Stoke Therapeutics, Inc.

STOK

Nasdaq; healthcare; SIC 2834, Pharmaceutical Preparations; CIK 0001623526

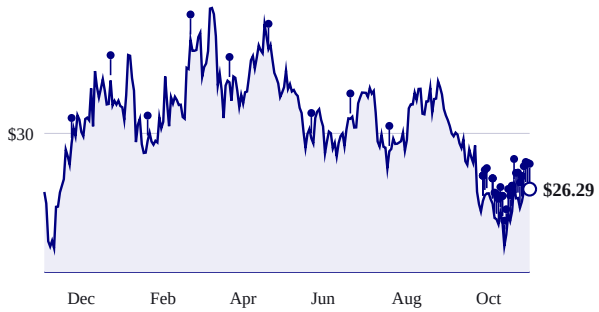
None

No letter

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

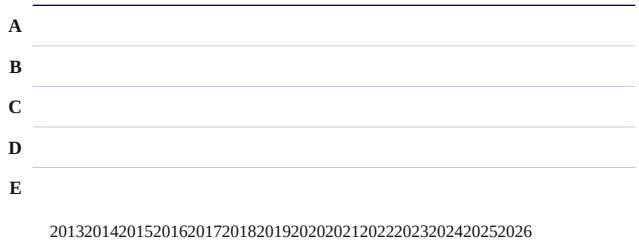
Scoreboard	
Reliability	0.87 AUC filers with $120M to $591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025
Peer failure rate	1.03% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$120M to $591M assets total assets $418.4M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	thin data not computable: distress, fortress balance sheet
Inputs computable	6 of 14
Graded from	filings received through Mar 16, 2026 231 days before the rescan; latest periodic filing 10-Q received Aug 3, 2026
Last close	$26.22 2026-10-30; market equity $1.7B; 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 16, 2026

We are a late-stage clinical company dedicated to addressing the underlying causes of severe diseases by upregulating protein expression with RNA-based medicines. Using our proprietary TANGO (Targeted Augmentation of Nuclear Gene Output) approach, we are developing antisense oligonucleotides ("ASOs") to selectively restore protein levels. Our first investigational, new medicine in development, zorevunersen (STK-001), is a potential disease modifying medicine that is in late-stage clinical testing for the treatment of Dravet syndrome, a severe and progressive genetic epilepsy.

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 29.3						
Gross profitability	not computable	32.4%				
one or more required annual facts are missing						
Return on invested capital	not computable	9.3%				

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one or more required annual facts are missing						
Accruals ratio	(15.2%)	(6.6%)	29.3	803	2025-12-31	
Gross margin stability, five years	not computable	2.8 pts				
five annual gross margins are required; found 0						
Solvency, sleeve percentile 25.6						
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	5.29	(0.35)	17.4	748	2025-12-31	
Net debt to EBITDA	not computable	1.82x				
one or more required annual facts are missing						
Interest coverage	not computable	(4.51x)				
interest expense must exceed $100,000						
Current ratio	5.28x	2.92x	33.8	829	2025-12-31	
Growth and financing, sleeve percentile 25.6						
Revenue growth, three-year compound	145.9%	10.1%	2.9	412	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	17.8%	2.2%	23.5	696	2025-12-31	
Net share issuance, one year	9.4%	2.5%	50.3	631	2026-02-28	

Warnings

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

Check	Measured
Thin data	6 of 14 grade factors are computable; minimum is 7

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	(13.4%)	(2.2%)	42
Distance from 52-week high	(31.4%)	(28.7%)	46
EBIT to enterprise value	not computable	(1.4%)	
Free cash flow yield	2.6%	(1.0%)	69
Book value to price	0.20	0.28	41
Sales to price	0.11	0.30	28
Composite equity issuance, five years	56.5%	20.5%	66
Relative strength against the sector, log excess return	(0.31)	(0.19)	42

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	pass
Return on assets improved	pass
Operating cash flow exceeds net income	pass
Long-term leverage fell	fail
Current ratio improved	fail
No new shares issued	fail
Gross margin improved	fail
Asset turnover improved	pass

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Cash, filings, liquidity	
Cash and equivalents	$110.0M
Operating cash flow, four quarters	-$178.0M
Months of runway	7.4
Days since last periodic filing	91 (10-Q received Aug 3, 2026)
Median daily dollar volume, 63 sessions	$23.7M

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	-$6.9M	2025-12-31	2026-03-16	10-K	26-108362
2	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$45.6M	2025-12-31	2026-03-16	10-K	26-108362
3	assets	us-gaap:Assets	$418.4M	2025-12-31	2026-03-16	10-K	26-108362
4	assets	us-gaap:Assets	$271.6M	2024-12-31	2026-03-16	10-K	26-108362
5	current assets	us-gaap:AssetsCurrent	$305.7M	2025-12-31	2026-03-16	10-K	26-108362
6	current liabilities	us-gaap:LiabilitiesCurrent	$57.9M	2025-12-31	2026-03-16	10-K	26-108362
7	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$497.7M	2025-12-31	2026-03-16	10-K	26-108362
8	operating income	us-gaap:OperatingIncomeLoss	-$20.6M	2025-12-31	2026-03-16	10-K	26-108362
9	book equity	us-gaap:StockholdersEquity	$352.5M	2025-12-31	2026-03-16	10-K	26-108362
10	liabilities	us-gaap:Liabilities	$66.0M	2025-12-31	2026-03-16	10-K	26-108362
11	interest expense	us-gaap:InterestExpense	$9,000	2025-12-31	2026-03-16	10-K	26-108362
12	revenue	us-gaap:Revenues	$184.4M	2025-12-31	2026-03-16	10-K	26-108362
13	revenue	us-gaap:Revenues	$36.6M	2024-12-31	2026-03-16	10-K	26-108362
14	revenue	us-gaap:Revenues	$8.8M	2023-12-31	2025-03-18	10-K	25-041170
15	revenue	us-gaap:Revenues	$12.4M	2022-12-31	2024-03-25	10-K	24-035912
16	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$670,000	2025-12-31	2026-03-16	10-K	26-108362
17	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$86.9M	2024-12-31	2026-03-16	10-K	26-108362
18	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$203,000	2024-12-31	2026-03-16	10-K	26-108362
19	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$81.1M	2023-12-31	2025-03-18	10-K	25-041170
20	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$1.6M	2023-12-31	2025-03-18	10-K	25-041170
21	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$31.9M	2022-12-31	2024-03-25	10-K	24-035912
22	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$4.0M	2022-12-31	2024-03-25	10-K	24-035912
23	assets	us-gaap:Assets	$228.3M	2023-12-31	2025-03-18	10-K	25-041170
24	assets	us-gaap:Assets	$256.1M	2022-12-31	2024-03-25	10-K	24-035912
25	shares outstanding	dei:EntityCommonStockSharesOutstanding	59,150,790	2026-02-28	2026-03-16	10-K	26-108362
26	shares outstanding	dei:EntityCommonStockSharesOutstanding	54,077,739	2025-02-28	2025-03-18	10-K	25-041170

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