Quanome Technologies, Inc.

QNME

Nasdaq; other; SIC 4731, Arrangement of Transportation of Freight & Cargo; CIK 0001996192

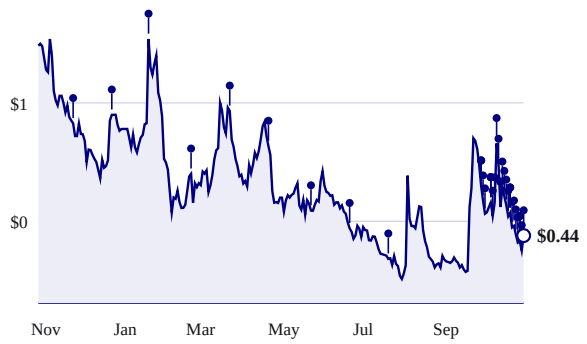
None

No letter

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

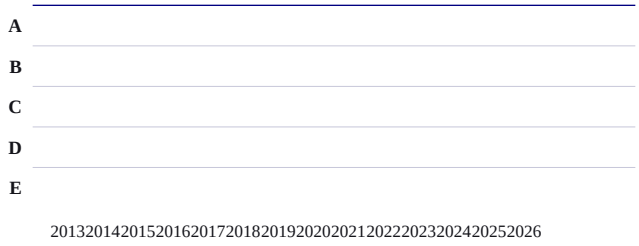
Scoreboard	
Reliability	0.76 AUC filers with under $12.5M assets; 95% interval 0.65 to 0.86; 63 events, 2020 to 2025
Peer failure rate	0.60% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	under $12.5M assets total assets $11.7M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	dilution, short runway, late filer, thin... not computable: distress
Inputs computable	5 of 14
Graded from	filings received through Sep 25, 2026 34 days before the rescan; latest periodic filing 10-K received Sep 25, 2026
Last close	$0.42 2026-10-28; market equity $14.5M; 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 Sep 25, 2026

Our business currently consists of three principal areas of focus: (i) our established, revenue-generating pharmaceutical distribution operations through Hupan Pharmaceutical; (ii) our recently initiated strategic focus on quantum-related and certain other advanced technology activities, which remains in the development and evaluation stage and has not generated revenue as of the date of this report; and (iii) our recently initiated efforts to provide dedicated AI compute capacity and managed inference services, which remain in the preliminary stage and have not resulted in executed customer contracts or generated revenue as of the date of this report.

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 23.4						
Gross profitability	28.4%	27.0%		43.4	287	2026-06-30
Return on invested capital	not computable	10.0%				
pretax income must exceed the validity floor and imply a 0%-100% tax rate						

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Accruals ratio	(48.4%)	(5.8%)		3.4	503	2026-06-30
Gross margin stability, five years	not computable	2.2 pts				
five annual gross margins are required; found 3						
Solvency, sleeve percentile 51.4						
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	(4.76)	2.05		82.0	385	2026-06-30
Net debt to EBITDA	not computable	2.52x				
EBITDA must exceed $100,000						
Interest coverage	not computable	2.45x				
latest aligned inputs end 2025-06-30; latest annual assets end 2026-06-30						
Current ratio	2.46x	1.33x		20.8	507	2026-06-30
Growth and financing, sleeve percentile 95.7						
Revenue growth, three-year compound	not computable	5.1%				
four annual observations are required; found 3						
Free cash flow growth, three-year compound	not computable	8.8%				
four consecutive annual FCF observations are required; found 2						
Reinvestment rate	not computable	11.6%				
pretax income must exceed the validity floor and imply a 0%-100% tax rate						
Asset growth, three years	not computable	4.2%				
four annual observations are required; found 3						
Net share issuance, one year	97.5%	(0.5%)		95.7	353	2026-09-22

Warnings

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

Check	Measured
Dilution	split-adjusted year-over-year share growth is 97.5%
Short runway	cash runway is 2.5 months
Late filer	found 4 NT 10-K/Q filings in the last eight quarters
Thin data	5 of 14 grade factors are computable; minimum is 7
Fortress balance sheet	cash minus debt is 3,454,362 USD; Altman Z is not used

What the price implies

at the 2026-10-28 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(73.8%)	2.0%	4
Distance from 52-week high	(65.4%)	(26.4%)	9
EBIT to enterprise value	(60.3%)	4.3%	3
Free cash flow yield	(21.1%)	4.2%	9
Book value to price	0.46	0.34	63
Sales to price	0.39	0.71	36
Composite equity issuance, five years	not computable	(8.9%)	
Relative strength against the sector, log excess return	(1.49)	(0.13)	4

