Duke Robotics Corp.

DUKRW

Nasdaq; manufacturing; SIC 3721, Aircraft; CIK 0001638911

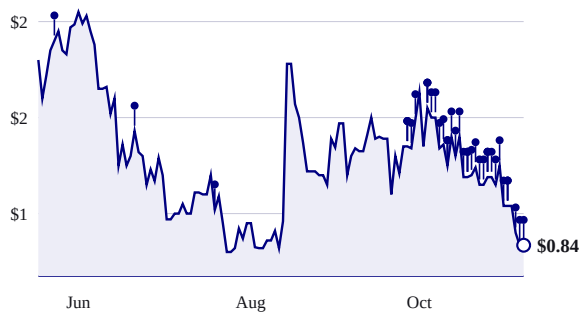
None

No letter

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

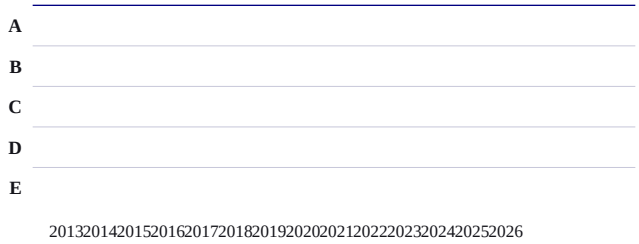
Scoreboard	
Reliability	0.76 AUC filers with under $12.5M assets; 95% interval 0.65 to 0.86; 63 events, 2020 to 2025
Peer failure rate	0.60% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	under $12.5M assets total assets $1.2M
Standard universe	outside revenue above $1M and assets above $10M
Warnings	late filer, thin data not computable: dilution, distress, fortress balance sheet
Inputs computable	5 of 14
Graded from	filings received through Mar 12, 2026 240 days before the rescan; latest periodic filing 10-Q received Aug 13, 2026
Last close	$0.85 2026-11-04; 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 Mar 12, 2026

developing advanced robotic and drone-based systems. Our technologies include an advanced robotic stabilization system that enables remote, real-time, pinpoint-accurate firing of small arms and light weapons, as well as civilian drone-based solutions focused on infrastructure maintenance, which is a drone technology for conducting routine maintenance of critical infrastructure for electric utility insulator technology was initially designed for use on unmanned aerial systems ("UAS"), our robotic solutions are adaptable to other Unlimited Aerial Systems, LLP ("UAS LLP").

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 39.7						
Gross profitability	14.3%	21.9%		74.3	275	2025-12-31
Return on invested capital	not computable	9.7%				
one or more required annual facts are missing						

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Accruals ratio	(29.9%)	(3.6%)	5.1	306	2025-12-31
Gross margin stability, five years	not computable	2.1 pts			
five consecutive annual gross margins are required					
Solvency, sleeve percentile 91.5					
Twelve-month failure probability	not computable	0.04%			
firm-wide XBRL shares cannot be assigned to one ticker class					
Altman Z double-prime	(37.98)	3.66	97.7	242	2025-12-31
Net debt to EBITDA	not computable	1.78x			
one or more required annual facts are missing					
Interest coverage	not computable	5.09x			
interest expense must exceed $100,000					
Current ratio	1.20x	2.25x	85.2	323	2025-12-31
Growth and financing, sleeve percentile 98.4					
Revenue growth, three-year compound	not computable	2.2%			
four consecutive annual observations are required					
Free cash flow growth, three-year compound	not computable	13.5%			
current FCF must be positive and base FCF must exceed $100,000					
Reinvestment rate	not computable	26.1%			
one or more required annual facts are missing					
Asset growth, three years	(25.3%)	4.3%	98.4	277	2025-12-31
Net share issuance, one year	not computable	0.01%			
firm-wide XBRL shares cannot be assigned to one ticker class					

Warnings

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

Check	Measured
Late filer	found 1 NT 10-K/Q filings in the last eight quarters
Thin data	5 of 14 grade factors are computable; minimum is 7

What the price implies

at the 2026-11-04 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	not computable	9.8%	
Distance from 52-week high	(59.3%)	(27.4%)	13
EBIT to enterprise value	not computable	4.2%	
Free cash flow yield	not computable	3.5%	
Book value to price	not computable	0.37	
Sales to price	not computable	0.55	
Composite equity issuance, five years	not computable	(9.6%)	
Relative strength against the sector, log excess return	not computable	0.01	

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
Current ratio improved	fail
No new shares issued	fail

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Gross margin improved	pass
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$7.0M
Operating cash flow, four quarters	-$1.5M
Months of runway	55.0
Days since last periodic filing	86 (10-Q received Aug 13, 2026)
Median daily dollar volume, 63 sessions	$2,246

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	gross profit	us-gaap:GrossProfit	$179,000	2025-12-31	2026-03-12	10-K	26-026927
2	assets	us-gaap:Assets	$1.2M	2025-12-31	2026-03-12	10-K	26-026927
3	net income	us-gaap:NetIncomeLoss	-$1.2M	2025-12-31	2026-03-12	10-K	26-026927
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$811,000	2025-12-31	2026-03-12	10-K	26-026927
5	assets	us-gaap:Assets	$1.6M	2024-12-31	2026-03-12	10-K	26-026927
6	current assets	us-gaap:AssetsCurrent	$907,000	2025-12-31	2026-03-12	10-K	26-026927
7	current liabilities	us-gaap:LiabilitiesCurrent	$756,000	2025-12-31	2026-03-12	10-K	26-026927
8	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$12.4M	2025-12-31	2026-03-12	10-K	26-026927
9	operating income	us-gaap:OperatingIncomeLoss	-$1.2M	2025-12-31	2026-03-12	10-K	26-026927
10	book equity	us-gaap:StockholdersEquity	$100,000	2025-12-31	2026-03-12	10-K	26-026927
11	liabilities	us-gaap:Liabilities	$1.1M	2025-12-31	2026-03-12	10-K	26-026927
12	operating income	us-gaap:OperatingIncomeLoss	-$1.3M	2020-12-31	2022-03-07	10-K	22-010947
13	interest expense	us-gaap:InterestAndDebtExpense	$63,000	2020-12-31	2021-03-30	10-K	21-018451
14	revenue	us-gaap:Revenues	$377,000	2025-12-31	2026-03-12	10-K	26-026927
15	revenue	us-gaap:Revenues	$108,000	2024-12-31	2026-03-12	10-K	26-026927
16	revenue	us-gaap:Revenues	$300,000	2023-12-31	2025-03-20	10-K	25-025286
17	revenue	us-gaap:Revenues	$500,000	2021-12-31	2023-03-24	10-K	23-022590
18	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$205,000	2025-12-31	2026-03-12	10-K	26-026927
19	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$918,000	2024-12-31	2026-03-12	10-K	26-026927
20	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$77,000	2024-12-31	2026-03-12	10-K	26-026927
21	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$548,000	2023-12-31	2025-03-20	10-K	25-025286
22	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$18,000	2023-12-31	2025-03-20	10-K	25-025286
23	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$672,000	2022-12-31	2024-03-15	10-K	24-022826
24	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$35,000	2022-12-31	2024-03-15	10-K	24-022826
25	assets	us-gaap:Assets	$2.5M	2023-12-31	2025-03-20	10-K	25-025286
26	assets	us-gaap:Assets	$3.0M	2022-12-31	2024-03-15	10-K	24-022826

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