.8%	1.3%	2.9	350	2026-02-28	
Free cash flow growth, three-year compound	not computable	12.6%				
current FCF must be positive and base FCF must exceed $100,000						
Reinvestment rate	not computable	24.3%				
required facts have no common fiscal period end						
Asset growth, three years	(40.5%)	2.9%	99.5	368	2026-02-28	
Net share issuance, one year	1.4%	0.0%	79.0	320	2026-05-26	

Warnings

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

Check	Measured
Short runway	cash runway is 1.5 months
Thin data	6 of 14 grade factors are computable; minimum is 7

What the price implies

at the 2026-10-20 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(67.4%)	13.8%	2
Distance from 52-week high	(82.6%)	(23.8%)	2
EBIT to enterprise value	(23.6%)	3.9%	6
Free cash flow yield	(13.8%)	3.2%	11
Book value to price	(0.92)	0.38	1
Sales to price	0.03	0.55	3
Composite equity issuance, five years	14.0%	(9.9%)	79
Relative strength against the sector, log excess return	(1.29)	(0.02)	2

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score None of 9, period end 2026-02-28	
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	fail
No new shares issued	fail

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Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$836,000
Operating cash flow, four quarters	-$6.9M
Months of runway	1.5
Days since last periodic filing	6 (10-Q received Oct 16, 2026)
Median daily dollar volume, 63 sessions	$53,904

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	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$514,000	2026-02-28	2026-05-27	10-K	26-018576
2	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$381,000	2026-02-28	2026-05-27	10-K	26-018576
3	assets	us-gaap:Assets	$8.6M	2026-02-28	2026-05-27	10-K	26-018576
4	net income	us-gaap:NetIncomeLoss	-$12.3M	2026-02-28	2026-05-27	10-K	26-018576
5	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$10.1M	2026-02-28	2026-05-27	10-K	26-018576
6	assets	us-gaap:Assets	$18.6M	2025-02-28	2026-05-27	10-K	26-018576
7	current assets	us-gaap:AssetsCurrent	$3.6M	2026-02-28	2026-05-27	10-K	26-018576
8	current liabilities	us-gaap:LiabilitiesCurrent	$2.8M	2026-02-28	2026-05-27	10-K	26-018576
9	revenue	us-gaap:Revenues	$10.9M	2025-02-28	2025-05-30	10-K/A	25-006337
10	revenue	us-gaap:Revenues	$153,000	2024-02-29	2025-05-30	10-K/A	25-006337
11	revenue	us-gaap:Revenues	$173,000	2023-02-28	2024-05-29	10-K	24-007029
12	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$2.1M	2025-02-28	2026-05-27	10-K	26-018576
13	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$0	2025-02-28	2025-05-30	10-K/A	25-006337
14	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$18.0M	2024-02-29	2025-05-30	10-K/A	25-006337
15	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$5.2M	2024-02-29	2025-05-30	10-K/A	25-006337
16	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$34.9M	2023-02-28	2024-05-29	10-K	24-007029
17	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$81,000	2023-02-28	2024-05-29	10-K	24-007029
18	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$40.6M	2022-02-28	2023-05-18	10-K	23-006894
19	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$4.8M	2022-02-28	2023-05-18	10-K	23-006894
20	assets	us-gaap:Assets	$20.6M	2024-02-29	2025-05-30	10-K/A	25-006337
21	assets	us-gaap:Assets	$40.6M	2023-02-28	2024-05-29	10-K	24-007029
22	shares outstanding	dei:EntityCommonStockSharesOutstanding	48,380,371	2026-05-26	2026-05-27	10-K	26-018576
23	shares outstanding	dei:EntityCommonStockSharesOutstanding	47,718,350	2025-05-28	2025-05-30	10-K/A	25-006337

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