# Omnicell, Inc.

**OMCL**

Nasdaq; business equipment; SIC 3571, Electronic Computers; CIK 0000926326

# D

## fourth fifth of 495 graded peers in business equipment

rank 331 of 495; percentile 66.8; sampling error 2.2 points; lower is stronger

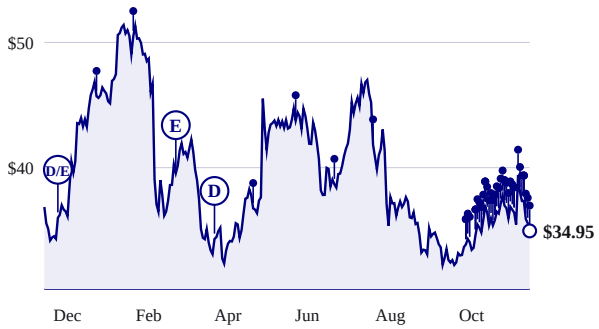
A B C D E

**D, the sloth**



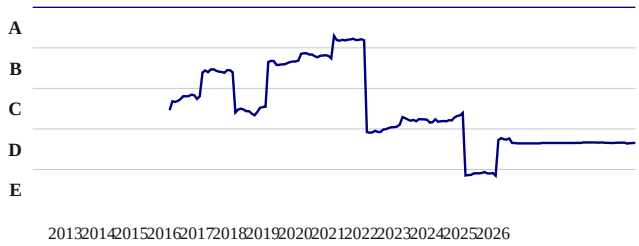
| Scoreboard | |
|---|---|
| **Profitability** | C<br>percentile 55.3 |
| **Solvency** | C<br>percentile 51.2 |
| **Growth and financing** | C<br>percentile 56.6 |
| **Reliability** | 0.91 AUC<br>filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025 |
| **Peer failure rate** | 1.01% a year<br>Item 1.03 bankruptcies, same asset band, 2012 to 2025 |
| **Size band** | $591M to $2.67B assets<br>total assets $2.0B |
| **Standard universe** | inside<br>revenue above $1M and assets above $10M |
| **Warnings** | none triggered; fortress balance sheet<br>not computable: distress |
| **Inputs computable** | 10 of 14 |
| **Graded from** | filings received through Feb 26, 2026<br>260 days before the rescan; latest periodic filing 10-Q received Nov 4, 2026 |
| **Last close** | $34.95<br>2026-11-12; market equity $1.6B; 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 26, 2026*

Omnicell, a leading healthcare technology provider focused on empowering autonomous medication management, is committed to solving the critical challenges inherent in medication management and elevating the role of clinicians within healthcare as an essential component of care delivery. Omnicell is focused on helping its customers define and deliver a cost-effective medication management strategy designed to equip and empower pharmacists and nurses to focus on patient care rather than administrative tasks, and to drive improved clinical, operational, and financial outcomes across all care settings.

## 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 55.3** | | | | | | |
| Gross profitability | 25.5% | 28.8% | | 52.8 | 552 | 2025-12-31 |
| Return on invested capital | not computable | 11.2% | | | | |

*a prior annual debt, equity, and cash observation is required*

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| | | | | | |
|---|---|---|---|---|---|
| Accruals ratio | (6.1%) | (7.3%) | 59.0 | 615 | 2025-12-31 |
| Gross margin stability, five years | 2.5 pts | 2.3 pts | 54.0 | 423 | 2025-12-31 |
| **Solvency, sleeve percentile 51.2** | | | | | |
| Twelve-month failure probability | not computable | 0.05% | | | |
| *latest liabilities, cash plus short-term investments, book equity, and shares are required* | | | | | |
| Altman Z double-prime | 3.07 | 2.21 | 35.8 | 562 | 2025-12-31 |
| Net debt to EBITDA | not computable | 1.09x | | | |
| *latest aligned inputs end 2019-12-31; latest annual assets end 2025-12-31* | | | | | |
| Interest coverage | not computable | 3.77x | | | |
| *interest expense must exceed $100,000* | | | | | |
| Current ratio | 1.43x | 2.01x | 66.6 | 660 | 2025-12-31 |
| **Growth and financing, sleeve percentile 56.6** | | | | | |
| Revenue growth, three-year compound | (2.9%) | 6.5% | 76.1 | 532 | 2025-12-31 |
| Free cash flow growth, three-year compound | 42.2% | 18.0% | 20.5 | 265 | 2025-12-31 |
| Reinvestment rate | (5,854.3%) | 15.1% | 99.5 | 223 | 2025-12-31 |
| Asset growth, three years | (3.7%) | 5.2% | 70.1 | 557 | 2025-12-31 |
| Net share issuance, one year | (2.8%) | 0.5% | 16.5 | 406 | 2026-02-18 |

