Lisata Therapeutics, Inc.

LSTA

Nasdaq; healthcare; SIC 2834, Pharmaceutical Preparations; CIK 0000320017

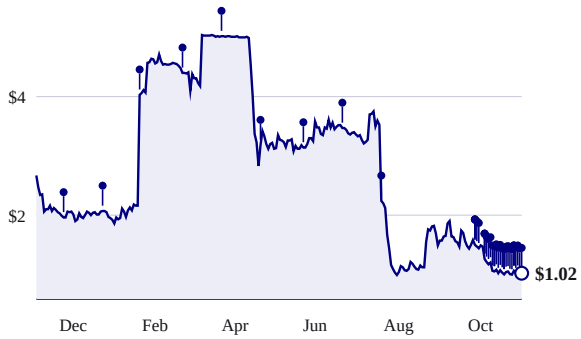
None

No letter

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

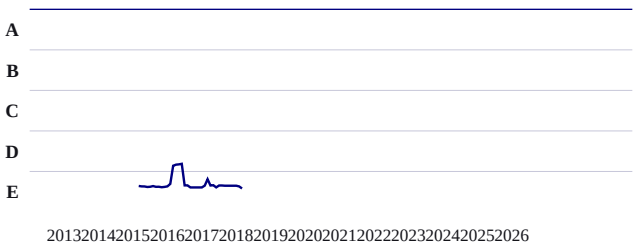
Scoreboard	
Reliability	0.83 AUC filers with $12.5M to $120M assets; 95% interval 0.79 to 0.86; 201 events, 2020 to 2025
Peer failure rate	1.07% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$12.5M to $120M assets total assets $17.7M
Standard universe	outside revenue above $1M and assets above $10M
Warnings	thin data; fortress balance sheet not computable: dilution, distress
Inputs computable	4 of 14
Graded from	filings received through Apr 28, 2026 188 days before the rescan; latest periodic filing 10-Q received Aug 6, 2026
Last close	$1.05 2026-10-30; market equity $9.5M; 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

Lisata Therapeutics, Inc. (together with its subsidiaries, the "Company") is a clinical-stage pharmaceutical company dedicated to the discovery, development, and commercialization of innovative therapies for the treatment of solid tumors and other serious diseases. Our investigational product, certepetide (formerly known as LSTA1 or CEND-1), is designed to activate a novel uptake pathway (the C-end rule active transport mechanism) that allows co-administered or tethered (i.e., molecularly bound) anti-cancer drugs to target and penetrate solid tumors more effectively.

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 74.4						
Gross profitability	not computable	32.4%				
latest aligned inputs end 2016-12-31; latest annual assets end 2025-12-31						
Return on invested capital	not computable	9.3%				

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latest aligned inputs end 2014-12-31; latest annual assets end 2025-12-31					
Accruals ratio	(2.4%)	(6.6%)	74.4	803	2025-12-31
Gross margin stability, five years	not computable	2.8 pts			
latest aligned inputs end 2016-12-31; latest annual assets end 2025-12-31					
Solvency, sleeve percentile 63.4					
Twelve-month failure probability	not computable	0.08%			
latest liabilities, cash plus short-term investments, book equity, and shares are required					
Altman Z double-prime	(100.26)	(0.35)	95.2	748	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	5.76x	2.92x	31.6	829	2025-12-31
Growth and financing, sleeve percentile 96.0					
Revenue growth, three-year compound	not computable	10.1%			
four consecutive annual observations are required					
Free cash flow growth, three-year compound	not computable	10.9%			
four consecutive annual FCF observations are required; found 14					
Reinvestment rate	not computable	37.1%			
NOPAT must exceed $100,000					
Asset growth, three years	(37.6%)	2.2%	96.0	696	2025-12-31
Net share issuance, one year	not computable	2.5%			
prior share count is 42 days earlier					

Warnings

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

Check	Measured
Thin data	4 of 14 grade factors are computable; minimum is 7
Fortress balance sheet	cash minus debt is 19,174,061 USD; Altman Z is not used

What the price implies

at the 2026-10-30 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(48.4%)	(2.2%)	16
Distance from 52-week high	(79.8%)	(28.7%)	9
EBIT to enterprise value	(499.9%)	(1.4%)	2
Free cash flow yield	(173.8%)	(1.0%)	4
Book value to price	0.90	0.28	84
Sales to price	0.02	0.30	8
Composite equity issuance, five years	82.0%	20.5%	74
Relative strength against the sector, log excess return	(0.83)	(0.19)	16

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	fail

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No new shares issued	fail
Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$10.4M
Operating cash flow, four quarters	-$12.3M
Months of runway	10.2
Days since last periodic filing	88 (10-Q received Aug 6, 2026)
Median daily dollar volume, 63 sessions	$110,848

