ClearPoint Neuro, Inc.

CLPT

Nasdaq; healthcare; SIC 3841, Surgical & Medical Instruments & Apparatus; CIK 0001285550

C

middle fifth of 370 graded peers in healthcare

rank 178 of 370; percentile 48.0; sampling error 2.5 points; lower is stronger

A B C D E

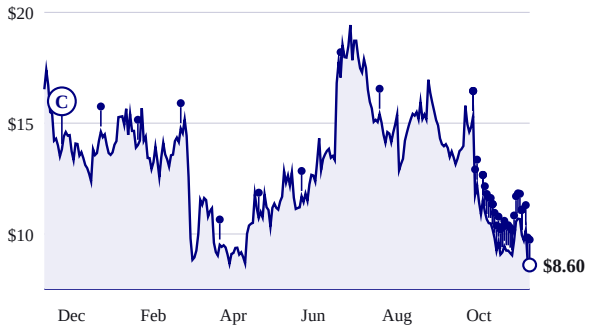
C, the tortoise



Scoreboard

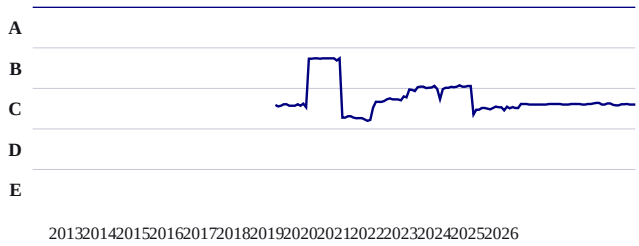
Profitability	D percentile 66.3
Solvency	B/C percentile 41.7
Growth and financing	B percentile 32.8
Reliability	0.83 AUC filers with $12.5M to $120M assets; 95% interval 0.79 to 0.86; 201 events, 2020 to 2025
Peer failure rate	1.07% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$12.5M to $120M assets total assets $97.7M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress
Inputs computable	8 of 14
Graded from	filings received through Mar 17, 2026 237 days before the rescan; latest periodic filing 10-Q received Oct 28, 2026
Last close	$8.59 2026-11-06; market equity $275.3M; 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 17, 2026

We are a commercial-stage medical device company, incorporated in 1998 as a Delaware corporation, that develops and commercializes integrated systems used in minimally invasive neurosurgical procedures in the brain. From our inception in 1998, we have deployed significant resources to fund our efforts to develop the foundational capabilities for enabling magnetic resonance imaging ("MRI") guided interventions, building an intellectual property portfolio, and identifying and building out commercial applications for the technologies we develop.

The fourteen inputs

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

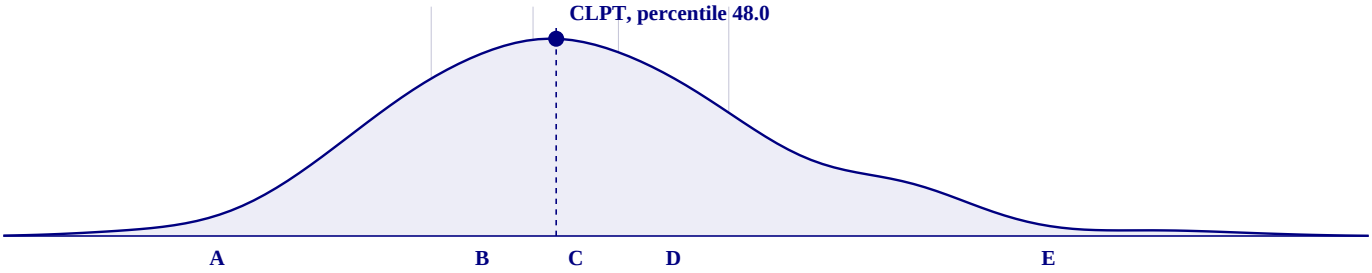
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 66.3						
Gross profitability	23.2%	32.3%		58.8	365	2025-12-31
Return on invested capital	not computable	9.3%				
prior invested-capital observation is 731 days earlier						

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Accruals ratio	(2.4%)	(6.6%)	75.0	802	2025-12-31
Gross margin stability, five years	4.0 pts	2.8 pts	65.1	242	2025-12-31
Solvency, sleeve percentile 41.7					
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	(4.93)	(0.37)	52.3	747	2025-12-31
Net debt to EBITDA	not computable	1.82x			
EBITDA must exceed $100,000					
Interest coverage	not computable	(4.51x)			
interest expense must exceed $100,000					
Current ratio	5.91x	2.94x	31.1	828	2025-12-31
Growth and financing, sleeve percentile 32.8					
Revenue growth, three-year compound	21.6%	10.0%	29.9	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%			
pretax income must exceed the validity floor and imply a 0%-100% tax rate					
Asset growth, three years	20.8%	2.2%	20.7	696	2025-12-31
Net share issuance, one year	7.4%	2.5%	47.7	630	2026-03-06

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
173	Orasure Technologies Inc. (OSUR)	46.6	C	
174	Anika Therapeutics, Inc. (ANIK)	46.9	C	fortress balance sheet
175	Enovis Corp. (ENOV)	47.2	C	
176	Align Technology Inc. (ALGN)	47.4	C	
177	Johnson & Johnson (JNJ)	47.7	C	
178	ClearPoint Neuro, Inc. (CLPT)	48.0	C	
179	Kymera Therapeutics, Inc. (KYMR)	48.2	C	dilution
180	Scynexis Inc. (SCYX)	48.5	C	fortress balance sheet
181	Savara Inc. (SVRA)	48.8	C	short runway, fortress balance sheet
182	Amneal Pharmaceuticals, Inc. (AMRX)	49.1	C	
183	Macrogenics Inc. (MGNX)	49.3	C	

