# Glucotrack, Inc.

**GCTK**

Nasdaq; healthcare; SIC 3841, Surgical & Medical Instruments & Apparatus; CIK 0001506983

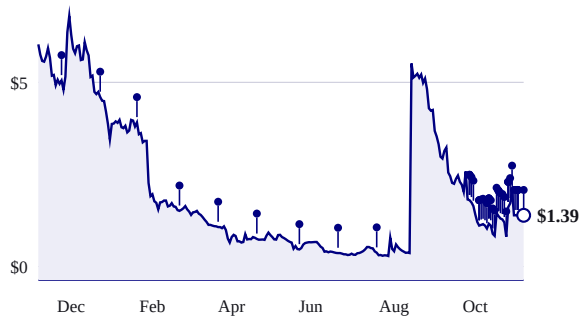
# None

**No letter**

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

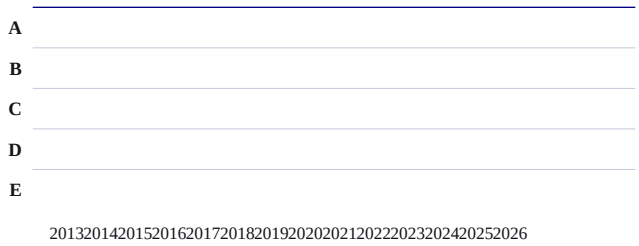
| Scoreboard | |
|---|---|
| **Reliability** | 0.76 AUC<br>filers with under $12.5M assets; 95% interval 0.65 to 0.86; 63 events, 2020 to 2025 |
| **Peer failure rate** | 0.60% a year<br>Item 1.03 bankruptcies, same asset band, 2012 to 2025 |
| **Size band** | under $12.5M assets<br>total assets $7.8M |
| **Standard universe** | outside<br>revenue above $1M and assets above $10M |
| **Warnings** | dilution, short runway, thin data<br>not computable: distress, fortress balance sheet |
| **Inputs computable** | 5 of 14 |
| **Graded from** | filings received through Mar 30, 2026<br>221 days before the rescan; latest periodic filing 10-Q received Aug 14, 2026 |
| **Last close** | $1.36<br>2026-10-29; market equity $959,147; 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 30, 2026*

the context otherwise requires, the terms "we", "our", "ours" "us", "Company" and "Glucotrack" refer to Glucotrack, Inc., a Delaware corporation. Company was incorporated on May 18, 2010 under the laws of the State of Delaware.

## 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 6.7** | | | | | | |
| Gross profitability | not computable | 32.3% | | | | |
| *one or more required annual facts are missing* | | | | | | |
| Return on invested capital | not computable | 9.3% | | | | |
| *one or more required annual facts are missing* | | | | | | |
| Accruals ratio | (60.2%) | (6.6%) | | 6.7 | 802 | 2025-12-31 |
| Gross margin stability, five years | not computable | 2.8 pts | | | | |

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| | | | | | | |
|---|---|---|---|---|---|---|
| *five annual gross margins are required; found 0* | | | | | | |
| **Solvency, sleeve percentile 85.3** | | | | | | |
| 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 | (73.93) | (0.37) | | 92.8 | 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 | 1.61x | 2.94x | | 77.9 | 828 | 2025-12-31 |
| **Growth and financing, sleeve percentile 50.5** | | | | | | |
| Revenue growth, three-year compound | not computable | 10.0% | | | | |
| *latest aligned inputs end 2019-12-31; latest annual assets end 2025-12-31* | | | | | | |
| 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% | | | | |
| *one or more required annual facts are missing* | | | | | | |
| Asset growth, three years | 47.6% | 2.2% | | 8.3 | 696 | 2025-12-31 |
| Net share issuance, one year | 355.9% | 2.5% | | 92.7 | 630 | 2026-03-30 |

