# Ideaya Biosciences, Inc.

**IDYA**

Nasdaq; healthcare; SIC 2834, Pharmaceutical Preparations; CIK 0001676725

**A**

**strongest fifth of 370 graded peers in healthcare**

rank 26 of 370; percentile 6.8; sampling error 2.5 points; lower is stronger

A B C D E

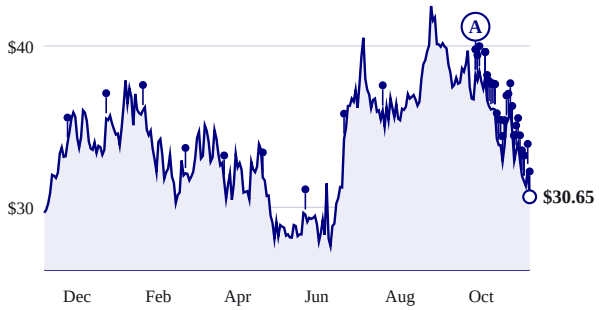
**A, the bull**



## Scoreboard

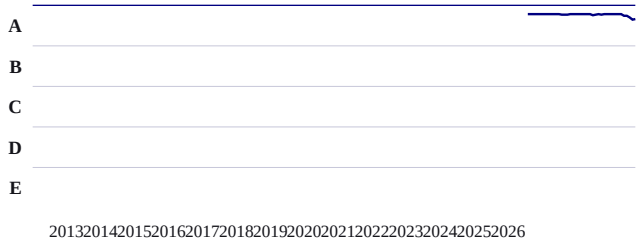
| | |
|---|---|
| **Profitability** | D<br>percentile 67.4 |
| **Solvency** | A<br>percentile 15.0 |
| **Growth and financing** | A<br>percentile 11.8 |
| **Reliability** | 0.91 AUC<br>filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025 |
| **Peer failure rate** | 1.01% a year<br>Item 1.03 bankruptcies, same asset band, 2012 to 2025 |
| **Size band** | $591M to $2.67B assets<br>total assets $1.1B |
| **Standard universe** | inside<br>revenue above $1M and assets above $10M |
| **Warnings** | none triggered<br>not computable: fortress balance sheet |
| **Inputs computable** | 7 of 14 |
| **Graded from** | filings received through Feb 17, 2026<br>262 days before the rescan; latest periodic filing 10-Q received Nov 3, 2026 |
| **Last close** | $30.65<br>2026-11-05; market equity $3.0B; 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 17, 2026*

We are a precision medicine oncology company committed to the discovery, development, and commercialization of transformative therapies for cancer. Our approach integrates expertise in small-molecule drug discovery, structural biology and bioinformatics with robust internal capabilities in identifying and validating translational biomarkers to develop tailored, potentially first-in-class targeted therapies aligned to the genetic drivers of disease. We have built a deep pipeline of product candidates focused on synthetic lethality and antibody-drug conjugates (ADCs) for molecularly defined solid tumor indications.

## The fourteen inputs

*lower percentile is stronger; sleeves and inputs within a sleeve carry equal weight*

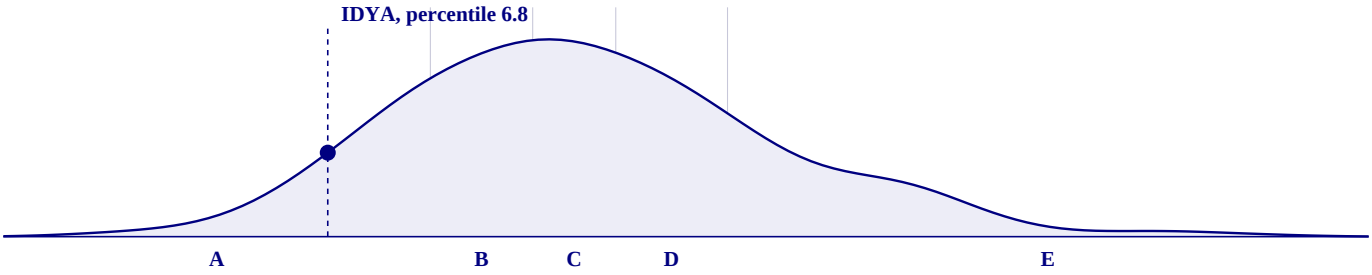
| Input | Value | Peer median | Percentile, 0 to 100 | Pct | Peers | Period end |
|---|---|---|---|---|---|---|
| **Profitability, sleeve percentile 67.4** | | | | | | |
| Gross profitability | not computable | 32.3% | | | | |
| *one or more required annual facts are missing* | | | | | | |
| Return on invested capital | not computable | 9.3% | | | | |

Not investment advice. Informational and educational only. Data from SEC EDGAR, may contain errors, is not warranted. The grade ranks reported financial condition and is not a return forecast.

| | | | | | |
|---|---|---|---|---|---|
| *one or more required annual facts are missing* | | | | | |
| Accruals ratio | (3.8%) | (6.6%) | 67.4 | 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 15.0** | | | | | |
| Twelve-month failure probability | 0.04% | 0.07% | 25.0 | 249 | 2026-09-30 |
| Altman Z double-prime | 12.90 | (0.37) | 6.6 | 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) | | | |
| *one or more required annual facts are missing* | | | | | |
| Current ratio | 11.34x | 2.94x | 13.5 | 828 | 2025-12-31 |
| **Growth and financing, sleeve percentile 11.8** | | | | | |
| Revenue growth, three-year compound | 62.5% | 10.0% | 9.5 | 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 | 41.9% | 2.2% | 9.9 | 696 | 2025-12-31 |
| Net share issuance, one year | 0.3% | 2.5% | 15.9 | 630 | 2026-02-13 |

