Sensus Healthcare, Inc.

SRTS

Nasdaq; healthcare; SIC 3841, Surgical & Medical Instruments & Apparatus; CIK 0001494891

B

second fifth of 369 graded peers in healthcare

rank 99 of 369; percentile 26.6; sampling error 2.5 points; lower is stronger

A B C D E

B, the elk



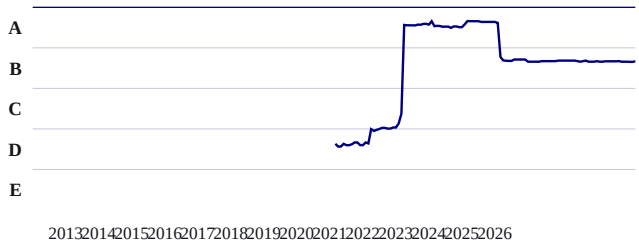
Scoreboard	
Profitability	C/D percentile 58.0
Solvency	A percentile 11.3
Growth and financing	C percentile 51.7
Reliability	0.83 AUC filers with $12.5M to $120M assets; 95% interval 0.79 to 0.86; 201 events, 2020 to 2025
Peer failure rate	1.07% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$12.5M to $120M assets total assets $53.0M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress, fortress balance sheet
Inputs computable	8 of 14
Graded from	filings received through Mar 4, 2026 253 days before the rescan; latest periodic filing 10-Q received Aug 14, 2026
Last close	$3.38 2026-11-11; market equity $55.7M; 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 4, 2026

its subsidiaries, Sensus Medical Devices Ltd. and Sensus Healthcare Services, LLC, unless the context otherwise indicates, "Sensus," "we," "us," "our," or the "Company") is a medical device company committed to providing highly effective, non-invasive treatments for non-melanoma skin cancer (NMSC) and post-surgical keloid scar prevention. The Company uses a proprietary low-energy X-ray technology known as superficial radiation therapy ("SRT"), which is based on decades of dedicated research and development, and has successfully incorporated SRT into a portfolio of treatment devices: the SRT-100TM, SRT-100+TM and SRT-100 VisionTM.

The fourteen inputs

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

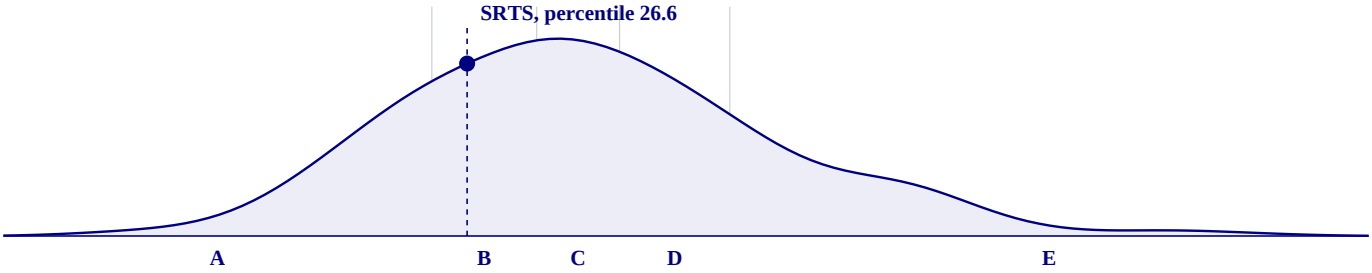
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 58.0						
Gross profitability	22.4%	32.3%		60.7	365	2025-12-31
Return on invested capital	not computable	9.3%				
one or more required annual facts are missing						

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.

Accruals ratio	(14.3%)	(6.6%)	31.5	801	2025-12-31
Gross margin stability, five years	7.9 pts	2.8 pts	81.7	242	2025-12-31
Solvency, sleeve percentile 11.3					
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	14.36	(0.35)	5.2	745	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)			
latest aligned inputs end 2024-12-31; latest annual assets end 2025-12-31					
Current ratio	9.72x	2.95x	17.4	827	2025-12-31
Growth and financing, sleeve percentile 51.7					
Revenue growth, three-year compound	(14.9%)	10.1%	87.3	412	2025-12-31
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%			
NOPAT must exceed $100,000					
Asset growth, three years	(2.2%)	2.2%	56.6	695	2025-12-31
Net share issuance, one year	(0.2%)	2.5%	11.2	628	2026-02-24

Among 369 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
94	4D Molecular Therapeutics, Inc. (FDMT)	25.3	B	dilution, short runway
95	Rhythm Pharmaceuticals, Inc. (RYTM)	25.5	B	short runway
96	GE HealthCare Technologies Inc. (GEHC)	25.8	B	
97	Mannatech Inc. (MTEX)	26.1	B	late filer, fortress balance sheet
98	Phibro Animal Health Corp. (PAHC)	26.4	B	
99	Sensus Healthcare, Inc. (SRTS)	26.6	B	
100	Travere Therapeutics, Inc. (TVTX)	26.9	B	
101	Staar Surgical Co. (STAA)	27.2	B	
102	Tela Bio, Inc. (TELA)	27.4	B	fortress balance sheet
103	Alphatec Holdings, Inc. (ATEC)	27.7	B	
104	Myriad Genetics Inc. (MYGN)	28.0	B	fortress balance sheet

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	(6.3%)	(1.9%)	46
Distance from 52-week high	(35.7%)	(27.8%)	42
EBIT to enterprise value	not computable	(1.6%)	
Free cash flow yield	0.6%	(1.0%)	58

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.

