Sadot Group Inc.

SDOT

Nasdaq; shops; SIC 5810, Retail-Eating & Drinking Places; CIK 0001701756

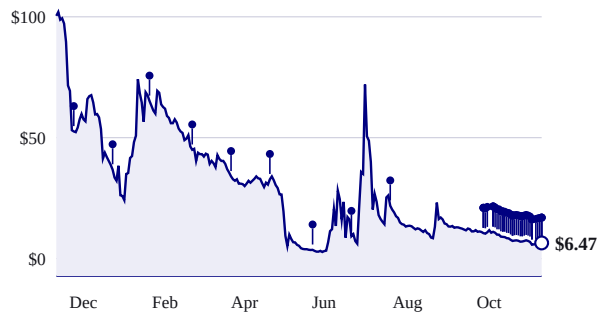
None

No letter

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

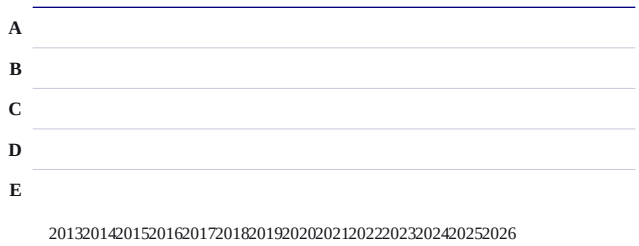
Scoreboard	
Reliability	0.76 AUC filers with under $12.5M assets; 95% interval 0.65 to 0.86; 63 events, 2020 to 2025
Peer failure rate	0.60% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	under $12.5M assets total assets $2.9M
Standard universe	outside revenue above $1M and assets above $10M
Warnings	dilution, late filer, thin data not computable: short runway, distress, fortress balance sheet
Inputs computable	6 of 14
Graded from	filings received through Apr 29, 2026 195 days before the rescan; latest periodic filing 10-Q received Aug 14, 2026
Last close	$6.39 2026-11-09; market equity $8.4M; 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 Apr 29, 2026

or together with its subsidiaries, the "Company" or "Sadot"), a Nevada corporation was incorporated in Nevada on October 25, 2019. The principal corporate office of Sadot Group is located at 295 E Renfro St., Suite 300, Burleson, Texas, 76028, and the telephone number at that location is (832) 604-9568. Our website address is www.sadotgroupinc.com. to in this Form 10-K annual report ("Form 10-K") as the Company. The terms "we", "us" and "our" are also used in the Form 10-K to refer to the Company. Throughout the Form 10-K, the terms "restaurants", "stores", "eatery" and "locations" are used interchangeably.

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 1.3						
Gross profitability	157.7%	42.0%		1.3	238	2025-12-31
Return on invested capital	not computable	10.9%				
one or more required annual facts are missing						

Accruals ratio	(101.1%)	(4.9%)	1.4	283	2025-12-31
Gross margin stability, five years	not computable	1.3 pts			
five annual gross margins are required; found 2					
Solvency, sleeve percentile 100.0					
Twelve-month failure probability	not computable	0.03%			
latest liabilities, cash plus short-term investments, book equity, and shares are required					
Altman Z double-prime	(417.84)	1.93	100.0	204	2025-12-31
Net debt to EBITDA	not computable	1.38x			
one or more required annual facts are missing					
Interest coverage	not computable	3.27x			
interest expense must exceed $100,000					
Current ratio	0.05x	1.37x	100.0	295	2025-12-31
Growth and financing, sleeve percentile 98.1					
Revenue growth, three-year compound	not computable	1.6%			
four consecutive annual observations are required					
Free cash flow growth, three-year compound	not computable	4.6%			
current FCF must be positive and base FCF must exceed $100,000					
Reinvestment rate	not computable	17.6%			
latest aligned inputs end 2024-12-31; latest annual assets end 2025-12-31					
Asset growth, three years	(52.6%)	3.4%	99.6	267	2025-12-31
Net share issuance, one year	213.0%	(0.6%)	96.6	209	2026-04-28

Warnings

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

Check	Measured
Dilution	split-adjusted year-over-year share growth is 213.0%
Late filer	found 2 NT 10-K/Q filings in the last eight quarters
Thin data	6 of 14 grade factors are computable; minimum is 7

What the price implies

at the 2026-11-09 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(91.0%)	(0.8%)	1
Distance from 52-week high	(93.7%)	(19.6%)	2
EBIT to enterprise value	(659.4%)	5.1%	1
Free cash flow yield	(32.9%)	3.8%	8
Book value to price	(1.00)	0.35	2
Sales to price	28.89	1.55	98
Composite equity issuance, five years	525.2%	(16.9%)	99
Relative strength against the sector, log excess return	(2.31)	0.08	1

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 1 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

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.

Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	n/a
Operating cash flow, four quarters	n/a
Months of runway	not finite
Days since last periodic filing	88 (10-Q received Aug 14, 2026)
Median daily dollar volume, 63 sessions	$665,189

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	$4.6M	2025-12-31	2026-04-29	10-K	26-000630
2	assets	us-gaap:Assets	$2.9M	2025-12-31	2026-04-29	10-K	26-000630
3	net income	us-gaap:NetIncomeLoss	-$93.4M	2025-12-31	2026-04-29	10-K	26-000630
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesC...	-$8.7M	2025-12-31	2026-04-29	10-K	26-000630
5	assets	us-gaap:Assets	$164.7M	2024-12-31	2026-04-29	10-K	26-000630
6	current assets	us-gaap:AssetsCurrent	$2.8M	2025-12-31	2026-04-29	10-K	26-000630
7	current liabilities	us-gaap:LiabilitiesCurrent	$57.6M	2025-12-31	2026-04-29	10-K	26-000630
8	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$176.6M	2025-12-31	2026-04-29	10-K	26-000630
9	operating income	us-gaap:OperatingIncomeLoss	-$40.5M	2025-12-31	2026-04-29	10-K	26-000630
10	book equity	us-gaap:StockholdersEquity	-$57.4M	2025-12-31	2026-04-29	10-K	26-000630
11	liabilities	us-gaap:Liabilities	$57.6M	2025-12-31	2026-04-29	10-K	26-000630
12	operating income	us-gaap:OperatingIncomeLoss	-$8.1M	2022-12-31	2024-03-20	10-K	24-000040
13	interest expense	us-gaap:InterestExpense	$6,730	2022-12-31	2023-03-21	10-K	23-008370
14	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$246.9M	2025-12-31	2026-04-29	10-K	26-000630
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$700.9M	2024-12-31	2026-04-29	10-K	26-000630
16	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$161.7M	2022-12-31	2023-03-21	10-K	23-008370
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$10.3M	2021-12-31	2023-03-21	10-K	23-008370
18	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesC...	-$2.8M	2024-12-31	2026-04-29	10-K	26-000630
19	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$37,000	2024-12-31	2026-04-29	10-K	26-000630
20	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$13.4M	2023-12-31	2024-03-20	10-K	24-000040
21	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$7.3M	2023-12-31	2025-03-11	10-K	25-000043
22	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$198,000	2022-12-31	2024-03-20	10-K	24-000040
23	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$597,000	2022-12-31	2024-03-20	10-K	24-000040
24	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$6.4M	2021-12-31	2023-03-21	10-K	23-008370
25	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$262,019	2021-12-31	2023-03-21	10-K	23-008370
26	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$259,000	2024-12-31	2026-04-29	10-K	26-000630
27	operating income	us-gaap:OperatingIncomeLoss	$6.2M	2024-12-31	2026-04-29	10-K	26-000630
28	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$5.6M	2024-12-31	2026-04-29	10-K	26-000630
29	income tax	us-gaap:IncomeTaxExpenseBenefit	$3,000	2024-12-31	2026-04-29	10-K	26-000630
30	current assets	us-gaap:AssetsCurrent	$152.7M	2024-12-31	2026-04-29	10-K	26-000630
31	current liabilities	us-gaap:LiabilitiesCurrent	$132.2M	2024-12-31	2026-04-29	10-K	26-000630
32	current assets	us-gaap:AssetsCurrent	$112.9M	2023-12-31	2025-03-11	10-K	25-000043
33	current liabilities	us-gaap:LiabilitiesCurrent	$104.6M	2023-12-31	2025-03-11	10-K	25-000043
34	assets	us-gaap:Assets	$178.1M	2023-12-31	2025-03-11	10-K	25-000043
35	assets	us-gaap:Assets	$27.2M	2022-12-31	2024-03-20	10-K	24-000040
36	shares outstanding	dei:EntityCommonStockSharesOutstanding	1,835,668	2026-04-28	2026-04-29	10-K	26-000630
37	shares outstanding	dei:EntityCommonStockSharesOutstanding	5,865,476	2025-03-11	2025-03-11	10-K	25-000043

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