Rank One Computing Corp.

ROC

Nasdaq; business equipment; SIC 7372, Services-Prepackaged Software; CIK 0002077709

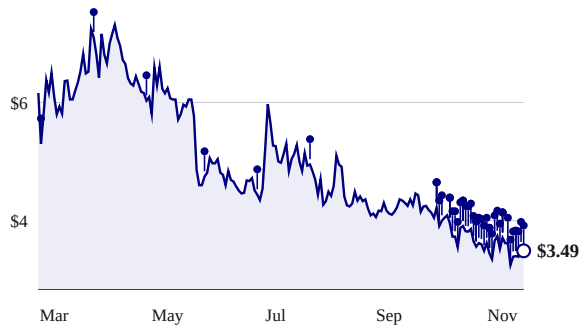
None

No letter

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

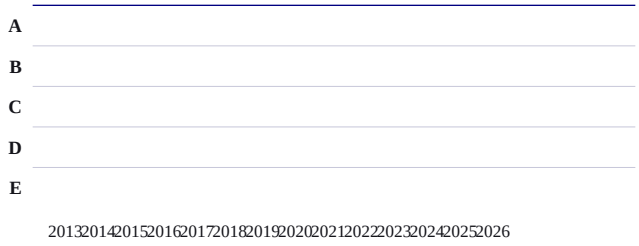
Scoreboard	
Reliability	0.76 AUC filers with under $12.5M assets; 95% interval 0.65 to 0.86; 63 events, 2020 to 2025
Peer failure rate	0.60% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	under $12.5M assets total assets $7.0M
Standard universe	outside revenue above $1M and assets above $10M
Warnings	thin data not computable: dilution, short runway, distress, fortress balance sheet
Inputs computable	3 of 14
Graded from	filings received through Mar 31, 2026 227 days before the rescan; latest periodic filing 10-Q received Aug 13, 2026
Last close	$3.73 2026-11-04; market equity $71.1M; 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 31, 2026

("AI") company redefining the global standard for Vision AI in identity, security, and digital forensics. Our Vision AI platform delivers real-time facial recognition, multimodal biometric verification, video analytics, and AI-powered evidence analysis to mission-critical organizations across private and public sectors. ROC's biometric algorithms are routinely ranked by National Institute of Standards and Technology ("NIST") as among the most accurate and computationally efficient globally. Our solutions outperform legacy foreign-built systems at a fraction of the cost, with faster deployment and stronger trust.

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 0.4						
Gross profitability	188.2%	28.8%		0.4	552	2025-12-31
Return on invested capital	not computable	11.2%				
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	not computable	(7.3%)			
a prior annual assets observation is required					
Gross margin stability, five years	not computable	2.3 pts			
five annual gross margins are required; found 1					
Solvency, sleeve percentile 82.8					
Twelve-month failure probability	not computable	0.05%			
four consecutive discrete net-income quarters are required; found 2					
Altman Z double-prime	(5.53)	2.21	77.0	562	2025-12-31
Net debt to EBITDA	not computable	1.09x			
one or more required annual facts are missing					
Interest coverage	not computable	3.77x			
one or more required annual facts are missing					
Current ratio	0.77x	2.01x	88.6	660	2025-12-31
Growth and financing					
Revenue growth, three-year compound	not computable	6.5%			
four annual observations are required; found 1					
Free cash flow growth, three-year compound	not computable	18.0%			
four consecutive annual FCF observations are required; found 0					
Reinvestment rate	not computable	15.1%			
one or more required annual facts are missing					
Asset growth, three years	not computable	5.2%			
four annual observations are required; found 1					
Net share issuance, one year	not computable	0.5%			
two annual share counts are required; found 1					

Warnings

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

Check	Measured
Thin data	3 of 14 grade factors are computable; minimum is 7

What the price implies

at the 2026-11-04 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	not computable	(2.0%)	
Distance from 52-week high	(67.0%)	(33.7%)	16
EBIT to enterprise value	not computable	1.7%	
Free cash flow yield	not computable	2.8%	
Book value to price	0.27	0.27	50
Sales to price	0.25	0.31	45
Composite equity issuance, five years	not computable	4.3%	
Relative strength against the sector, log excess return	not computable	(0.29)	

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	fail
Operating cash flow exceeds net income	pass
Long-term leverage fell	fail
Current ratio improved	fail

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No new shares issued	fail
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	92 (10-Q received Aug 13, 2026)
Median daily dollar volume, 63 sessions	$80,167

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	$13.1M	2025-12-31	2026-03-31	10-K	26-037484
2	assets	us-gaap:Assets	$7.0M	2025-12-31	2026-03-31	10-K	26-037484
3	net income	us-gaap:NetIncomeLoss	-$2.7M	2025-12-31	2026-03-31	10-K	26-037484
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$997,670	2025-12-31	2026-03-31	10-K	26-037484
5	current assets	us-gaap:AssetsCurrent	$4.9M	2025-12-31	2026-03-31	10-K	26-037484
6	current liabilities	us-gaap:LiabilitiesCurrent	$6.3M	2025-12-31	2026-03-31	10-K	26-037484
7	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$4.7M	2025-12-31	2026-03-31	10-K	26-037484
8	operating income	us-gaap:OperatingIncomeLoss	-$2.0M	2025-12-31	2026-03-31	10-K	26-037484
9	book equity	us-gaap:StockholdersEquity	-$292,271	2025-12-31	2026-03-31	10-K	26-037484
10	liabilities	us-gaap:Liabilities	$7.3M	2025-12-31	2026-03-31	10-K	26-037484
11	revenue	us-gaap:Revenues	$17.0M	2025-12-31	2026-03-31	10-K	26-037484
12	shares outstanding	dei:EntityCommonStockSharesOutstanding	19,080,127	2026-03-27	2026-03-31	10-K	26-037484

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