Oric Pharmaceuticals, Inc.

ORIC

Nasdaq; healthcare; SIC 2834, Pharmaceutical Preparations; CIK 0001796280

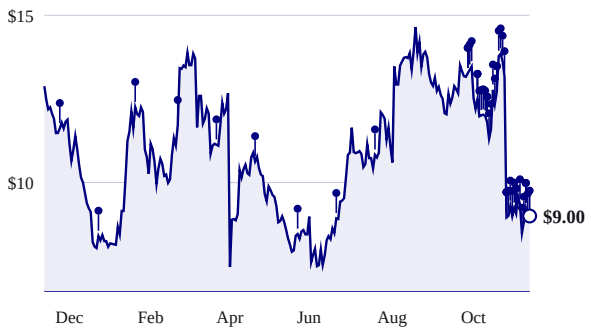
None

No letter

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

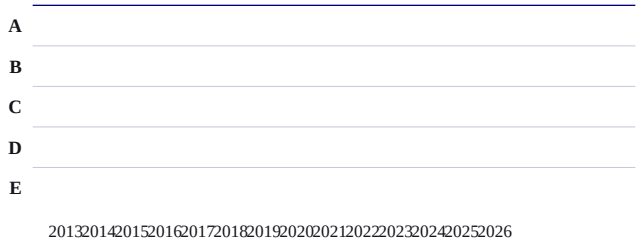
Scoreboard	
Reliability	0.87 AUC filers with $120M to $591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025
Peer failure rate	1.03% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$120M to $591M assets total assets $408.9M
Warnings	dilution, short runway, thin data; fortr... not computable: degenerate inputs, distress
Inputs computable	5 of 14
Graded from	filings received through Feb 23, 2026 262 days before the rescan; latest periodic filing 10-Q received Aug 3, 2026
Last close	$8.98 2026-11-11; market equity $930.8M; 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 Feb 23, 2026

ORIC Pharmaceuticals is a clinical-stage biopharmaceutical company dedicated to improving patients' lives by Overcoming Resistance In Cancer. Profound advancements in oncology drug development have expanded the treatment options available to patients, yet therapeutic resistance and relapse continue to limit the efficacy and duration of clinical benefit of such treatments. Collectively, our founders and management team have a decades-long heritage of identifying and characterizing resistance mechanisms in oncology, having discovered, developed and commercialized groundbreaking medicines at companies such as Ignyta, Medivation, Aragon, Pharmacyclics, Deciphera and Genentech.

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 60.2						
Gross profitability	not computable	32.3%				
one or more required annual facts are missing						

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Return on invested capital	not computable	9.3%			
one or more required annual facts are missing					
Accruals ratio	(5.4%)	(6.6%)	60.2	801	2025-12-31
Gross margin stability, five years	not computable	2.8 pts			
five annual gross margins are required; found 0					
Solvency, sleeve percentile 7.7					
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	12.88	(0.35)	6.7	745	2025-12-31
Net debt to EBITDA	not computable	1.82x			
EBITDA must exceed $100,000					
Interest coverage	not computable	(4.51x)			
one or more required annual facts are missing					
Current ratio	14.13x	2.95x	8.6	827	2025-12-31
Growth and financing, sleeve percentile 47.8					
Revenue growth, three-year compound	not computable	10.1%			
four annual observations are required; found 0					
Free cash flow growth, three-year compound	not computable	11.0%			
current FCF must be positive and base FCF must exceed $100,000					
Reinvestment rate	not computable	37.1%			
one or more required annual facts are missing					
Asset growth, three years	18.3%	2.2%	22.5	695	2025-12-31
Net share issuance, one year	41.3%	2.5%	73.0	628	2026-02-12

Warnings

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

Check	Measured
Dilution	split-adjusted year-over-year share growth is 41.3%
Short runway	cash runway is 4.0 months
Thin data	5 of 14 grade factors are computable; minimum is 7
Fortress balance sheet	cash minus debt is 215,506,000 USD; Altman Z is not used

What the price implies

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

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	2.4%	(1.9%)	53
Distance from 52-week high	(38.6%)	(27.8%)	39
EBIT to enterprise value	(15.8%)	(1.6%)	28
Free cash flow yield	(12.0%)	(1.0%)	30
Book value to price	0.41	0.27	63
Sales to price	not computable	0.29	
Composite equity issuance, five years	103.8%	20.8%	77
Relative strength against the sector, log excess return	(0.14)	(0.19)	53

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

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Long-term leverage fell	fail
Current ratio improved	pass
No new shares issued	fail
Gross margin improved	fail
Asset turnover improved	fail

Cash, filings, liquidity

Cash and equivalents	$37.5M
Operating cash flow, four quarters	-$111.6M
Months of runway	4.0
Days since last periodic filing	101 (10-Q received Aug 3, 2026)
Median daily dollar volume, 63 sessions	$15.3M

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	-$129.5M	2025-12-31	2026-02-23	10-K	26-064005
2	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$111.0M	2025-12-31	2026-02-23	10-K	26-064005
3	assets	us-gaap:Assets	$408.9M	2025-12-31	2026-02-23	10-K	26-064005
4	assets	us-gaap:Assets	$274.1M	2024-12-31	2026-02-23	10-K	26-064005
5	current assets	us-gaap:AssetsCurrent	$288.5M	2025-12-31	2026-02-23	10-K	26-064005
6	current liabilities	us-gaap:LiabilitiesCurrent	$20.4M	2025-12-31	2026-02-23	10-K	26-064005
7	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$692.2M	2025-12-31	2026-02-23	10-K	26-064005
8	operating income	us-gaap:OperatingIncomeLoss	-$143.0M	2025-12-31	2026-02-23	10-K	26-064005
9	book equity	us-gaap:StockholdersEquity	$384.4M	2025-12-31	2026-02-23	10-K	26-064005
10	liabilities	us-gaap:Liabilities	$24.5M	2025-12-31	2026-02-23	10-K	26-064005
11	total debt	us-gaap:LongTermDebt	$10.5M	2021-12-31	2022-03-21	10-K	22-004239
12	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$226.0M	2021-12-31	2023-03-16	10-K	23-008483
13	operating income	us-gaap:OperatingIncomeLoss	-$78.9M	2021-12-31	2023-03-16	10-K	23-008483
14	depreciation amortization	us-gaap:Depreciation	$897,000	2021-12-31	2023-03-16	10-K	23-008483
15	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$712,000	2025-12-31	2026-02-23	10-K	26-064005
16	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$112.7M	2024-12-31	2026-02-23	10-K	26-064005
17	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$1.2M	2024-12-31	2026-02-23	10-K	26-064005
18	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$85.7M	2023-12-31	2025-02-18	10-K	25-022273
19	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$849,000	2023-12-31	2025-02-18	10-K	25-022273
20	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$75.1M	2022-12-31	2024-03-11	10-K	24-029298
21	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$2.1M	2022-12-31	2024-03-11	10-K	24-029298
22	assets	us-gaap:Assets	$252.0M	2023-12-31	2025-02-18	10-K	25-022273
23	assets	us-gaap:Assets	$247.2M	2022-12-31	2024-03-11	10-K	24-029298
24	shares outstanding	dei:EntityCommonStockSharesOutstanding	100,358,242	2026-02-12	2026-02-23	10-K	26-064005
25	shares outstanding	dei:EntityCommonStockSharesOutstanding	71,026,825	2025-02-04	2025-02-18	10-K	25-022273

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