Revolution Medicines, Inc.

RVMDW

Nasdaq; healthcare; SIC 2836, Biological Products, (No Diagnostic Substances); CIK 0001628171

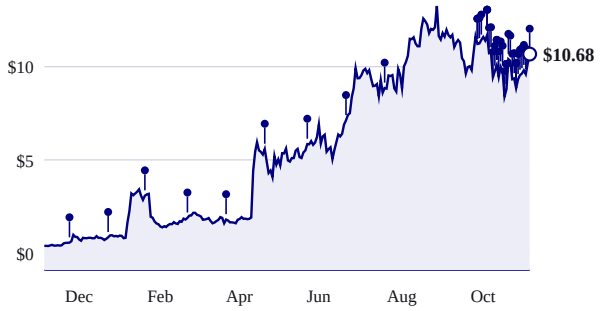
None

No letter

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

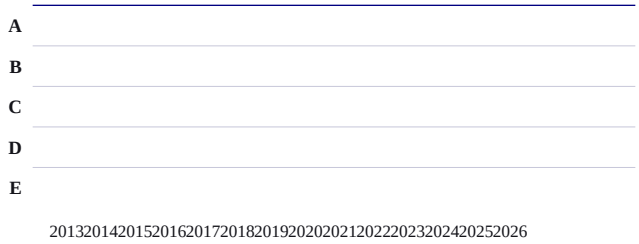
Scoreboard	
Reliability	0.91 AUC filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025
Peer failure rate	1.01% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$591M to $2.67B assets total assets $2.4B
Standard universe	outside revenue above $1M and assets above $10M
Warnings	short runway, thin data, degenerate in... not computable: dilution, distress, fortress balance sheet
Inputs computable	4 of 14
Graded from	filings received through Feb 25, 2026 253 days before the rescan; latest periodic filing 10-Q received Nov 4, 2026
Last close	$10.22 2026-10-21; market equity $0; 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 Feb 25, 2026

We are a clinical-stage precision oncology company developing novel targeted therapies for RAS-addicted cancers. We possess sophisticated structure-based drug discovery capabilities built upon deep chemical biology and cancer pharmacology know-how and innovative, proprietary technologies that enable the creation of small molecules tailored to unconventional binding sites. Guided by our understanding of genetic drivers and adaptive resistance mechanisms in cancer, we deploy precision medicine approaches to inform innovative monotherapy and combination regimens.

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 42.9						
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	(9.5%)	(6.6%)		42.9	801	2025-12-31
Gross margin stability, five years	not computable	2.8 pts				
five annual gross margins are required; found 0						
Solvency, sleeve percentile 30.8						
Twelve-month failure probability	not computable	0.08%				
firm-wide XBRL shares cannot be assigned to one ticker class						
Altman Z double-prime	(0.01)	(0.35)		36.4	746	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	7.14x	2.92x		25.2	827	2025-12-31
Growth and financing, sleeve percentile 9.6						
Revenue growth, three-year compound	not computable	10.1%				
current value must be positive and the base must exceed $100,000						
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	42.6%	2.2%		9.6	696	2025-12-31
Net share issuance, one year	not computable	2.5%				
firm-wide XBRL shares cannot be assigned to one ticker class						

Warnings

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

Check	Measured
Short runway	cash runway is 5.2 months
Thin data	4 of 14 grade factors are computable; minimum is 7
Degenerate inputs	latest revenue or assets are at or below the $100,000 validity floor

What the price implies

at the 2026-10-21 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	3,168.6%	(2.2%)	100
Distance from 52-week high	(19.5%)	(26.8%)	58
EBIT to enterprise value	not computable	(1.4%)	
Free cash flow yield	not computable	(0.9%)	
Book value to price	not computable	0.27	
Sales to price	not computable	0.28	
Composite equity issuance, five years	not computable	20.5%	
Relative strength against the sector, log excess return	3.32	(0.19)	100

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

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Current ratio improved	fail
No new shares issued	fail
Gross margin improved	fail
Asset turnover improved	fail

Cash, filings, liquidity

Cash and equivalents	$615.9M
Operating cash flow, four quarters	-$1.4B
Months of runway	5.2
Days since last periodic filing	1 (10-Q received Nov 4, 2026)
Median daily dollar volume, 63 sessions	$205,842

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	-$1.1B	2025-12-31	2026-02-25	10-K	26-071563
2	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$897.7M	2025-12-31	2026-02-25	10-K	26-071563
3	assets	us-gaap:Assets	$2.4B	2025-12-31	2026-02-25	10-K	26-071563
4	assets	us-gaap:Assets	$2.6B	2024-12-31	2026-02-25	10-K	26-071563
5	current assets	us-gaap:AssetsCurrent	$2.1B	2025-12-31	2026-02-25	10-K	26-071563
6	current liabilities	us-gaap:LiabilitiesCurrent	$290.4M	2025-12-31	2026-02-25	10-K	26-071563
7	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$2.9B	2025-12-31	2026-02-25	10-K	26-071563
8	operating income	us-gaap:OperatingIncomeLoss	-$1.2B	2025-12-31	2026-02-25	10-K	26-071563
9	book equity	us-gaap:StockholdersEquity	$1.6B	2025-12-31	2026-02-25	10-K	26-071563
10	liabilities	us-gaap:Liabilities	$723.2M	2025-12-31	2026-02-25	10-K	26-071563
11	operating income	us-gaap:OperatingIncomeLoss	-$258.3M	2022-12-31	2025-02-26	10-K	25-027736
12	interest expense	us-gaap:InterestExpense	$0	2022-12-31	2023-02-27	10-K	23-004645
13	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$0	2025-12-31	2026-02-25	10-K	26-071563
14	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$0	2024-12-31	2026-02-25	10-K	26-071563
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$11.6M	2023-12-31	2026-02-25	10-K	26-071563
16	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$35.4M	2022-12-31	2025-02-26	10-K	25-027736
17	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$16.0M	2025-12-31	2026-02-25	10-K	26-071563
18	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$557.4M	2024-12-31	2026-02-25	10-K	26-071563
19	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$10.3M	2024-12-31	2026-02-25	10-K	26-071563
20	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$350.6M	2023-12-31	2026-02-25	10-K	26-071563
21	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$7.7M	2023-12-31	2026-02-25	10-K	26-071563
22	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$224.4M	2022-12-31	2025-02-26	10-K	25-027736
23	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$10.8M	2022-12-31	2025-02-26	10-K	25-027736
24	depreciation amortization	us-gaap:Depreciation	$7.4M	2025-12-31	2026-02-25	10-K	26-071563
25	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$1.1B	2025-12-31	2026-02-25	10-K	26-071563
26	income tax	us-gaap:IncomeTaxExpenseBenefit	$0	2025-12-31	2026-02-25	10-K	26-071563
27	current assets	us-gaap:AssetsCurrent	$2.3B	2024-12-31	2026-02-25	10-K	26-071563
28	current liabilities	us-gaap:LiabilitiesCurrent	$163.9M	2024-12-31	2026-02-25	10-K	26-071563
29	assets	us-gaap:Assets	$2.1B	2023-12-31	2025-02-26	10-K	25-027736
30	assets	us-gaap:Assets	$811.9M	2022-12-31	2024-02-26	10-K	24-020145

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