Rocket One Inc.

RKTO

Nasdaq; healthcare; SIC 2834, Pharmaceutical Preparations; CIK 0001711786

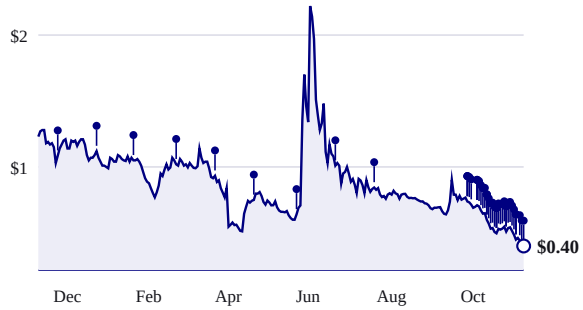
None

No letter

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

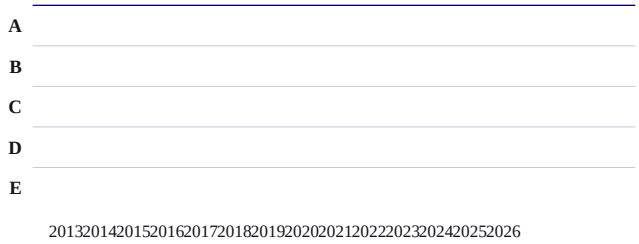
Scoreboard	
Reliability	0.76 AUC filers with under $12.5M assets; 95% interval 0.65 to 0.86; 63 events, 2020 to 2025
Peer failure rate	0.60% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	under $12.5M assets total assets $7.6M
Warnings	thin data not computable: degenerate inputs, distress, fortress balance sheet
Inputs computable	4 of 14
Graded from	filings received through Mar 27, 2026 226 days before the rescan; latest periodic filing 10-Q received Aug 14, 2026
Last close	$0.40 2026-11-05; market equity $10.0M; 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 27, 2026

focused on developing new generation therapies for unmet medical needs. We are focused on developing (i) a topical formulation for treating side effects from drugs used for the treatment of cancer (HT-001); (ii) a treatment for mast-cell derived cancers and anaphylaxis (HT-KIT); and (iii) a treatment and/or prevention for Alzheimer's or other neuroinflammatory diseases (HT-ALZ). We also have assets being developed for (i) atopic dermatitis (also known as eczema) (BioLexa); (ii) a treatment for asthma and allergies using inhalational administration (HT-004); and (iii) a treatment for obesity, and obesity-related diseases and conditions (HT-VA).

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 11.6						
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	(34.8%)	(6.6%)		11.6	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 60.4						
Twelve-month failure probability	not computable	0.08%				
latest liabilities, cash plus short-term investments, book equity, and shares are required						
Altman Z double-prime	(33.06)	(0.37)		82.3	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	4.72x	2.94x		38.6	828	2025-12-31
Growth and financing, sleeve percentile 62.6						
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%				
four consecutive annual FCF observations are required; found 0						
Reinvestment rate	not computable	37.1%				
one or more required annual facts are missing						
Asset growth, three years	not computable	2.2%				
four consecutive annual observations are required						
Net share issuance, one year	23.4%	2.5%		62.6	630	2026-03-26

Warnings

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

Check	Measured
Thin data	4 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	(49.7%)	(2.1%)	15
Distance from 52-week high	(81.9%)	(30.5%)	8
EBIT to enterprise value	not computable	(1.5%)	
Free cash flow yield	not computable	(1.0%)	
Book value to price	0.82	0.29	81
Sales to price	not computable	0.30	
Composite equity issuance, five years	330.8%	21.4%	96
Relative strength against the sector, log excess return	(0.85)	(0.19)	15

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	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$7.9M
Operating cash flow, four quarters	-$10.7M
Months of runway	8.9
Days since last periodic filing	86 (10-Q received Aug 14, 2026)
Median daily dollar volume, 63 sessions	$161,297

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	-$12.5M	2025-12-31	2026-03-27	10-K	26-035625
2	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$9.8M	2025-12-31	2026-03-27	10-K	26-035625
3	assets	us-gaap:Assets	$7.6M	2025-12-31	2026-03-27	10-K	26-035625
4	assets	us-gaap:Assets	$7.7M	2024-12-31	2026-03-27	10-K	26-035625
5	current assets	us-gaap:AssetsCurrent	$6.9M	2025-12-31	2026-03-27	10-K	26-035625
6	current liabilities	us-gaap:LiabilitiesCurrent	$1.5M	2025-12-31	2026-03-27	10-K	26-035625
7	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$72.9M	2025-12-31	2026-03-27	10-K	26-035625
8	operating income	us-gaap:OperatingIncomeLoss	-$12.4M	2025-12-31	2026-03-27	10-K	26-035625
9	book equity	us-gaap:StockholdersEquity	$6.2M	2025-12-31	2026-03-27	10-K	26-035625
10	liabilities	us-gaap:Liabilities	$1.5M	2025-12-31	2026-03-27	10-K	26-035625
11	assets	us-gaap:Assets	$8.7M	2024-09-30	2025-03-28	10-K	25-004108
12	assets	us-gaap:Assets	$10.6M	2024-06-30	2025-03-28	10-K	25-004108
13	shares outstanding	dei:EntityCommonStockSharesOutstanding	16,257,652	2026-03-26	2026-03-27	10-K	26-035625
14	shares outstanding	dei:EntityCommonStockSharesOutstanding	13,170,715	2025-03-28	2025-03-28	10-K	25-004108

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