Eloxx Pharmaceuticals, Inc.

ELOX

Nasdaq; healthcare; SIC 2836, Biological Products, (No Diagnostic Substances); CIK 0001035354

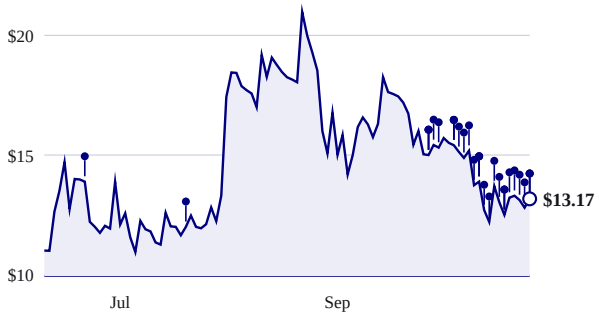
None

No letter

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

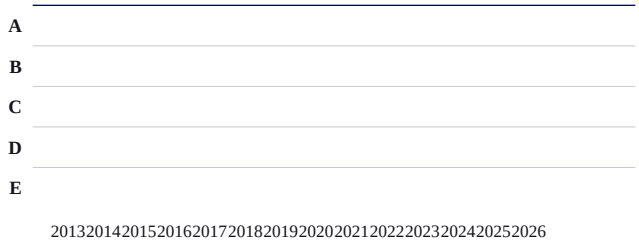
Scoreboard	
Reliability	0.76 AUC filers with under $12.5M assets; 95% interval 0.65 to 0.86; 63 events, 2020 to 2025
Peer failure rate	0.60% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	under $12.5M assets total assets $5.3M
Standard universe	outside revenue above $1M and assets above $10M
Warnings	late filer, thin data, degenerate inputs;... not computable: dilution, short runway, distress
Inputs computable	2 of 14
Graded from	filings received through Mar 17, 2026 224 days before the rescan; latest periodic filing 10-Q received Aug 11, 2026
Last close	$12.88 2026-10-23; market equity $52.0M; 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 17, 2026

-License Agreements-License Agreement between Eloxx and Almirall." The FDA and other regulatory agencies actively enforce the laws and regulations prohibiting the promotion of off-label uses. If any of our product candidates are approved and we are found to have improperly promoted off-label uses of those products, we may become subject to significant liability. The FDA and other regulatory agencies strictly regulate the promotional claims that may be made about prescription products, such as our product candidates, if approved.

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						
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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prior invested-capital observation is 1096 days earlier						
Accruals ratio	not computable	(6.6%)				
prior assets observation is 1096 days earlier						
Gross margin stability, five years	not computable	2.8 pts				
five annual gross margins are required; found 0						
Solvency, sleeve percentile 97.5						
Twelve-month failure probability	not computable	0.07%				
four consecutive discrete net-income quarters are required; found 4						
Altman Z double-prime	(209.70)	(0.33)		98.4	751	2025-12-31
Net debt to EBITDA	not computable	1.82x				
EBITDA must exceed $100,000						
Interest coverage	not computable	(4.51x)				
latest aligned inputs end 2017-12-31; latest annual assets end 2025-12-31						
Current ratio	0.31x	2.94x		96.5	832	2025-12-31
Growth and financing						
Revenue growth, three-year compound	not computable	10.1%				
four annual observations are required; found 3						
Free cash flow growth, three-year compound	not computable	10.9%				
four consecutive annual FCF observations are required; found 11						
Reinvestment rate	not computable	37.1%				
NOPAT must exceed $100,000						
Asset growth, three years	not computable	2.1%				
four consecutive annual observations are required						
Net share issuance, one year	not computable	2.5%				
prior share count is 1081 days earlier						

Warnings

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

Check	Measured
Late filer	found 4 NT 10-K/Q filings in the last eight quarters
Thin data	2 of 14 grade factors are computable; minimum is 7
Degenerate inputs	latest revenue or assets are at or below the $100,000 validity floor
Fortress balance sheet	cash minus debt is 3,785,000 USD; Altman Z is not used

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	not computable	7.7%	
Distance from 52-week high	(37.2%)	(31.2%)	40
EBIT to enterprise value	not computable	(1.5%)	
Free cash flow yield	(60.0%)	(1.0%)	12
Book value to price	0.87	0.28	82
Sales to price	0.00	0.30	0
Composite equity issuance, five years	not computable	20.5%	
Relative strength against the sector, log excess return	not computable	(0.14)	

