Microbot Medical Inc.

MBOT

Nasdaq; healthcare; SIC 3841, Surgical & Medical Instruments & Apparatus; CIK 0000883975

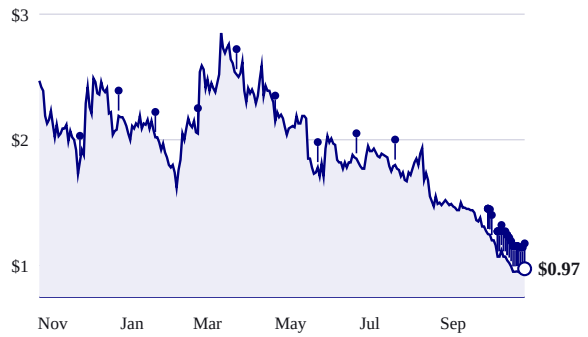
None

No letter

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

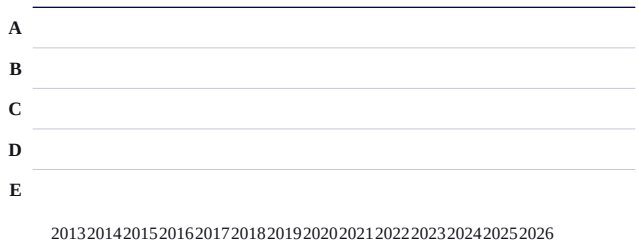
Scoreboard	
Reliability	0.83 AUC filers with $12.5M to $120M assets; 95% interval 0.79 to 0.86; 201 events, 2020 to 2025
Peer failure rate	1.07% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$12.5M to $120M assets total assets $81.5M
Standard universe	outside revenue above $1M and assets above $10M
Warnings	dilution, short runway, thin data not computable: fortress balance sheet
Inputs computable	6 of 14
Graded from	filings received through Mar 26, 2026 212 days before the rescan; latest periodic filing 10-Q received Aug 11, 2026
Last close	$0.97 2026-10-23; market equity $65.3M; 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 26, 2026

is a medical device company specializing in the research, design and development of next generation robotic endoluminal surgery devices targeting the minimally invasive surgery space. We are primarily focused on leveraging our robotic technologies with the goal of redefining surgical robotics while improving surgical outcomes for patients. our LIBERTY® technological platform, we have developed the first-ever fully disposable robot for various endovascular interventional procedures. The LIBERTY® Endovascular Robotic Surgical System is designed to maneuver guidewires and over-the-wire devices (such as microcatheters) within the body's vasculature.

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 80.6						
Gross profitability	not computable	32.3%				

latest aligned inputs end 2013-12-31; latest annual assets end 2025-12-31

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Return on invested capital	not computable	9.3%				
one or more required annual facts are missing						
Accruals ratio	(0.2%)	(6.6%)		80.6	809	2025-12-31
Gross margin stability, five years	not computable	2.8 pts				
five annual gross margins are required; found 3						
Solvency, sleeve percentile 7.5						
Twelve-month failure probability	0.03%	0.07%		17.1	247	2026-06-30
Altman Z double-prime	21.18	(0.33)		2.5	754	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 2017-12-31; latest annual assets end 2025-12-31						
Current ratio	23.33x	2.94x		3.0	836	2025-12-31
Growth and financing, sleeve percentile 42.0						
Revenue growth, three-year compound	not computable	10.1%				
four consecutive annual observations are required						
Free cash flow growth, three-year compound	not computable	10.9%				
current FCF must be positive and base FCF must exceed $100,000						
Reinvestment rate	not computable	37.1%				
required facts have no common fiscal period end						
Asset growth, three years	104.5%	2.1%		2.0	702	2025-12-31
Net share issuance, one year	93.3%	2.5%		82.0	634	2026-03-24

Warnings

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

Check	Measured
Dilution	split-adjusted year-over-year share growth is 93.3%
Short runway	cash runway is 2.1 months
Thin data	6 of 14 grade factors are computable; minimum is 7