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	revenue	us-gaap:Revenues	$35.3M	2016-12-31	2017-03-17	10-K	17-000008
2	cost of revenue	us-gaap:CostOfRevenue	$31.1M	2016-12-31	2017-03-17	10-K	17-000008
3	assets	us-gaap:Assets	$53.5M	2016-12-31	2018-03-22	10-K	18-000021
4	operating income	us-gaap:OperatingIncomeLoss	-$57.7M	2014-12-31	2016-03-15	10-K	16-000098
5	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$55.6M	2014-12-31	2016-03-15	10-K	16-000098
6	income tax	us-gaap:IncomeTaxExpenseBenefit	-$104,202	2014-12-31	2016-03-15	10-K	16-000098
7	total debt	us-gaap:LongTermDebt	$0	2014-12-31	2015-03-02	10-K	15-000013
8	book equity	us-gaap:StockholdersEquity	$58.5M	2014-12-31	2016-03-15	10-K	16-000098
9	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$19.2M	2014-12-31	2016-03-15	10-K	16-000098
10	total debt	us-gaap:LongTermDebt	$3.0M	2013-12-31	2015-03-02	10-K	15-000013
11	book equity	us-gaap:StockholdersEquity	$62.5M	2013-12-31	2015-03-02	10-K	15-000013
12	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$46.1M	2013-12-31	2015-03-02	10-K	15-000013
13	net income	us-gaap:NetIncomeLoss	-$16.6M	2025-12-31	2026-03-12	10-K	26-000023
14	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$15.9M	2025-12-31	2026-03-12	10-K	26-000023
15	assets	us-gaap:Assets	$17.7M	2025-12-31	2026-03-12	10-K	26-000023
16	assets	us-gaap:Assets	$35.0M	2024-12-31	2026-03-12	10-K	26-000023
17	revenue	us-gaap:Revenues	$22.5M	2015-12-31	2017-03-17	10-K	17-000008
18	cost of revenue	us-gaap:CostOfRevenue	$20.2M	2015-12-31	2017-03-17	10-K	17-000008
19	revenue	us-gaap:Revenues	$17.9M	2014-12-31	2016-03-15	10-K	16-000098
20	cost of revenue	us-gaap:CostOfRevenue	$15.7M	2014-12-31	2016-03-15	10-K	16-000098
21	gross profit	us-gaap:GrossProfit	$1.7M	2013-12-31	2014-03-13	10-K	14-000007
22	revenue	us-gaap:Revenues	$14.7M	2013-12-31	2016-03-15	10-K	16-000098
23	gross profit	us-gaap:GrossProfit	$2.4M	2012-12-31	2014-03-13	10-K	14-000007
24	revenue	us-gaap:Revenues	$14.3M	2012-12-31	2015-03-02	10-K	15-000013
25	current assets	us-gaap:AssetsCurrent	$17.7M	2025-12-31	2026-03-12	10-K	26-000023
26	current liabilities	us-gaap:LiabilitiesCurrent	$3.1M	2025-12-31	2026-03-12	10-K	26-000023
27	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$564.7M	2025-12-31	2026-03-12	10-K	26-000023
28	operating income	us-gaap:OperatingIncomeLoss	-$18.2M	2025-12-31	2026-03-12	10-K	26-000023
29	book equity	us-gaap:StockholdersEquity	$14.9M	2025-12-31	2026-03-12	10-K	26-000023
30	liabilities	us-gaap:Liabilities	$3.1M	2025-12-31	2026-03-12	10-K	26-000023
31	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$1.6M	2014-12-31	2016-03-15	10-K	16-000098
32	operating income	us-gaap:OperatingIncomeLoss	-$20.1M	2019-12-31	2021-02-25	10-K	21-000043
33	interest expense	us-gaap:InterestExpense	$0	2019-12-31	2020-03-05	10-K	20-000016
34	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$170,000	2025-12-31	2026-03-12	10-K	26-000023
35	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.0M	2024-12-31	2026-03-12	10-K	26-000023
36	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$0	2023-12-31	2025-02-27	10-K	25-000011
37	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$28,000	2025-12-31	2026-03-12	10-K	26-000023
38	depreciation amortization	us-gaap:Depreciation	$100,000	2025-12-31	2026-03-12	10-K	26-000023
39	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$17.5M	2025-12-31	2026-03-12	10-K	26-000023
40	income tax	us-gaap:IncomeTaxExpenseBenefit	-$962,000	2025-12-31	2026-03-12	10-K	26-000023
41	current assets	us-gaap:AssetsCurrent	$34.6M	2024-12-31	2026-03-12	10-K	26-000023
42	current liabilities	us-gaap:LiabilitiesCurrent	$5.6M	2024-12-31	2026-03-12	10-K	26-000023
43	assets	us-gaap:Assets	$54.7M	2023-12-31	2025-02-27	10-K	25-000011

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44	assets	us-gaap:Assets	$73.0M	2022-12-31	2024-02-29	10-K	24-000007
45	shares outstanding	dei:EntityCommonStockSharesOutstanding	9,106,391	2026-04-23	2026-04-28	10-K/A	26-000028
46	shares outstanding	dei:EntityCommonStockSharesOutstanding	9,032,291	2026-03-12	2026-03-12	10-K	26-000023