Pluri Inc.

PLUR

Nasdaq; healthcare; SIC 2836, Biological Products, (No Diagnostic Substances); CIK 0001158780

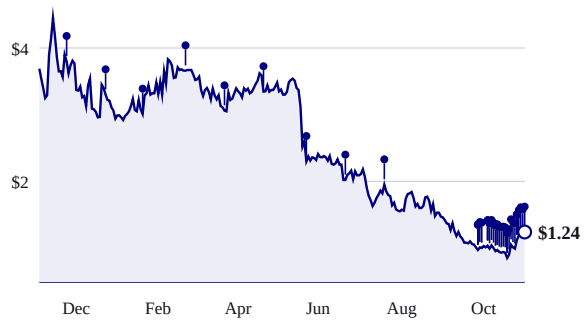
None

No letter

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

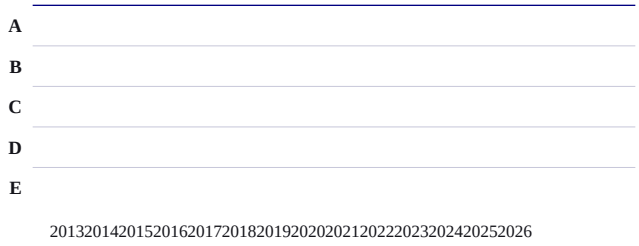
Scoreboard	
Reliability	0.83 AUC filers with $12.5M to $120M assets; 95% interval 0.79 to 0.86; 201 events, 2020 to 2025
Peer failure rate	1.07% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$12.5M to $120M assets total assets $24.9M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	dilution, short runway, thin data; fortr... not computable: distress
Inputs computable	6 of 14
Graded from	filings received through Sep 10, 2026 53 days before the rescan; latest periodic filing 10-K received Sep 10, 2026
Last close	$1.23 2026-10-29; market equity $15.2M; 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 10, 2026

leveraging our proprietary 3D cell expansion platform, which is supported by an in-house, industrial-scale cell manufacturing facility and operates in accordance with Good Manufacturing Practice ("GMP") standards on a self-declared basis. Our platform is designed to enable scalable, cost-efficient and reproducible expansion of human, plant and animal cells and supports cell-based products, services, therapeutics and related technologies across two primary application areas: (i) Human Health and Longevity and (ii) Foodtech and Bio-Farming. on May 11, 2001. Pluri Inc. has a wholly owned subsidiary, Pluri Biotech Ltd.

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 61.1						
Gross profitability	1.8%	32.4%		89.0	366	2026-06-30
Return on invested capital	not computable	9.3%				

required facts have no common fiscal period end

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Accruals ratio	(13.3%)	(6.6%)	33.2	803	2026-06-30
Gross margin stability, five years	not computable	2.8 pts			
five consecutive annual gross margins are required					
Solvency, sleeve percentile 96.7					
Twelve-month failure probability	not computable	0.08%			
liabilities and a nearby cover-page share count are required at 2026-06-30					
Altman Z double-prime	not computable	(0.35)			
one or more required annual facts are missing					
Net debt to EBITDA	not computable	1.82x			
EBITDA must exceed $100,000					
Interest coverage	not computable	(4.51x)			
latest aligned inputs end 2023-06-30; latest annual assets end 2026-06-30					
Current ratio	0.27x	2.92x	96.7	829	2026-06-30
Growth and financing, sleeve percentile 58.1					
Revenue growth, three-year compound	52.4%	10.1%	13.1	412	2026-06-30
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%			
NOPAT must exceed $100,000					
Asset growth, three years	(21.2%)	2.2%	85.3	696	2026-06-30
Net share issuance, one year	51.4%	2.5%	75.7	631	2026-09-09

Warnings

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

Check	Measured
Dilution	split-adjusted year-over-year share growth is 51.4%
Short runway	cash runway is 2.2 months
Thin data	6 of 14 grade factors are computable; minimum is 7
Fortress balance sheet	cash minus debt is 7,009,000 USD; Altman Z is not used

