Stereotaxis, Inc.

STXS

NYSE; healthcare; SIC 3845, Electromedical & Electrotherapeutic Apparatus; CIK 0001289340

D/E

on the D/E boundary of 370 graded peers in healthcare

rank 304 of 370; percentile 82.1; sampling error 2.5 points; lower is stronger



D/E, the sloth



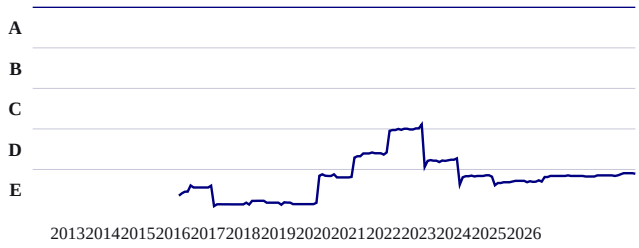
Scoreboard	
Profitability	C percentile 48.8
Solvency	D/E percentile 78.5
Growth and financing	C percentile 56.2
Reliability	0.83 AUC filers with $12.5M to $120M assets; 95% interval 0.79 to 0.86; 201 events, 2020 to 2025
Peer failure rate	1.07% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$12.5M to $120M assets total assets $52.3M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered
Inputs computable	9 of 14
Graded from	filings received through Apr 3, 2026 209 days before the rescan; latest periodic filing 10-Q received Aug 12, 2026
Last close	$0.97 2026-10-28; market equity $97.5M; 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 Mar 12, 2026

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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 48.8						
Gross profitability	32.7%	32.3%		45.1	369	2025-12-31
Return on invested capital	not computable	9.3%				

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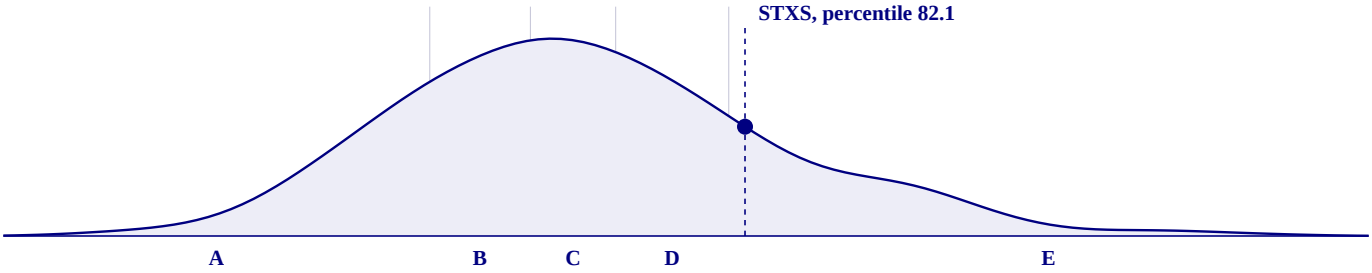
one or more required annual facts are missing					
Accruals ratio	(16.1%)	(6.6%)	27.1	805	2025-12-31
Gross margin stability, five years	5.9 pts	2.8 pts	74.3	242	2025-12-31
Solvency, sleeve percentile 78.5					
Twelve-month failure probability	0.20%	0.07%	69.4	246	2026-06-30
Altman Z double-prime	(37.38)	(0.33)	85.3	751	2025-12-31
Net debt to EBITDA	not computable	1.82x			
EBITDA must exceed $100,000					
Interest coverage	not computable	(4.51x)			
interest expense must exceed $100,000					
Current ratio	1.51x	2.94x	80.9	832	2025-12-31
Growth and financing, sleeve percentile 56.2					
Revenue growth, three-year compound	4.8%	10.1%	61.2	413	2025-12-31
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%			
one or more required annual facts are missing					
Asset growth, three years	(0.7%)	2.1%	52.9	697	2025-12-31
Net share issuance, one year	13.1%	2.5%	54.6	633	2026-02-28

Among 370 peers

healthcare; letters are fifths of this list



Composite score of every graded peer, smoothed; vertical rules are the letter band edges; stronger to the left.

Rank	Company	Percentile	Letter	Warnings
299	Merck & Co., Inc. (MRK)	80.8	D/E	
300	Surgery Partners, Inc. (SGRY)	81.0	D/E	late filer
301	Hyperfine, Inc. (HYPR)	81.3	D/E	
302	C4 Therapeutics, Inc. (CCCC)	81.6	D/E	dilution, fortress balance sheet
303	Moderna, Inc. (MRNA)	81.8	D/E	
304	Stereotaxis, Inc. (STXS)	82.1	D/E	
305	Accuray Inc. (ARAY)	82.4	D/E	late filer
306	Karyopharm Therapeutics Inc. (KPTI)	82.7	E	dilution, distress, fortress balance sheet
307	SkinHealth Systems Inc. (SKIN)	82.9	E	
308	Pyxis Oncology, Inc. (PYXS)	83.2	E	short runway, distress
309	Opko Health, Inc. (OPK)	83.5	E	fortress balance sheet