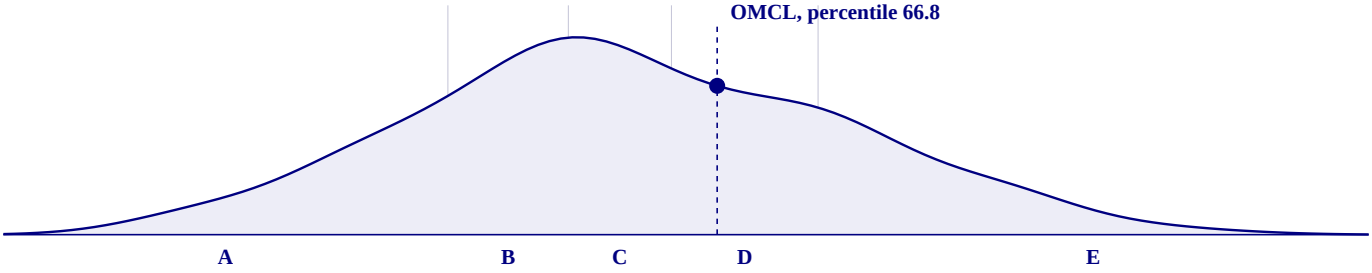
## Warnings

*1 of 7 checks triggered; none of them enters the letter*

| Check | Measured |
|---|---|
| Fortress balance sheet | cash minus debt is 77,210,000 USD; Altman Z is not used |

## Among 495 peers

*business equipment; 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 |
|---|---|---|---|---|
| 326 | Shutterstock, Inc. (SSTK) | 65.8 | D | |
| 327 | Analog Devices Inc. (ADI) | 66.0 | D | |
| 328 | Appian Corp. (APPN) | 66.2 | D | |
| 329 | PubMatic, Inc. (PUBM) | 66.4 | D | |
| 330 | Seer, Inc. (SEER) | 66.6 | D | |
| 331 | Omnicell, Inc. (OMCL) | 66.8 | D | fortress balance sheet |
| 332 | Kaltura Inc. (KLTR) | 67.0 | D | |
| 333 | Franklin Wireless Corp. (FKWL) | 67.2 | D | |
| 334 | Teads Holding Co. (TEAD) | 67.4 | D | distress |
| 335 | Ichor Holdings, Ltd. (ICHR) | 67.6 | D | |
| 336 | HP Inc. (HPQ) | 67.8 | D | |

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## What the price implies

*at the 2026-11-12 close; none of these enters the grade*

| Measure | Value | Peer median | Percentile |
|---|---|---|---|
| Twelve-month price change, skipping the latest month | 1.4% | (2.0%) | 53 |
| Distance from 52-week high | (32.0%) | (33.7%) | 52 |
| EBIT to enterprise value | 0.4% | 1.7% | 39 |
| Free cash flow yield | 5.4% | 2.8% | 72 |
| Book value to price | 0.82 | 0.27 | 83 |
| Sales to price | 0.74 | 0.31 | 71 |
| Composite equity issuance, five years | 6.6% | 4.3% | 53 |
| Relative strength against the sector, log excess return | (0.25) | (0.29) | 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 | pass |
| 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 | pass |
| Asset turnover improved | pass |
| **Cash, filings, liquidity** | |
| Cash and equivalents | $314.9M |
| Operating cash flow, four quarters | $186.2M |
| Months of runway | not finite |
| Days since last periodic filing | 9 (10-Q received Nov 4, 2026) |
| Median daily dollar volume, 63 sessions | $19.1M |

## 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 | $503.4M | 2025-12-31 | 2026-02-26 | 10-K | 26-000006 |
| 2 | assets | us-gaap:Assets | $2.0B | 2025-12-31 | 2026-02-26 | 10-K | 26-000006 |
| 3 | operating income | us-gaap:OperatingIncomeLoss | $78.4M | 2019-12-31 | 2022-02-25 | 10-K | 22-000007 |
| 4 | pretax income | us-gaap:IncomeLossFromContinuingOperationsBeforeInc... | $73.9M | 2019-12-31 | 2022-02-25 | 10-K | 22-000007 |
| 5 | income tax | us-gaap:IncomeTaxExpenseBenefit | $12.6M | 2019-12-31 | 2022-02-25 | 10-K | 22-000007 |
| 6 | total debt | us-gaap:LongTermDebt | $50.0M | 2019-12-31 | 2020-02-26 | 10-K | 20-000010 |
| 7 | book equity | us-gaap:StockholdersEquity | $845.3M | 2019-12-31 | 2023-03-01 | 10-K | 23-000003 |
| 8 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $127.2M | 2019-12-31 | 2022-02-25 | 10-K | 22-000007 |
| 9 | net income | us-gaap:NetIncomeLoss | $2.1M | 2025-12-31 | 2026-02-26 | 10-K | 26-000006 |
| 10 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $127.3M | 2025-12-31 | 2026-02-26 | 10-K | 26-000006 |
| 11 | assets | us-gaap:Assets | $2.1B | 2024-12-31 | 2026-02-26 | 10-K | 26-000006 |
| 12 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $1.2B | 2025-12-31 | 2026-02-26 | 10-K | 26-000006 |
| 13 | gross profit | us-gaap:GrossProfit | $471.0M | 2024-12-31 | 2026-02-26 | 10-K | 26-000006 |
| 14 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $1.1B | 2024-12-31 | 2026-02-26 | 10-K | 26-000006 |
| 15 | gross profit | us-gaap:GrossProfit | $496.8M | 2023-12-31 | 2026-02-26 | 10-K | 26-000006 |
| 16 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $1.1B | 2023-12-31 | 2026-02-26 | 10-K | 26-000006 |
| 17 | gross profit | us-gaap:GrossProfit | $589.0M | 2022-12-31 | 2025-02-27 | 10-K | 25-000003 |
| 18 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $1.3B | 2022-12-31 | 2025-02-27 | 10-K | 25-000003 |