## Among 370 peers

*healthcare; letters are fifths of this list*




*Composite score of every graded peer, smoothed; vertical rules are the letter band edges; stronger to the left.*

| Rank | Company | Percentile | Letter | Warnings |
|---|---|---|---|---|
| 21 | SBC Medical Group Holdings Inc. (SBCWW) | 5.3 | A | fortress balance sheet |
| 22 | Neurocrine Biosciences Inc. (NBIX) | 5.7 | A | |
| 23 | Crispr Therapeutics AG (CRSP) | 6.0 | A | |
| 24 | United Therapeutics Corp. (UTHR) | 6.2 | A | |
| 25 | AtriCure, Inc. (ATRC) | 6.5 | A | |
| 26 | Ideaya Biosciences, Inc. (IDYA) | 6.8 | A | |
| 27 | iRhythm Holdings, Inc. (IRTC) | 7.0 | A | fortress balance sheet |
| 28 | Hims & Hers Health, Inc. (HIMS) | 7.3 | A | |
| 29 | Veracyte, Inc. (VCYT) | 7.6 | A | |
| 30 | Viridian Therapeutics, Inc.\DE (VRDN) | 7.9 | A | dilution, fortress balance sheet |
| 31 | Alkermes plc. (ALKS) | 8.1 | A | |

## 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 | 20.6% | (2.1%) | 62 |
| Distance from 52-week high | (27.8%) | (30.4%) | 52 |
| EBIT to enterprise value | not computable | (1.5%) | |

Not investment advice. Informational and educational only. Data from SEC EDGAR, may contain errors, is not warranted. The grade ranks reported financial condition and is not a return forecast.

| | | | |
|---|---|---|---|
| Free cash flow yield | (2.5%) | (1.0%) | 46 |
| Book value to price | 0.37 | 0.29 | 59 |
| Sales to price | 0.07 | 0.30 | 21 |
| Composite equity issuance, five years | 109.8% | 21.4% | 79 |
| Relative strength against the sector, log excess return | 0.02 | (0.19) | 62 |

## 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 | pass |
| **Cash, filings, liquidity** | |
| Cash and equivalents | $261.5M |
| Operating cash flow, four quarters | -$347.4M |
| Months of runway | 9.0 |
| Days since last periodic filing | 3 (10-Q received Nov 3, 2026) |
| Median daily dollar volume, 63 sessions | $26.9M |

## 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 | -$113.7M | 2025-12-31 | 2026-02-17 | 10-K | 26-054533 |
| 2 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | -$71.1M | 2025-12-31 | 2026-02-17 | 10-K | 26-054533 |
| 3 | assets | us-gaap:Assets | $1.1B | 2025-12-31 | 2026-02-17 | 10-K | 26-054533 |
| 4 | assets | us-gaap:Assets | $1.1B | 2024-12-31 | 2026-02-17 | 10-K | 26-054533 |
| 5 | current assets | us-gaap:AssetsCurrent | $666.7M | 2025-12-31 | 2026-02-17 | 10-K | 26-054533 |
| 6 | current liabilities | us-gaap:LiabilitiesCurrent | $58.8M | 2025-12-31 | 2026-02-17 | 10-K | 26-054533 |
| 7 | retained earnings | us-gaap:RetainedEarningsAccumulatedDeficit | -$736.5M | 2025-12-31 | 2026-02-17 | 10-K | 26-054533 |
| 8 | operating income | us-gaap:OperatingIncomeLoss | -$159.3M | 2025-12-31 | 2026-02-17 | 10-K | 26-054533 |
| 9 | book equity | us-gaap:StockholdersEquity | $1.0B | 2025-12-31 | 2026-02-17 | 10-K | 26-054533 |
| 10 | liabilities | us-gaap:Liabilities | $86.4M | 2025-12-31 | 2026-02-17 | 10-K | 26-054533 |
| 11 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $218.7M | 2025-12-31 | 2026-02-17 | 10-K | 26-054533 |
| 12 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $7.0M | 2024-12-31 | 2026-02-17 | 10-K | 26-054533 |
| 13 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $23.4M | 2023-12-31 | 2026-02-17 | 10-K | 26-054533 |
| 14 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $50.9M | 2022-12-31 | 2025-02-18 | 10-K | 25-022183 |
| 15 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $2.4M | 2025-12-31 | 2026-02-17 | 10-K | 26-054533 |
| 16 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | -$247.6M | 2024-12-31 | 2026-02-17 | 10-K | 26-054533 |
| 17 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $3.9M | 2024-12-31 | 2026-02-17 | 10-K | 26-054533 |
| 18 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | -$115.2M | 2023-12-31 | 2026-02-17 | 10-K | 26-054533 |
| 19 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $2.4M | 2023-12-31 | 2026-02-17 | 10-K | 26-054533 |
| 20 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | -$87.2M | 2022-12-31 | 2025-02-18 | 10-K | 25-022183 |
| 21 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $3.4M | 2022-12-31 | 2025-02-18 | 10-K | 25-022183 |
| 22 | assets | us-gaap:Assets | $649.3M | 2023-12-31 | 2025-02-18 | 10-K | 25-022183 |
| 23 | assets | us-gaap:Assets | $388.0M | 2022-12-31 | 2024-02-20 | 10-K | 24-017093 |
| 24 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 87,814,027 | 2026-02-13 | 2026-02-17 | 10-K | 26-054533 |
| 25 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 87,537,391 | 2025-02-14 | 2025-02-18 | 10-K | 25-022183 |

Not investment advice. Informational and educational only. Data from SEC EDGAR, may contain errors, is not warranted. The grade ranks reported financial condition and is not a return forecast.