# AMC Robotics Corp.

**AMCI**

Nasdaq; shops; SIC 5700, Retail-Home Furniture, Furnishings & Equipment Stores; CIK 0001937891

# None

### No letter

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

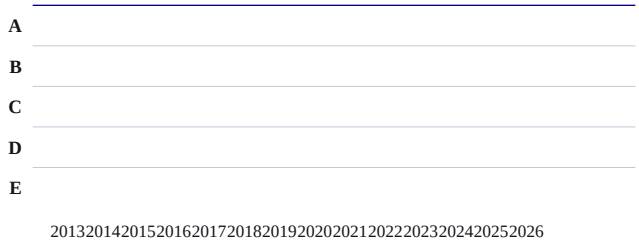
| Scoreboard | |
|---|---|
| **Reliability** | 0.76 AUC<br>filers with under $12.5M assets; 95% interval 0.65 to 0.86; 63 events, 2020 to 2025 |
| **Peer failure rate** | 0.60% a year<br>Item 1.03 bankruptcies, same asset band, 2012 to 2025 |
| **Size band** | under $12.5M assets<br>total assets $11.2M |
| **Standard universe** | inside<br>revenue above $1M and assets above $10M |
| **Warnings** | dilution, late filer, thin data<br>not computable: distress, fortress balance sheet |
| **Inputs computable** | 6 of 14 |
| **Graded from** | filings received through May 5, 2026<br>176 days before the rescan; latest periodic filing 10-Q received Aug 14, 2026 |
| **Last close** | $2.03<br>2026-10-27; market equity $45.9M; 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 Apr 20, 2026*

mission is to make the world a safer place through the use of high-quality, affordable and accessible vision AI technology. The Company currently sells smart hardware products designed for residential and commercial use, including smart cameras, driving recorders, action cameras and Retina K cameras. As of the date of this report, AMC's operations are primarily focused on the sale of hardware products, and it does not currently provide integrated security products or subscription-based services directly to end users.

## 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 36.8** | | | | | | |
| Gross profitability | 25.5% | 42.0% | | 73.2 | 240 | 2025-12-31 |
| Return on invested capital | not computable | 10.9% | | | | |
| *one or more required annual facts are missing* | | | | | | |
| Accruals ratio | (208.0%) | (4.9%) | | 0.4 | 285 | 2025-12-31 |

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| | | | | | | |
|---|---|---|---|---|---|---|
| Gross margin stability, five years | not computable | 1.2 pts | | | | |
| *five annual gross margins are required; found 1* | | | | | | |
| **Solvency, sleeve percentile 1.2** | | | | | | |
| 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 | 12.51 | 1.93 | | 2.0 | 205 | 2025-12-31 |
| Net debt to EBITDA | not computable | 1.84x | | | | |
| *one or more required annual facts are missing* | | | | | | |
| Interest coverage | not computable | 2.28x | | | | |
| *one or more required annual facts are missing* | | | | | | |
| Current ratio | 16.10x | 1.38x | | 0.3 | 293 | 2025-12-31 |
| **Growth and financing, sleeve percentile 98.5** | | | | | | |
| Revenue growth, three-year compound | not computable | 1.6% | | | | |
| *four annual observations are required; found 1* | | | | | | |
| Free cash flow growth, three-year compound | not computable | 4.8% | | | | |
| *four consecutive annual FCF observations are required; found 0* | | | | | | |
| Reinvestment rate | not computable | 8.4% | | | | |
| *one or more required annual facts are missing* | | | | | | |
| Asset growth, three years | (46.1%) | 3.4% | | 98.9 | 270 | 2025-12-31 |
| Net share issuance, one year | 486.2% | (0.6%) | | 98.1 | 208 | 2026-04-20 |

## Warnings

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

| Check | Measured |
|---|---|
| Dilution | split-adjusted year-over-year share growth is 486.2% |
| Late filer | found 6 NT 10-K/Q filings in the last eight quarters |
| Thin data | 6 of 14 grade factors are computable; minimum is 7 |

## What the price implies

*at the 2026-10-27 close; none of these enters the grade*

| Measure | Value | Peer median | Percentile |
|---|---|---|---|
| Twelve-month price change, skipping the latest month | (68.8%) | 0.7% | 3 |
| Distance from 52-week high | (85.9%) | (21.6%) | 3 |
| EBIT to enterprise value | not computable | 5.3% | |
| Free cash flow yield | not computable | 4.1% | |
| Book value to price | 0.22 | 0.34 | 39 |
| Sales to price | 0.13 | 1.65 | 0 |
| Composite equity issuance, five years | not computable | (16.8%) | |
| Relative strength against the sector, log excess return | (1.14) | 0.03 | 3 |

## 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 |
| No new shares issued | fail |
| Gross margin improved | fail |

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| | |
|---|---|
| Asset turnover improved | fail |

**Cash, filings, liquidity**

| | |
|---|---|
| Cash and equivalents | $4.5M |
| Operating cash flow, four quarters | -$7.7M |
| Months of runway | 7.1 |
| Days since last periodic filing | 75 (10-Q received Aug 14, 2026) |
| Median daily dollar volume, 63 sessions | $208,185 |

## 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 | $2.9M | 2025-12-31 | 2026-04-20 | 10-K | 26-018144 |
| 2 | assets | us-gaap:Assets | $11.2M | 2025-12-31 | 2026-04-20 | 10-K | 26-018144 |
| 3 | net income | us-gaap:NetIncomeLoss | -$24.8M | 2025-12-31 | 2026-04-20 | 10-K | 26-018144 |
| 4 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | -$5.6M | 2025-12-31 | 2026-04-20 | 10-K | 26-018144 |
| 5 | assets | us-gaap:Assets | $7.3M | 2024-12-31 | 2026-04-20 | 10-K | 26-018144 |
| 6 | current assets | us-gaap:AssetsCurrent | $11.1M | 2025-12-31 | 2026-04-20 | 10-K | 26-018144 |
| 7 | current liabilities | us-gaap:LiabilitiesCurrent | $686,821 | 2025-12-31 | 2026-04-20 | 10-K | 26-018144 |
| 8 | retained earnings | us-gaap:RetainedEarningsAccumulatedDeficit | -$27.2M | 2025-12-31 | 2026-04-20 | 10-K | 26-018144 |
| 9 | operating income | us-gaap:OperatingIncomeLoss | -$505,166 | 2025-12-31 | 2026-04-20 | 10-K | 26-018144 |
| 10 | book equity | us-gaap:StockholdersEquity | $10.4M | 2025-12-31 | 2026-04-20 | 10-K | 26-018144 |
| 11 | liabilities | us-gaap:Liabilities | $746,384 | 2025-12-31 | 2026-04-20 | 10-K | 26-018144 |
| 12 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $6.0M | 2025-12-31 | 2026-04-20 | 10-K | 26-018144 |
| 13 | assets | us-gaap:Assets | $50.9M | 2023-12-31 | 2025-04-14 | 10-K | 25-004572 |
| 14 | assets | us-gaap:Assets | $71.2M | 2022-12-31 | 2024-04-16 | 10-K | 24-014881 |
| 15 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 22,595,363 | 2026-04-20 | 2026-05-05 | 10-K/A | 26-021292 |
| 16 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 3,854,856 | 2025-04-14 | 2025-04-14 | 10-K | 25-004572 |

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