Context Therapeutics Inc.

CNTX

Nasdaq; healthcare; SIC 2834, Pharmaceutical Preparations; CIK 0001842952

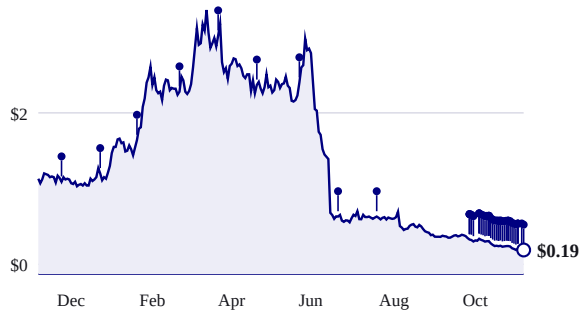
None

No letter

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

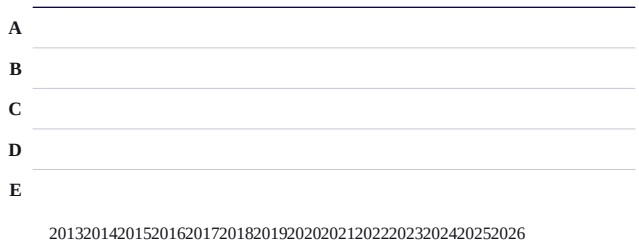
Scoreboard	
Reliability	0.83 AUC filers with $12.5M to $120M assets; 95% interval 0.79 to 0.86; 201 events, 2020 to 2025
Peer failure rate	1.07% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$12.5M to $120M assets total assets $68.5M
Warnings	thin data not computable: degenerate inputs, distress, fortress balance sheet
Inputs computable	5 of 14
Graded from	filings received through Mar 23, 2026 228 days before the rescan; latest periodic filing 10-Q received Aug 5, 2026
Last close	$0.19 2026-11-05; market equity $17.3M; 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 23, 2026

We are a clinical-stage biopharmaceutical company advancing T cell engaging ("TCE") bispecific antibodies ("bsAb") for solid tumors. Our goal is to build an innovative portfolio of TCE bispecific therapeutics, including CTIM-76, a Claudin 6 ("CLDN6") x CD3 TCE, CT-95, a Mesothelin ("MSLN") x CD3 TCE, and CT-202, a Nectin cell adhesion protein 4 ("Nectin-4") x CD3 TCE. CTIM-76 is a CLDN6 x CD3 TCE that is intended to redirect T-cell-mediated lysis toward malignant cells expressing CLDN6. CLDN6 is a tight junction membrane protein target expressed in multiple solid tumors and absent from or expressed at low levels in healthy adult tissues. IND-enabling studies on CTIM-76 have been completed.

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 36.8						
Gross profitability	not computable	32.3%				
one or more required annual facts are missing						

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Return on invested capital	not computable	9.3%				
one or more required annual facts are missing						
Accruals ratio	(11.7%)	(6.6%)		36.8	802	2025-12-31
Gross margin stability, five years	not computable	2.8 pts				
five annual gross margins are required; found 0						
Solvency, sleeve percentile 21.9						
Twelve-month failure probability	not computable	0.07%				
latest liabilities, cash plus short-term investments, book equity, and shares are required						
Altman Z double-prime	3.57	(0.37)		23.1	747	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	8.52x	2.94x		20.7	828	2025-12-31
Growth and financing, sleeve percentile 27.0						
Revenue growth, three-year compound	not computable	10.0%				
four annual observations are required; found 0						
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	21.7%	2.2%		19.9	696	2025-12-31
Net share issuance, one year	2.4%	2.5%		34.2	630	2026-03-19

Warnings

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

Check	Measured
Thin data	5 of 14 grade factors are computable; minimum is 7

What the price implies

at the 2026-11-05 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(72.4%)	(2.1%)	7
Distance from 52-week high	(94.4%)	(30.4%)	3
EBIT to enterprise value	not computable	(1.5%)	
Free cash flow yield	(153.0%)	(1.0%)	4
Book value to price	2.21	0.29	95
Sales to price	not computable	0.30	
Composite equity issuance, five years	not computable	21.4%	
Relative strength against the sector, log excess return	(1.46)	(0.19)	7

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	pass
Operating cash flow exceeds net income	pass
Long-term leverage fell	fail
Current ratio improved	fail
No new shares issued	fail

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Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$43.0M
Operating cash flow, four quarters	-$34.0M
Months of runway	15.2
Days since last periodic filing	93 (10-Q received Aug 5, 2026)
Median daily dollar volume, 63 sessions	$374,101

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	-$36.1M	2025-12-31	2026-03-23	10-K	26-020498
2	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$26.4M	2025-12-31	2026-03-23	10-K	26-020498
3	assets	us-gaap:Assets	$68.5M	2025-12-31	2026-03-23	10-K	26-020498
4	assets	us-gaap:Assets	$98.1M	2024-12-31	2026-03-23	10-K	26-020498
5	current assets	us-gaap:AssetsCurrent	$68.4M	2025-12-31	2026-03-23	10-K	26-020498
6	current liabilities	us-gaap:LiabilitiesCurrent	$8.0M	2025-12-31	2026-03-23	10-K	26-020498
7	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$130.9M	2025-12-31	2026-03-23	10-K	26-020498
8	operating income	us-gaap:OperatingIncomeLoss	-$39.7M	2025-12-31	2026-03-23	10-K	26-020498
9	book equity	us-gaap:StockholdersEquity	$60.5M	2025-12-31	2026-03-23	10-K	26-020498
10	liabilities	us-gaap:Liabilities	$8.0M	2025-12-31	2026-03-23	10-K	26-020498
11	operating income	us-gaap:OperatingIncomeLoss	-$10.5M	2021-12-31	2023-03-22	10-K	23-000041
12	interest expense	us-gaap:InterestExpense	$64,240	2021-12-31	2022-03-23	10-K	22-000029
13	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$33,948	2025-12-31	2026-03-23	10-K	26-020498
14	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$14.6M	2024-12-31	2026-03-23	10-K	26-020498
15	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$7,316	2024-12-31	2026-03-23	10-K	26-020498
16	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$21.0M	2023-12-31	2025-03-20	10-K	25-000028
17	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$0	2023-12-31	2025-03-20	10-K	25-000028
18	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$13.5M	2022-12-31	2024-03-21	10-K	24-000011
19	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$36,836	2022-12-31	2024-03-21	10-K	24-000011
20	assets	us-gaap:Assets	$16.1M	2023-12-31	2025-03-20	10-K	25-000028
21	assets	us-gaap:Assets	$38.0M	2022-12-31	2024-03-21	10-K	24-000011
22	shares outstanding	dei:EntityCommonStockSharesOutstanding	91,879,177	2026-03-19	2026-03-23	10-K	26-020498
23	shares outstanding	dei:EntityCommonStockSharesOutstanding	89,704,194	2025-03-18	2025-03-20	10-K	25-000028

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