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| | | | | | | | |
|---|---|---|---|---|---|---|---|
| 19 | gross profit | us-gaap:GrossProfit | $554.7M | 2021-12-31 | 2024-02-28 | 10-K | 24-000008 |
| 20 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $1.1B | 2021-12-31 | 2024-02-28 | 10-K | 24-000008 |
| 21 | current assets | us-gaap:AssetsCurrent | $680.1M | 2025-12-31 | 2026-02-26 | 10-K | 26-000006 |
| 22 | current liabilities | us-gaap:LiabilitiesCurrent | $476.6M | 2025-12-31 | 2026-02-26 | 10-K | 26-000006 |
| 23 | retained earnings | us-gaap:RetainedEarningsAccumulatedDeficit | $384.9M | 2025-12-31 | 2026-02-26 | 10-K | 26-000006 |
| 24 | operating income | us-gaap:OperatingIncomeLoss | $5.2M | 2025-12-31 | 2026-02-26 | 10-K | 26-000006 |
| 25 | book equity | us-gaap:StockholdersEquity | $1.2B | 2025-12-31 | 2026-02-26 | 10-K | 26-000006 |
| 26 | liabilities | us-gaap:Liabilities | $742.9M | 2025-12-31 | 2026-02-26 | 10-K | 26-000006 |
| 27 | depreciation amortization | us-gaap:DepreciationDepletionAndAmortization | $53.6M | 2019-12-31 | 2022-02-25 | 10-K | 22-000007 |
| 28 | operating income | us-gaap:OperatingIncomeLoss | $16.2M | 2011-12-31 | 2014-03-17 | 10-K | 14-000005 |
| 29 | interest expense | us-gaap:InterestExpense | $62,000 | 2011-12-31 | 2012-03-08 | 10-K | 12-002283 |
| 30 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $40.4M | 2025-12-31 | 2026-02-26 | 10-K | 26-000006 |
| 31 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $187.7M | 2024-12-31 | 2026-02-26 | 10-K | 26-000006 |
| 32 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $36.5M | 2024-12-31 | 2026-02-26 | 10-K | 26-000006 |
| 33 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $181.1M | 2023-12-31 | 2026-02-26 | 10-K | 26-000006 |
| 34 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $41.5M | 2023-12-31 | 2026-02-26 | 10-K | 26-000006 |
| 35 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $77.8M | 2022-12-31 | 2025-02-27 | 10-K | 25-000003 |
| 36 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $47.5M | 2022-12-31 | 2025-02-27 | 10-K | 25-000003 |
| 37 | depreciation amortization | us-gaap:DepreciationDepletionAndAmortization | $78.8M | 2025-12-31 | 2026-02-26 | 10-K | 26-000006 |
| 38 | pretax income | us-gaap:IncomeLossFromContinuingOperationsBeforeInc... | $11.3M | 2025-12-31 | 2026-02-26 | 10-K | 26-000006 |
| 39 | income tax | us-gaap:IncomeTaxExpenseBenefit | $9.3M | 2025-12-31 | 2026-02-26 | 10-K | 26-000006 |
| 40 | current assets | us-gaap:AssetsCurrent | $815.5M | 2024-12-31 | 2026-02-26 | 10-K | 26-000006 |
| 41 | current liabilities | us-gaap:LiabilitiesCurrent | $595.7M | 2024-12-31 | 2026-02-26 | 10-K | 26-000006 |
| 42 | assets | us-gaap:Assets | $2.2B | 2023-12-31 | 2025-02-27 | 10-K | 25-000003 |
| 43 | assets | us-gaap:Assets | $2.2B | 2022-12-31 | 2024-02-28 | 10-K | 24-000008 |
| 44 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 45,435,918 | 2026-02-18 | 2026-02-26 | 10-K | 26-000006 |
| 45 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 46,759,414 | 2025-02-19 | 2025-02-27 | 10-K | 25-000003 |

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