Unusual Machines, Inc.

UMAC

NYSE; business equipment; SIC 3663, Radio & Tv Broadcasting & Communications Equipment; CIK 0001956955

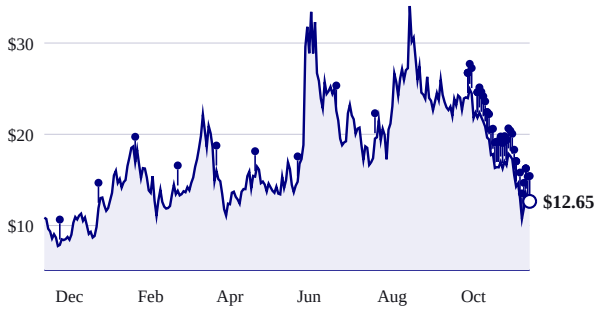
None

No letter

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

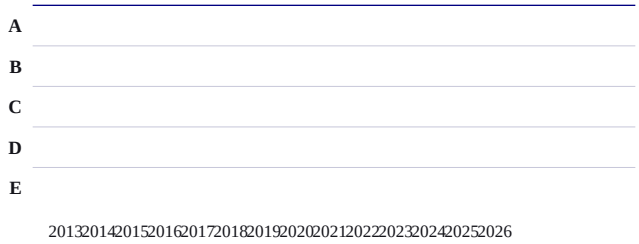
Scoreboard	
Reliability	0.87 AUC filers with $120M to $591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025
Peer failure rate	1.03% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$120M to $591M assets total assets $182.7M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	dilution, thin data not computable: short runway, distress, fortress balance sheet
Inputs computable	5 of 14
Graded from	filings received through Mar 12, 2026 245 days before the rescan; latest periodic filing 10-Q received Nov 5, 2026
Last close	$12.62 2026-11-11; market equity $655.1M; 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 12, 2026

or the "Company") is a Nevada corporation organized in 2024 which is a successor to a Puerto Rican corporation organized in 2019. The Company is engaged in the commercial drone industry, with its principal place of business in Orlando, Florida. In September of 2025, the Company acquired Rotor Lab Pty. Ltd., an Australian company ("Rotor Lab"). components and drones across a diversified brand portfolio through business-to-business ("B2B") sales and a curated retail channel. There is strong brand recognition of the Unusual Machines, Rotor Riot, and Fat Shark brands, particularly in the first person view ("FPV") and small military sub-segments of the drone market.

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 89.9						
Gross profitability	2.1%	28.7%		91.3	552	2025-12-31
Return on invested capital	not computable	11.4%				

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one or more required annual facts are missing						
Accruals ratio	2.0%	(7.3%)		88.6	615	2025-12-31
Gross margin stability, five years	not computable	2.3 pts				
five annual gross margins are required; found 3						
Solvency, sleeve percentile 0.9						
Twelve-month failure probability	not computable	0.06%				
latest liabilities, cash plus short-term investments, book equity, and shares are required						
Altman Z double-prime	27.37	2.21		0.9	562	2025-12-31
Net debt to EBITDA	not computable	1.08x				
one or more required annual facts are missing						
Interest coverage	not computable	3.77x				
interest expense must exceed $100,000						
Current ratio	61.32x	2.01x		0.9	660	2025-12-31
Growth and financing, sleeve percentile 94.8						
Revenue growth, three-year compound	not computable	6.5%				
four annual observations are required; found 3						
Free cash flow growth, three-year compound	not computable	18.0%				
four consecutive annual FCF observations are required; found 3						
Reinvestment rate	not computable	15.1%				
NOPAT must exceed $100,000						
Asset growth, three years	not computable	5.2%				
four annual observations are required; found 3						
Net share issuance, one year	131.1%	0.5%		94.8	406	2026-03-11

Warnings

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

Check	Measured
Dilution	split-adjusted year-over-year share growth is 131.1%
Thin data	5 of 14 grade factors are computable; minimum is 7

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	63.5%	(2.0%)	82
Distance from 52-week high	(62.9%)	(32.9%)	18
EBIT to enterprise value	not computable	1.6%	
Free cash flow yield	(3.5%)	2.7%	20
Book value to price	0.56	0.27	75
Sales to price	0.02	0.31	2
Composite equity issuance, five years	not computable	4.3%	
Relative strength against the sector, log excess return	0.22	(0.29)	82

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	fail
Long-term leverage fell	fail
Current ratio improved	pass

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No new shares issued	fail
Gross margin improved	pass
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	7 (10-Q received Nov 5, 2026)
Median daily dollar volume, 63 sessions	$54.8M

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	$3.9M	2025-12-31	2026-03-12	10-K	26-001730
2	assets	us-gaap:Assets	$182.7M	2025-12-31	2026-03-12	10-K	26-001730
3	net income	us-gaap:NetIncomeLoss	-$19.2M	2025-12-31	2026-03-12	10-K	26-001730
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$21.2M	2025-12-31	2026-03-12	10-K	26-001730
5	assets	us-gaap:Assets	$16.1M	2024-12-31	2026-03-12	10-K	26-001730
6	current assets	us-gaap:AssetsCurrent	$159.5M	2025-12-31	2026-03-12	10-K	26-001730
7	current liabilities	us-gaap:LiabilitiesCurrent	$2.6M	2025-12-31	2026-03-12	10-K	26-001730
8	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$55.1M	2025-12-31	2026-03-12	10-K	26-001730
9	operating income	us-gaap:OperatingIncomeLoss	-$25.2M	2025-12-31	2026-03-12	10-K	26-001730
10	book equity	us-gaap:StockholdersEquity	$174.9M	2025-12-31	2026-03-12	10-K	26-001730
11	liabilities	us-gaap:Liabilities	$7.8M	2025-12-31	2026-03-12	10-K	26-001730
12	interest expense	us-gaap:InterestExpense	$0	2025-12-31	2026-03-12	10-K	26-001730
13	revenue	us-gaap:Revenues	$11.2M	2025-12-31	2026-03-12	10-K	26-001730
14	revenue	us-gaap:Revenues	$5.6M	2024-12-31	2026-03-12	10-K	26-001730
15	revenue	us-gaap:Revenues	$0	2023-12-31	2025-03-27	10-K	25-001929
16	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$2.1M	2025-12-31	2026-03-12	10-K	26-001730
17	depreciation amortization	us-gaap:Depreciation	$27,548	2025-12-31	2026-03-12	10-K	26-001730
18	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$19.2M	2025-12-31	2026-03-12	10-K	26-001730
19	income tax	us-gaap:IncomeTaxExpenseBenefit	-$36,252	2025-12-31	2026-03-12	10-K	26-001730
20	current assets	us-gaap:AssetsCurrent	$6.1M	2024-12-31	2026-03-12	10-K	26-001730
21	current liabilities	us-gaap:LiabilitiesCurrent	$933,669	2024-12-31	2026-03-12	10-K	26-001730
22	assets	us-gaap:Assets	$1.5M	2023-12-31	2025-03-27	10-K	25-001929
23	shares outstanding	dei:EntityCommonStockSharesOutstanding	38,889,911	2026-03-11	2026-03-12	10-K	26-001730
24	shares outstanding	dei:EntityCommonStockSharesOutstanding	16,830,170	2025-03-25	2025-03-27	10-K	25-001929

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