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

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Return on assets improved	fail
Operating cash flow exceeds net income	fail
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	n/a
Operating cash flow, four quarters	n/a
Months of runway	not finite
Days since last periodic filing	77 (10-Q received Aug 11, 2026)
Median daily dollar volume, 63 sessions	$467,285

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	operating income	us-gaap:OperatingIncomeLoss	-$6.4M	2025-12-31	2026-03-17	10-K	26-108687
2	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$6.0M	2025-12-31	2026-03-17	10-K	26-108687
3	income tax	us-gaap:IncomeTaxExpenseBenefit	$0	2025-12-31	2026-03-17	10-K	26-108687
4	total debt	us-gaap:LongTermDebt	$1.0M	2025-12-31	2026-03-17	10-K	26-108687
5	book equity	us-gaap:StockholdersEquity	-$11.9M	2025-12-31	2026-03-17	10-K	26-108687
6	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$4.8M	2025-12-31	2026-03-17	10-K	26-108687
7	total debt	us-gaap:LongTermDebt	$11.7M	2022-12-31	2023-03-31	10-K	23-011360
8	book equity	us-gaap:StockholdersEquity	-$10.7M	2022-12-31	2026-03-17	10-K	26-108687
9	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$19.2M	2022-12-31	2023-03-31	10-K	23-011360
10	net income	us-gaap:NetIncomeLoss	-$6.0M	2025-12-31	2026-03-17	10-K	26-108687
11	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$6.3M	2025-12-31	2026-03-17	10-K	26-108687
12	assets	us-gaap:Assets	$5.3M	2025-12-31	2026-03-17	10-K	26-108687
13	assets	us-gaap:Assets	$21.1M	2022-12-31	2023-03-31	10-K	23-011360
14	current assets	us-gaap:AssetsCurrent	$5.3M	2025-12-31	2026-03-17	10-K	26-108687
15	current liabilities	us-gaap:LiabilitiesCurrent	$17.2M	2025-12-31	2026-03-17	10-K	26-108687
16	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$300.6M	2025-12-31	2026-03-17	10-K	26-108687
17	liabilities	us-gaap:Liabilities	$17.2M	2025-12-31	2026-03-17	10-K	26-108687
18	depreciation amortization	us-gaap:Depreciation	$0	2025-12-31	2026-03-17	10-K	26-108687
19	operating income	us-gaap:OperatingIncomeLoss	-$20.4M	2017-12-31	2020-03-06	10-K	20-009148
20	interest expense	us-gaap:InterestAndDebtExpense	$824,000	2017-12-31	2018-03-16	10-K	18-086028
21	revenue	us-gaap:Revenues	$0	2025-12-31	2026-03-17	10-K	26-108687
22	revenue	us-gaap:Revenues	$182,229	2014-06-30	2016-10-13	10-K	16-128038
23	revenue	us-gaap:Revenues	$200,000	2012-06-30	2012-10-26	10-K/A	12-057875
24	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$66,000	2022-12-31	2023-03-31	10-K	23-011360
25	depreciation amortization	us-gaap:Depreciation	$77,000	2022-12-31	2023-03-31	10-K	23-011360
26	operating income	us-gaap:OperatingIncomeLoss	-$34.4M	2022-12-31	2023-03-31	10-K	23-011360
27	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$36.1M	2022-12-31	2023-03-31	10-K	23-011360
28	income tax	us-gaap:IncomeTaxExpenseBenefit	$0	2022-12-31	2023-03-31	10-K	23-011360
29	current assets	us-gaap:AssetsCurrent	$20.1M	2022-12-31	2023-03-31	10-K	23-011360
30	current liabilities	us-gaap:LiabilitiesCurrent	$23.1M	2022-12-31	2023-03-31	10-K	23-011360
31	current assets	us-gaap:AssetsCurrent	$43.5M	2021-12-31	2023-03-31	10-K	23-011360
32	current liabilities	us-gaap:LiabilitiesCurrent	$10.0M	2021-12-31	2023-03-31	10-K	23-011360
33	assets	us-gaap:Assets	$45.1M	2021-12-31	2023-03-31	10-K	23-011360
34	assets	us-gaap:Assets	$26.5M	2020-12-31	2022-03-30	10-K	22-012683
35	shares outstanding	dei:EntityCommonStockSharesOutstanding	5,071,935	2026-03-12	2026-03-17	10-K	26-108687
36	shares outstanding	dei:EntityCommonStockSharesOutstanding	2,166,356	2023-03-27	2023-03-31	10-K	23-011360

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