## Warnings

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

| Check | Measured |
|---|---|
| Dilution | split-adjusted year-over-year share growth is 355.9% |
| Short runway | cash runway is 0.8 months |
| Thin data | 5 of 14 grade factors are computable; minimum is 7 |

## 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 | (74.7%) | (2.1%) | 7 |
| Distance from 52-week high | (79.6%) | (30.4%) | 10 |
| EBIT to enterprise value | not computable | (1.5%) | |
| Free cash flow yield | (1,564.4%) | (1.0%) | 1 |
| Book value to price | (1.78) | 0.29 | 1 |
| Sales to price | 0.21 | 0.30 | 40 |
| Composite equity issuance, five years | not computable | 21.4% | |
| Relative strength against the sector, log excess return | (1.54) | (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 |
| Gross margin improved | fail |
| Asset turnover improved | fail |

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| Cash, filings, liquidity | |
|---|---|
| Cash and equivalents | $1.1M |
| Operating cash flow, four quarters | -$16.2M |
| Months of runway | 0.8 |
| Days since last periodic filing | 84 (10-Q received Aug 14, 2026) |
| Median daily dollar volume, 63 sessions | $235,132 |

## 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 | -$19.4M | 2025-12-31 | 2026-03-30 | 10-K | 26-013656 |
| 2 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | -$15.2M | 2025-12-31 | 2026-03-30 | 10-K | 26-013656 |
| 3 | assets | us-gaap:Assets | $7.8M | 2025-12-31 | 2026-03-30 | 10-K | 26-013656 |
| 4 | assets | us-gaap:Assets | $5.9M | 2024-12-31 | 2026-03-30 | 10-K | 26-013656 |
| 5 | current assets | us-gaap:AssetsCurrent | $7.7M | 2025-12-31 | 2026-03-30 | 10-K | 26-013656 |
| 6 | current liabilities | us-gaap:LiabilitiesCurrent | $4.8M | 2025-12-31 | 2026-03-30 | 10-K | 26-013656 |
| 7 | retained earnings | us-gaap:RetainedEarningsAccumulatedDeficit | -$151.8M | 2025-12-31 | 2026-03-30 | 10-K | 26-013656 |
| 8 | operating income | us-gaap:OperatingIncomeLoss | -$16.1M | 2025-12-31 | 2026-03-30 | 10-K | 26-013656 |
| 9 | book equity | us-gaap:StockholdersEquity | $2.8M | 2025-12-31 | 2026-03-30 | 10-K | 26-013656 |
| 10 | liabilities | us-gaap:Liabilities | $5.0M | 2025-12-31 | 2026-03-30 | 10-K | 26-013656 |
| 11 | operating income | us-gaap:OperatingIncomeLoss | -$14.5M | 2024-12-31 | 2026-03-30 | 10-K | 26-013656 |
| 12 | interest expense | us-gaap:InterestExpense | $44,000 | 2024-12-31 | 2025-03-31 | 10-K | 25-001861 |
| 13 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $208,000 | 2019-12-31 | 2021-04-13 | 10-K | 21-008654 |
| 14 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $43,488 | 2018-12-31 | 2020-04-14 | 10-K | 20-006370 |
| 15 | revenue | us-gaap:Revenues | $589,462 | 2017-12-31 | 2018-03-30 | 10-K | 18-001056 |
| 16 | revenue | us-gaap:Revenues | $611,689 | 2016-12-31 | 2018-03-30 | 10-K | 18-001056 |
| 17 | assets | us-gaap:Assets | $4.9M | 2023-12-31 | 2025-03-31 | 10-K | 25-001861 |
| 18 | assets | us-gaap:Assets | $2.4M | 2022-12-31 | 2024-03-28 | 10-K | 24-011765 |
| 19 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 1,944,279 | 2026-03-30 | 2026-03-30 | 10-K | 26-013656 |
| 20 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 25,585,853 | 2025-03-31 | 2025-03-31 | 10-K | 25-001861 |

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