Amesite Inc.

AMST

Nasdaq; business equipment; SIC 7372, Services-Prepackaged Software; CIK 0001807166

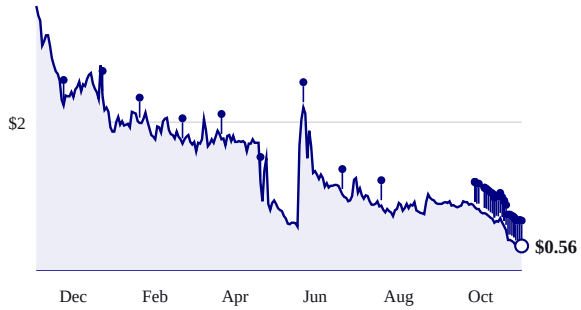
None

No letter

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

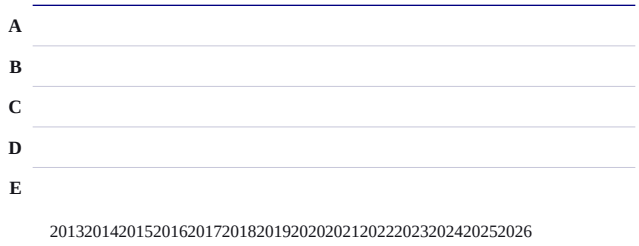
Scoreboard	
Reliability	0.76 AUC filers with under $12.5M assets; 95% interval 0.65 to 0.86; 63 events, 2020 to 2025
Peer failure rate	0.60% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	under $12.5M assets total assets $3.0M
Standard universe	outside revenue above $1M and assets above $10M
Warnings	dilution, late filer, thin data not computable: distress, fortress balance sheet
Inputs computable	5 of 14
Graded from	filings received through Sep 23, 2026 40 days before the rescan; latest periodic filing 10-K received Sep 23, 2026
Last close	$0.56 2026-10-27; market equity $3.7M; 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 23, 2026

and commercializing AI (artificial intelligence)-powered solutions for the enterprise and for professionals, with particular emphasis on the post-acute healthcare market. In fiscal 2026, we launched a census-based Enterprise tier with EMR (electronic medical records) compatibility, automated interdisciplinary team reporting, and configurable documentation; introduced the AI-native NurseMagic? EMR capability; and secured our largest enterprise deployment to date, serving an approximately 2,700-patient census. We operate through two product lines: NurseMagic? and LynkMagic?.

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 12.7						
Gross profitability	not computable	28.7%				
one or more required annual facts are missing						
Return on invested capital	not computable	11.4%				

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one or more required annual facts are missing					
Accruals ratio	(31.0%)	(7.3%)	12.7	617	2026-06-30
Gross margin stability, five years	not computable	2.3 pts			
five annual gross margins are required; found 0					
Solvency, sleeve percentile 12.1					
Twelve-month failure probability	not computable	0.05%			
liabilities and a nearby cover-page share count are required at 2026-06-30					
Altman Z double-prime	not computable	2.15			
one or more required annual facts are missing					
Net debt to EBITDA	not computable	1.09x			
one or more required annual facts are missing					
Interest coverage	not computable	3.77x			
one or more required annual facts are missing					
Current ratio	6.42x	2.01x	12.1	661	2026-06-30
Growth and financing, sleeve percentile 93.1					
Revenue growth, three-year compound	(24.4%)	6.4%	94.9	534	2026-06-30
Free cash flow growth, three-year compound	not computable	18.1%			
four consecutive annual FCF observations are required; found 5					
Reinvestment rate	not computable	13.5%			
one or more required annual facts are missing					
Asset growth, three years	(21.9%)	5.1%	93.7	559	2026-06-30
Net share issuance, one year	43.2%	0.5%	90.7	408	2026-09-23

Warnings

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

Check	Measured
Dilution	split-adjusted year-over-year share growth is 43.2%
Late filer	found 1 NT 10-K/Q filings in the last eight quarters
Thin data	5 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	(71.6%)	(2.0%)	7
Distance from 52-week high	(84.1%)	(32.4%)	6
EBIT to enterprise value	not computable	1.6%	
Free cash flow yield	(58.6%)	2.8%	6
Book value to price	0.72	0.27	82
Sales to price	0.10	0.31	18
Composite equity issuance, five years	127.4%	4.3%	94
Relative strength against the sector, log excess return	(1.53)	(0.29)	7

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	pass
Operating cash flow exceeds net income	pass
Long-term leverage fell	fail
Current ratio improved	fail

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No new shares issued	fail
Gross margin improved	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$2.3M
Operating cash flow, four quarters	-$2.1M
Months of runway	12.9
Days since last periodic filing	40 (10-K received Sep 23, 2026)
Median daily dollar volume, 63 sessions	$48,952

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	net income	us-gaap:NetIncomeLoss	-$3.1M	2026-06-30	2026-09-23	10-K	26-102676
2	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$2.1M	2026-06-30	2026-09-23	10-K	26-102676
3	assets	us-gaap:Assets	$3.0M	2026-06-30	2026-09-23	10-K	26-102676
4	assets	us-gaap:Assets	$3.1M	2025-06-30	2026-09-23	10-K	26-102676
5	current assets	us-gaap:AssetsCurrent	$2.4M	2026-06-30	2026-09-23	10-K	26-102676
6	current liabilities	us-gaap:LiabilitiesCurrent	$375,918	2026-06-30	2026-09-23	10-K	26-102676
7	revenue	us-gaap:Revenues	$364,777	2026-06-30	2026-09-23	10-K	26-102676
8	revenue	us-gaap:Revenues	$110,459	2025-06-30	2026-09-23	10-K	26-102676
9	revenue	us-gaap:Revenues	$166,881	2024-06-30	2025-09-29	10-K	25-093213
10	revenue	us-gaap:Revenues	$845,009	2023-06-30	2025-01-02	10-K/A	25-000438
11	assets	us-gaap:Assets	$3.3M	2024-06-30	2025-09-29	10-K	25-093213
12	assets	us-gaap:Assets	$6.3M	2023-06-30	2025-01-02	10-K/A	25-000438
13	shares outstanding	dei:EntityCommonStockSharesOutstanding	6,549,851	2026-09-23	2026-09-23	10-K	26-102676
14	shares outstanding	dei:EntityCommonStockSharesOutstanding	4,572,713	2025-10-24	2025-10-28	10-K/A	25-103104

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