What the price implies

at the 2026-10-29 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(74.4%)	(2.2%)	7
Distance from 52-week high	(72.1%)	(28.7%)	12
EBIT to enterprise value	(191.3%)	(1.4%)	4
Free cash flow yield	(132.1%)	(1.0%)	6
Book value to price	(1.50)	0.28	1
Sales to price	0.07	0.30	19
Composite equity issuance, five years	112.7%	20.5%	81
Relative strength against the sector, log excess return	(1.53)	(0.19)	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	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	$3.5M
Operating cash flow, four quarters	-$19.6M
Months of runway	2.2
Days since last periodic filing	53 (10-K received Sep 10, 2026)
Median daily dollar volume, 63 sessions	$19,184

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	$453,000	2026-06-30	2026-09-10	10-K	26-098862
2	assets	us-gaap:Assets	$24.9M	2026-06-30	2026-09-10	10-K	26-098862
3	net income	us-gaap:NetIncomeLoss	-$23.8M	2026-06-30	2026-09-10	10-K	26-098862
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$19.6M	2026-06-30	2026-09-10	10-K	26-098862
5	assets	us-gaap:Assets	$38.7M	2025-06-30	2026-09-10	10-K	26-098862
6	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$1.3M	2020-06-30	2020-09-10	10-K	20-026105
7	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$8.3M	2020-06-30	2021-09-13	10-K	21-047664
8	operating income	us-gaap:OperatingIncomeLoss	-$29.5M	2020-06-30	2021-09-13	10-K	21-047664
9	depreciation amortization	us-gaap:Depreciation	$1.6M	2020-06-30	2021-09-13	10-K	21-047664
10	operating income	us-gaap:OperatingIncomeLoss	-$27.2M	2023-06-30	2024-09-18	10-K	24-079861
11	interest expense	us-gaap:InterestExpense	$843,000	2023-06-30	2023-09-12	10-K	23-076079
12	current assets	us-gaap:AssetsCurrent	$8.7M	2026-06-30	2026-09-10	10-K	26-098862
13	current liabilities	us-gaap:LiabilitiesCurrent	$32.7M	2026-06-30	2026-09-10	10-K	26-098862
14	revenue	us-gaap:Revenues	$1.0M	2026-06-30	2026-09-10	10-K	26-098862
15	revenue	us-gaap:Revenues	$1.3M	2025-06-30	2026-09-10	10-K	26-098862
16	revenue	us-gaap:Revenues	$326,000	2024-06-30	2025-09-17	10-K	25-088578
17	revenue	us-gaap:Revenues	$287,000	2023-06-30	2024-09-18	10-K	24-079861
18	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$633,000	2026-06-30	2026-09-10	10-K	26-098862
19	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$18.2M	2025-06-30	2026-09-10	10-K	26-098862
20	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$1.6M	2025-06-30	2026-09-10	10-K	26-098862
21	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$18.0M	2024-06-30	2025-09-17	10-K	25-088578
22	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$323,000	2024-06-30	2025-09-17	10-K	25-088578
23	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$22.9M	2023-06-30	2024-09-18	10-K	24-079861
24	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$262,000	2023-06-30	2024-09-18	10-K	24-079861
25	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$511,000	2026-06-30	2026-09-10	10-K	26-098862
26	operating income	us-gaap:OperatingIncomeLoss	-$24.9M	2026-06-30	2026-09-10	10-K	26-098862
27	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$25.4M	2026-06-30	2026-09-10	10-K	26-098862
28	income tax	us-gaap:IncomeTaxExpenseBenefit	-$25,000	2026-06-30	2026-09-10	10-K	26-098862
29	current assets	us-gaap:AssetsCurrent	$22.1M	2025-06-30	2026-09-10	10-K	26-098862
30	current liabilities	us-gaap:LiabilitiesCurrent	$32.3M	2025-06-30	2026-09-10	10-K	26-098862
31	assets	us-gaap:Assets	$39.5M	2024-06-30	2025-09-17	10-K	25-088578
32	assets	us-gaap:Assets	$50.8M	2023-06-30	2024-09-18	10-K	24-079861
33	shares outstanding	dei:EntityCommonStockSharesOutstanding	12,344,736	2026-09-09	2026-09-10	10-K	26-098862
34	shares outstanding	dei:EntityCommonStockSharesOutstanding	8,155,948	2025-09-16	2025-09-17	10-K	25-088578

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