OnKure Therapeutics, Inc.

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Nasdaq; healthcare; SIC 2834, Pharmaceutical Preparations; CIK 0001637715

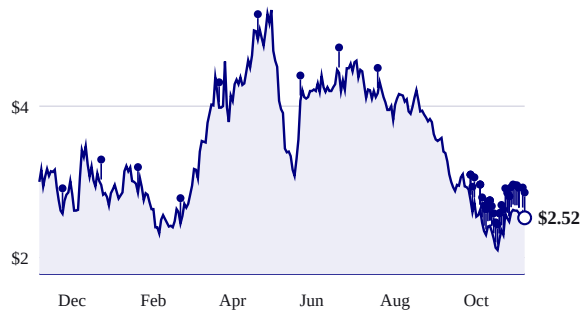
None

No letter

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

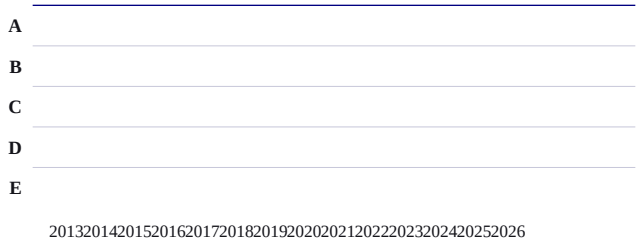
Scoreboard	
Reliability	0.83 AUC filers with $12.5M to $120M assets; 95% interval 0.79 to 0.86; 201 events, 2020 to 2025
Peer failure rate	1.07% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$12.5M to $120M assets total assets $62.1M
Standard universe	outside revenue above $1M and assets above $10M
Warnings	thin data, degenerate inputs not computable: dilution, distress, fortress balance sheet
Inputs computable	4 of 14
Graded from	filings received through Mar 12, 2026 239 days before the rescan; latest periodic filing 10-Q received Nov 4, 2026
Last close	$2.53 2026-11-05; market equity $102.5M; 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 12, 2026

OnKure Therapeutics, Inc. ("OnKure", "we", "us" or the "Company") is a clinical-stage biopharmaceutical company focused on the discovery and development of precision medicines that target biologically validated drivers of cancers and other diseases that are underserved by available therapies. Using a structure-based drug design platform, we are committed to improving clinical outcomes for patients by building a pipeline of small molecule drugs designed to achieve optimal efficacy and tolerability by selectively targeting specific mutations shown to be key drivers of cancer and other diseases.

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 45.2						
Gross profitability	not computable	32.3%				
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	(8.7%)	(6.6%)	45.2	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 31.0						
Twelve-month failure probability	not computable	0.07%				
liabilities and a nearby cover-page share count are required at 2025-12-31						
Altman Z double-prime	(2.31)	(0.37)	46.4	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	10.28x	2.94x	15.6	828	2025-12-31	
Growth and financing, sleeve percentile 79.0						
Revenue growth, three-year compound	not computable	10.0%				
four annual observations are required; found 1						
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	(16.9%)	2.2%	79.0	696	2025-12-31	
Net share issuance, one year	not computable	2.5%				
prior share count is 686 days earlier						

Warnings

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

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

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(19.6%)	(2.1%)	37
Distance from 52-week high	(52.1%)	(30.4%)	29
EBIT to enterprise value	not computable	(1.5%)	
Free cash flow yield	(50.7%)	(1.0%)	15
Book value to price	1.54	0.29	92
Sales to price	0.00	0.30	0
Composite equity issuance, five years	not computable	21.4%	
Relative strength against the sector, log excess return	(0.39)	(0.19)	37

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

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

Cash, filings, liquidity

Cash and equivalents	$151.4M
Operating cash flow, four quarters	-$47.9M
Months of runway	38.0
Days since last periodic filing	2 (10-Q received Nov 4, 2026)
Median daily dollar volume, 63 sessions	$612,699

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	-$59.5M	2025-12-31	2026-03-12	10-K	26-104147
2	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$51.8M	2025-12-31	2026-03-12	10-K	26-104147
3	assets	us-gaap:Assets	$62.1M	2025-12-31	2026-03-12	10-K	26-104147
4	assets	us-gaap:Assets	$114.9M	2024-12-31	2026-03-12	10-K	26-104147
5	current assets	us-gaap:AssetsCurrent	$60.8M	2025-12-31	2026-03-12	10-K	26-104147
6	current liabilities	us-gaap:LiabilitiesCurrent	$5.9M	2025-12-31	2026-03-12	10-K	26-104147
7	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$214.2M	2025-12-31	2026-03-12	10-K	26-104147
8	operating income	us-gaap:OperatingIncomeLoss	-$63.0M	2025-12-31	2026-03-12	10-K	26-104147
9	book equity	us-gaap:StockholdersEquity	$56.2M	2025-12-31	2026-03-12	10-K	26-104147
10	liabilities	us-gaap:Liabilities	$5.9M	2025-12-31	2026-03-12	10-K	26-104147
11	revenue	us-gaap:Revenues	$0	2024-12-31	2025-03-10	10-K	25-036252
12	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$46,000	2025-12-31	2026-03-12	10-K	26-104147
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$51.1M	2024-12-31	2026-03-12	10-K	26-104147
14	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$52,000	2024-12-31	2026-03-12	10-K	26-104147
15	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$34.5M	2023-12-31	2025-03-10	10-K	25-036252
16	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$246,000	2023-12-31	2025-03-10	10-K	25-036252
17	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$47.4M	2022-12-31	2024-03-28	10-K	24-038009
18	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$346,000	2022-12-31	2024-03-28	10-K	24-038009
19	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$417,000	2023-12-31	2025-03-10	10-K	25-036252
20	operating income	us-gaap:OperatingIncomeLoss	-$36.9M	2023-12-31	2025-03-10	10-K	25-036252
21	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$77.4M	2023-12-31	2024-03-28	10-K	24-038009
22	income tax	us-gaap:IncomeTaxExpenseBenefit	$0	2023-12-31	2024-03-28	10-K	24-038009
23	current assets	us-gaap:AssetsCurrent	$33.8M	2023-12-31	2025-03-10	10-K	25-036252
24	current liabilities	us-gaap:LiabilitiesCurrent	$7.3M	2023-12-31	2025-03-10	10-K	25-036252
25	current assets	us-gaap:AssetsCurrent	$106.4M	2022-12-31	2024-03-28	10-K	24-038009
26	current liabilities	us-gaap:LiabilitiesCurrent	$7.1M	2022-12-31	2024-03-28	10-K	24-038009
27	assets	us-gaap:Assets	$35.7M	2023-12-31	2025-03-10	10-K	25-036252
28	assets	us-gaap:Assets	$108.2M	2022-12-31	2024-03-28	10-K	24-038009
29	shares outstanding	dei:EntityCommonStockSharesOutstanding	13,673,565	2026-03-11	2026-03-12	10-K	26-104147
30	shares outstanding	dei:EntityCommonStockSharesOutstanding	33,420,808	2024-04-24	2024-04-26	10-K/A	24-048631

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