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score None of 9, period end 2026-06-30	
Return on assets above zero	fail
Operating cash flow above zero	fail
Return on assets improved	fail
Operating cash flow exceeds net income	pass

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Long-term leverage fell	fail
Current ratio improved	pass
No new shares issued	fail
Gross margin improved	pass
Asset turnover improved	fail

Cash, filings, liquidity

Cash and equivalents	$670,281
Operating cash flow, four quarters	-$3.2M
Months of runway	2.5
Days since last periodic filing	34 (10-K received Sep 25, 2026)
Median daily dollar volume, 63 sessions	$220,745

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	$3.3M	2026-06-30	2026-09-25	10-K	26-103571
2	assets	us-gaap:Assets	$11.7M	2026-06-30	2026-09-25	10-K	26-103571
3	operating income	us-gaap:OperatingIncomeLoss	-$1.5M	2025-06-30	2026-09-25	10-K	26-103571
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$1.7M	2025-06-30	2026-09-25	10-K	26-103571
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$212,296	2025-06-30	2026-09-25	10-K	26-103571
6	total debt	us-gaap:LongTermDebt	$1.4M	2025-06-30	2025-10-14	10-K	25-098720
7	book equity	us-gaap:StockholdersEquity	$2.8M	2025-06-30	2026-09-25	10-K	26-103571
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$4.8M	2025-06-30	2026-09-25	10-K	26-103571
9	total debt	us-gaap:LongTermDebt	$883,337	2024-06-30	2024-09-30	10-K	24-083350
10	book equity	us-gaap:StockholdersEquity	$639,792	2024-06-30	2026-09-25	10-K	26-103571
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$123,550	2024-06-30	2025-10-14	10-K	25-098720
12	net income	us-gaap:NetIncomeLoss	-$9.5M	2026-06-30	2026-09-25	10-K	26-103571
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesC...	-$3.2M	2026-06-30	2026-09-25	10-K	26-103571
14	assets	us-gaap:Assets	$14.4M	2025-06-30	2026-09-25	10-K	26-103571
15	current assets	us-gaap:AssetsCurrent	$11.0M	2026-06-30	2026-09-25	10-K	26-103571
16	current liabilities	us-gaap:LiabilitiesCurrent	$4.5M	2026-06-30	2026-09-25	10-K	26-103571
17	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$14.8M	2026-06-30	2026-09-25	10-K	26-103571
18	operating income	us-gaap:OperatingIncomeLoss	-$10.2M	2026-06-30	2026-09-25	10-K	26-103571
19	book equity	us-gaap:StockholdersEquity	$7.0M	2026-06-30	2026-09-25	10-K	26-103571
20	liabilities	us-gaap:Liabilities	$4.6M	2026-06-30	2026-09-25	10-K	26-103571
21	depreciation amortization	us-gaap:Depreciation	$15,809	2025-06-30	2026-09-25	10-K	26-103571
22	interest expense	us-gaap:InterestExpense	$138,994	2025-06-30	2025-10-14	10-K	25-098720
23	revenue	us-gaap:Revenues	$5.9M	2026-06-30	2026-09-25	10-K	26-103571
24	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$17.8M	2025-06-30	2025-10-14	10-K	25-098720
25	revenue	us-gaap:Revenues	$18.3M	2024-06-30	2024-09-30	10-K	24-083350
26	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$2,048	2026-06-30	2026-09-25	10-K	26-103571
27	depreciation amortization	us-gaap:Depreciation	$52,012	2026-06-30	2026-09-25	10-K	26-103571
28	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$10.0M	2026-06-30	2026-09-25	10-K	26-103571
29	income tax	us-gaap:IncomeTaxExpenseBenefit	$91,711	2026-06-30	2026-09-25	10-K	26-103571
30	current assets	us-gaap:AssetsCurrent	$10.3M	2025-06-30	2026-09-25	10-K	26-103571
31	current liabilities	us-gaap:LiabilitiesCurrent	$9.7M	2025-06-30	2026-09-25	10-K	26-103571
32	assets	us-gaap:Assets	$9.2M	2024-06-30	2025-10-14	10-K	25-098720
33	shares outstanding	dei:EntityCommonStockSharesOutstanding	34,427,559	2026-09-22	2026-09-25	10-K	26-103571
34	shares outstanding	dei:EntityCommonStockSharesOutstanding	17,427,559	2025-10-10	2025-10-14	10-K	25-098720

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