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	(53.7%)	7.7%	12
Distance from 52-week high	(67.3%)	(27.7%)	14
EBIT to enterprise value	(21.0%)	(1.5%)	23

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Free cash flow yield	(14.2%)	(1.0%)	27
Book value to price	0.13	0.27	32
Sales to price	0.33	0.31	53
Composite equity issuance, five years	30.6%	20.5%	58
Relative strength against the sector, log excess return	(0.98)	(0.14)	12

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	pass
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
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$10.5M
Operating cash flow, four quarters	-$15.3M
Months of runway	8.2
Days since last periodic filing	78 (10-Q received Aug 12, 2026)
Median daily dollar volume, 63 sessions	$673,418

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	$17.1M	2025-12-31	2026-03-12	10-K	26-009881
2	assets	us-gaap:Assets	$52.3M	2025-12-31	2026-03-12	10-K	26-009881
3	net income	us-gaap:NetIncomeLoss	-$21.6M	2025-12-31	2026-03-12	10-K	26-009881
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$13.7M	2025-12-31	2026-03-12	10-K	26-009881
5	assets	us-gaap:Assets	$46.7M	2024-12-31	2026-03-12	10-K	26-009881
6	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$32.4M	2025-12-31	2026-03-12	10-K	26-009881
7	gross profit	us-gaap:GrossProfit	$14.6M	2024-12-31	2026-03-12	10-K	26-009881
8	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$26.9M	2024-12-31	2026-03-12	10-K	26-009881
9	gross profit	us-gaap:GrossProfit	$14.9M	2023-12-31	2025-03-14	10-K	25-010352
10	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$26.8M	2023-12-31	2025-03-14	10-K	25-010352
11	gross profit	us-gaap:GrossProfit	$18.5M	2022-12-31	2024-03-08	10-K	24-009371
12	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$28.1M	2022-12-31	2024-03-08	10-K	24-009371
13	gross profit	us-gaap:GrossProfit	$23.2M	2021-12-31	2023-03-09	10-K	23-007106
14	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$35.0M	2021-12-31	2023-03-09	10-K	23-007106
15	current assets	us-gaap:AssetsCurrent	$33.8M	2025-12-31	2026-03-12	10-K	26-009881
16	current liabilities	us-gaap:LiabilitiesCurrent	$22.4M	2025-12-31	2026-03-12	10-K	26-009881
17	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$583.4M	2025-12-31	2026-03-12	10-K	26-009881
18	operating income	us-gaap:OperatingIncomeLoss	-$22.1M	2025-12-31	2026-03-12	10-K	26-009881
19	book equity	us-gaap:StockholdersEquity	$13.5M	2025-12-31	2026-03-12	10-K	26-009881
20	liabilities	us-gaap:Liabilities	$33.5M	2025-12-31	2026-03-12	10-K	26-009881
21	total debt	us-gaap:LongTermDebt	$18.4M	2015-12-31	2016-03-11	10-K	16-501650
22	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$5.6M	2015-12-31	2018-03-20	10-K	18-089265
23	operating income	us-gaap:OperatingIncomeLoss	-$5.4M	2015-12-31	2017-03-16	10-K	17-085191
24	depreciation amortization	us-gaap:Depreciation	$320,301	2015-12-31	2017-03-16	10-K	17-085191
25	operating income	us-gaap:OperatingIncomeLoss	-$2.5M	2018-12-31	2020-03-16	10-K	20-004012

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26	interest expense	us-gaap:InterestExpense	$16,566	2018-12-31	2019-03-15	10-K	19-003425
27	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$93,000	2025-12-31	2026-03-12	10-K	26-009881
28	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$8.5M	2024-12-31	2026-03-12	10-K	26-009881
29	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$34,000	2024-12-31	2026-03-12	10-K	26-009881
30	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$9.1M	2023-12-31	2025-03-14	10-K	25-010352
31	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$366,000	2023-12-31	2025-03-14	10-K	25-010352
32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$8.4M	2022-12-31	2024-03-08	10-K	24-009371
33	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$2.4M	2022-12-31	2024-03-08	10-K	24-009371
34	assets	us-gaap:Assets	$41.9M	2023-12-31	2025-03-14	10-K	25-010352
35	assets	us-gaap:Assets	$53.4M	2022-12-31	2024-03-08	10-K	24-009371
36	shares outstanding	dei:EntityCommonStockSharesOutstanding	97,248,936	2026-02-28	2026-04-03	10-K/A	26-015172
37	shares outstanding	dei:EntityCommonStockSharesOutstanding	85,979,662	2025-02-28	2025-03-14	10-K	25-010352

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