What the price implies

at the 2026-10-23 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(51.1%)	7.7%	14
Distance from 52-week high	(65.8%)	(31.4%)	16
EBIT to enterprise value	not computable	(1.5%)	
Free cash flow yield	(20.0%)	(1.0%)	23
Book value to price	1.05	0.28	86
Sales to price	0.00	0.30	3
Composite equity issuance, five years	224.6%	20.5%	92
Relative strength against the sector, log excess return	(0.93)	(0.14)	14

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	$3.2M
Operating cash flow, four quarters	-$17.6M
Months of runway	2.1
Days since last periodic filing	74 (10-Q received Aug 11, 2026)
Median daily dollar volume, 63 sessions	$727,705

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	$886,642	2013-12-31	2014-03-13	10-K	14-097773
2	assets	us-gaap:Assets	$41.6M	2013-12-31	2015-03-13	10-K	15-091382
3	net income	us-gaap:NetIncomeLoss	-$13.1M	2025-12-31	2026-03-26	10-K	26-012935
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$13.0M	2025-12-31	2026-03-26	10-K	26-012935
5	assets	us-gaap:Assets	$81.5M	2025-12-31	2026-03-26	10-K	26-012935
6	assets	us-gaap:Assets	$6.0M	2024-12-31	2026-03-26	10-K	26-012935
7	current assets	us-gaap:AssetsCurrent	$79.8M	2025-12-31	2026-03-26	10-K	26-012935
8	current liabilities	us-gaap:LiabilitiesCurrent	$3.4M	2025-12-31	2026-03-26	10-K	26-012935
9	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$104.1M	2025-12-31	2026-03-26	10-K	26-012935
10	operating income	us-gaap:OperatingIncomeLoss	-$14.7M	2025-12-31	2026-03-26	10-K	26-012935
11	book equity	us-gaap:StockholdersEquity	$77.6M	2025-12-31	2026-03-26	10-K	26-012935
12	liabilities	us-gaap:Liabilities	$4.0M	2025-12-31	2026-03-26	10-K	26-012935
13	operating income	us-gaap:OperatingIncomeLoss	$5.3M	2017-12-31	2019-04-01	10-K	19-004545
14	interest expense	us-gaap:InterestAndDebtExpense	-$2.3M	2017-12-31	2018-04-02	10-K	18-004562
15	revenue	us-gaap:Revenues	$116,887	2015-12-31	2016-03-15	10-K	16-504472
16	revenue	us-gaap:Revenues	$172,297	2013-12-31	2016-03-15	10-K	16-504472
17	revenue	us-gaap:Revenues	$1.4M	2012-12-31	2014-03-13	10-K	14-097773
18	revenue	us-gaap:Revenues	$1.2M	2011-12-31	2014-03-13	10-K	14-097773
19	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$60,000	2025-12-31	2026-03-26	10-K	26-012935
20	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$8.8M	2024-12-31	2026-03-26	10-K	26-012935
21	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$25,000	2024-12-31	2026-03-26	10-K	26-012935
22	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$8.5M	2023-12-31	2025-03-25	10-K	25-000614
23	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$33,000	2023-12-31	2025-03-25	10-K	25-000614
24	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$11.5M	2022-12-31	2024-03-27	10-K	24-011521
25	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$84,000	2022-12-31	2024-03-27	10-K	24-011521
26	assets	us-gaap:Assets	$8.3M	2023-12-31	2025-03-25	10-K	25-000614
27	assets	us-gaap:Assets	$9.5M	2022-12-31	2024-03-27	10-K	24-011521
28	shares outstanding	dei:EntityCommonStockSharesOutstanding	67,158,044	2026-03-24	2026-03-26	10-K	26-012935
29	shares outstanding	dei:EntityCommonStockSharesOutstanding	34,744,476	2025-03-24	2025-03-25	10-K	25-000614

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