Book value to price	0.66	0.27	76
Sales to price	0.49	0.29	66
Composite equity issuance, five years	(0.1%)	20.8%	27
Relative strength against the sector, log excess return	(0.23)	(0.19)	46

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	pass
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	pass
Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$15.2M
Operating cash flow, four quarters	-$6.8M
Months of runway	26.8
Days since last periodic filing	90 (10-Q received Aug 14, 2026)
Median daily dollar volume, 63 sessions	$75,875

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	$11.9M	2025-12-31	2026-03-04	10-K	26-000435
2	assets	us-gaap:Assets	$53.0M	2025-12-31	2026-03-04	10-K	26-000435
3	net income	us-gaap:NetIncomeLoss	-$7.7M	2025-12-31	2026-03-04	10-K	26-000435
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$528,000	2025-12-31	2026-03-04	10-K	26-000435
5	assets	us-gaap:Assets	$62.2M	2024-12-31	2026-03-04	10-K	26-000435
6	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$27.5M	2025-12-31	2026-03-04	10-K	26-000435
7	gross profit	us-gaap:GrossProfit	$24.4M	2024-12-31	2026-03-04	10-K	26-000435
8	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$41.8M	2024-12-31	2026-03-04	10-K	26-000435
9	gross profit	us-gaap:GrossProfit	$14.1M	2023-12-31	2025-03-05	10-K	25-000408
10	revenue	us-gaap:Revenues	$24.4M	2023-12-31	2025-03-05	10-K	25-000408
11	gross profit	us-gaap:GrossProfit	$29.6M	2022-12-31	2024-03-15	10-K	24-023093
12	revenue	us-gaap:Revenues	$44.5M	2022-12-31	2024-03-15	10-K	24-023093
13	gross profit	us-gaap:GrossProfit	$17.0M	2021-12-31	2023-03-23	10-K	23-022355
14	revenue	us-gaap:Revenues	$27.0M	2021-12-31	2023-03-23	10-K	23-022355
15	current assets	us-gaap:AssetsCurrent	$45.9M	2025-12-31	2026-03-04	10-K	26-000435
16	current liabilities	us-gaap:LiabilitiesCurrent	$4.7M	2025-12-31	2026-03-04	10-K	26-000435
17	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$5.7M	2025-12-31	2026-03-04	10-K	26-000435
18	operating income	us-gaap:OperatingIncomeLoss	-$10.3M	2025-12-31	2026-03-04	10-K	26-000435
19	book equity	us-gaap:StockholdersEquity	$48.1M	2025-12-31	2026-03-04	10-K	26-000435
20	liabilities	us-gaap:Liabilities	$4.9M	2025-12-31	2026-03-04	10-K	26-000435
21	operating income	us-gaap:OperatingIncomeLoss	$8.1M	2024-12-31	2026-03-04	10-K	26-000435
22	interest expense	us-gaap:InterestExpense	-$932,000	2024-12-31	2025-03-05	10-K	25-000408
23	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$196,000	2025-12-31	2026-03-04	10-K	26-000435
24	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$831,000	2024-12-31	2026-03-04	10-K	26-000435
25	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$276,000	2024-12-31	2026-03-04	10-K	26-000435
26	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$2.1M	2023-12-31	2025-03-05	10-K	25-000408

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.

27	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$229,000	2023-12-31	2025-03-05	10-K	25-000408
28	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$1.4M	2022-12-31	2024-03-15	10-K	24-023093
29	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$159,000	2022-12-31	2024-03-15	10-K	24-023093
30	depreciation amortization	us-gaap:Depreciation	$386,000	2025-12-31	2026-03-04	10-K	26-000435
31	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$9.6M	2025-12-31	2026-03-04	10-K	26-000435
32	income tax	us-gaap:IncomeTaxExpenseBenefit	-$1.9M	2025-12-31	2026-03-04	10-K	26-000435
33	current assets	us-gaap:AssetsCurrent	$56.7M	2024-12-31	2026-03-04	10-K	26-000435
34	current liabilities	us-gaap:LiabilitiesCurrent	$5.9M	2024-12-31	2026-03-04	10-K	26-000435
35	assets	us-gaap:Assets	$53.7M	2023-12-31	2025-03-05	10-K	25-000408
36	assets	us-gaap:Assets	$56.7M	2022-12-31	2024-03-15	10-K	24-023093
37	shares outstanding	dei:EntityCommonStockSharesOutstanding	16,462,059	2026-02-24	2026-03-04	10-K	26-000435
38	shares outstanding	dei:EntityCommonStockSharesOutstanding	16,495,396	2025-02-12	2025-03-05	10-K	25-000408

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.