What the price implies

at the 2026-11-06 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(47.4%)	(2.1%)	16
Distance from 52-week high	(55.7%)	(30.4%)	25
EBIT to enterprise value	(8.6%)	(1.5%)	36
Free cash flow yield	(8.9%)	(1.0%)	34

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Book value to price	0.10	0.29	24
Sales to price	0.13	0.30	32
Composite equity issuance, five years	43.9%	20.8%	62
Relative strength against the sector, log excess return	(0.81)	(0.19)	16

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	pass
No new shares issued	fail
Gross margin improved	pass
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$46.2M
Operating cash flow, four quarters	-$47.2M
Months of runway	11.8
Days since last periodic filing	12 (10-Q received Oct 28, 2026)
Median daily dollar volume, 63 sessions	$7.5M

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	$22.7M	2025-12-31	2026-03-17	10-K	26-111231
2	assets	us-gaap:Assets	$97.7M	2025-12-31	2026-03-17	10-K	26-111231
3	operating income	us-gaap:OperatingIncomeLoss	-$24.2M	2025-12-31	2026-03-17	10-K	26-111231
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$25.5M	2025-12-31	2026-03-17	10-K	26-111231
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$55,000	2025-12-31	2026-03-17	10-K	26-111231
6	total debt	us-gaap:LongTermDebt	$49.1M	2025-12-31	2026-03-17	10-K	26-111231
7	book equity	us-gaap:StockholdersEquity	$28.0M	2025-12-31	2026-03-17	10-K	26-111231
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$45.9M	2025-12-31	2026-03-17	10-K	26-111231
9	total debt	us-gaap:LongTermDebt	$9.9M	2023-12-31	2024-03-12	10-K	24-000031
10	book equity	us-gaap:StockholdersEquity	$21.2M	2023-12-31	2026-03-17	10-K	26-111231
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$23.1M	2023-12-31	2025-02-26	10-K	25-027934
12	net income	us-gaap:NetIncomeLoss	-$25.5M	2025-12-31	2026-03-17	10-K	26-111231
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$23.9M	2025-12-31	2026-03-17	10-K	26-111231
14	assets	us-gaap:Assets	$39.2M	2024-12-31	2026-03-17	10-K	26-111231
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$37.0M	2025-12-31	2026-03-17	10-K	26-111231
16	gross profit	us-gaap:GrossProfit	$19.1M	2024-12-31	2026-03-17	10-K	26-111231
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$31.4M	2024-12-31	2026-03-17	10-K	26-111231
18	gross profit	us-gaap:GrossProfit	$13.6M	2023-12-31	2025-02-26	10-K	25-027934
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$24.0M	2023-12-31	2025-02-26	10-K	25-027934
20	gross profit	us-gaap:GrossProfit	$13.5M	2022-12-31	2024-03-12	10-K	24-000031
21	revenue	us-gaap:Revenues	$20.6M	2022-12-31	2024-03-12	10-K	24-000031
22	gross profit	us-gaap:GrossProfit	$11.1M	2021-12-31	2023-03-01	10-K	23-000020
23	revenue	us-gaap:Revenues	$16.3M	2021-12-31	2023-03-01	10-K	23-000020
24	current assets	us-gaap:AssetsCurrent	$63.6M	2025-12-31	2026-03-17	10-K	26-111231
25	current liabilities	us-gaap:LiabilitiesCurrent	$10.8M	2025-12-31	2026-03-17	10-K	26-111231
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$216.9M	2025-12-31	2026-03-17	10-K	26-111231

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27	liabilities	us-gaap:Liabilities	$69.7M	2025-12-31	2026-03-17	10-K	26-111231
28	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$814,000	2025-12-31	2026-03-17	10-K	26-111231
29	operating income	us-gaap:OperatingIncomeLoss	-$16.3M	2022-12-31	2024-03-12	10-K	24-000031
30	interest expense	us-gaap:InterestExpense	$81,000	2022-12-31	2023-03-01	10-K	23-000020
31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$522,000	2025-12-31	2026-03-17	10-K	26-111231
32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$8.9M	2024-12-31	2026-03-17	10-K	26-111231
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$275,000	2024-12-31	2026-03-17	10-K	26-111231
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$13.7M	2023-12-31	2025-02-26	10-K	25-027934
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$717,000	2023-12-31	2025-02-26	10-K	25-027934
36	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$16.2M	2022-12-31	2024-03-12	10-K	24-000031
37	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$253,000	2022-12-31	2024-03-12	10-K	24-000031
38	current assets	us-gaap:AssetsCurrent	$33.4M	2024-12-31	2026-03-17	10-K	26-111231
39	current liabilities	us-gaap:LiabilitiesCurrent	$10.4M	2024-12-31	2026-03-17	10-K	26-111231
40	assets	us-gaap:Assets	$42.7M	2023-12-31	2025-02-26	10-K	25-027934
41	assets	us-gaap:Assets	$55.5M	2022-12-31	2024-03-12	10-K	24-000031
42	shares outstanding	dei:EntityCommonStockSharesOutstanding	29,663,875	2026-03-06	2026-03-17	10-K	26-111231
43	shares outstanding	dei:EntityCommonStockSharesOutstanding	27,632,332	2025-02-18	2025-02-26	10-K	25-027934

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