Xometry, Inc.

XMTR

Nasdaq; other; SIC 7389, Services-Business Services, NEC; CIK 0001657573

B

second fifth of 335 graded peers in other

rank 115 of 335; percentile 34.1; sampling error 2.6 points; lower is stronger

A B C D E

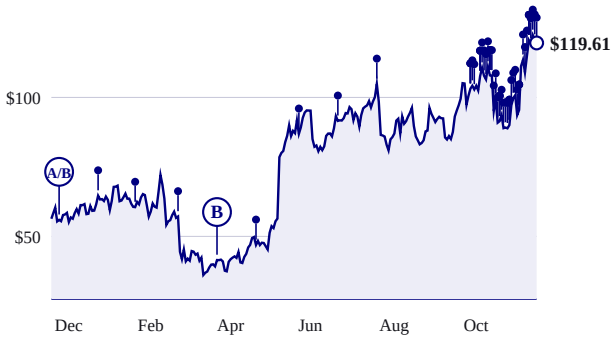
B, the elk



Scoreboard

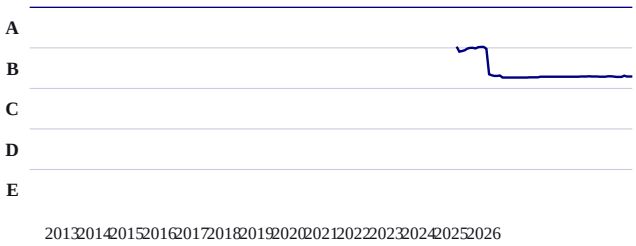
Profitability	C percentile 42.7
Solvency	B percentile 33.8
Growth and financing	C percentile 51.9
Reliability	0.91 AUC filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025
Peer failure rate	1.01% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$591M to $2.67B assets total assets $703.7M
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 Feb 24, 2026 265 days before the rescan; latest periodic filing 10-Q received Nov 3, 2026
Last close	$119.67 2026-11-13; market equity $5.5B; 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 24, 2026

Xometry, Inc. ("Xometry", the "Company", "our", or "we") was founded in 2013 with the mission to make the world's manufacturing capacity accessible to all. Xometry's Artificial Intelligence ("AI") native marketplace that is digitizing how custom manufacturing is priced, sourced and fulfilled globally. Xometry is an AI-native global online manufacturing marketplace with a suite of services that are rapidly digitizing the custom manufacturing industry. Xometry's marketplace enables the design-to-production workflow by providing the AI-driven execution layer that translates design intent into intelligent sourcing decisions and production outcomes at scale.

The fourteen inputs

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

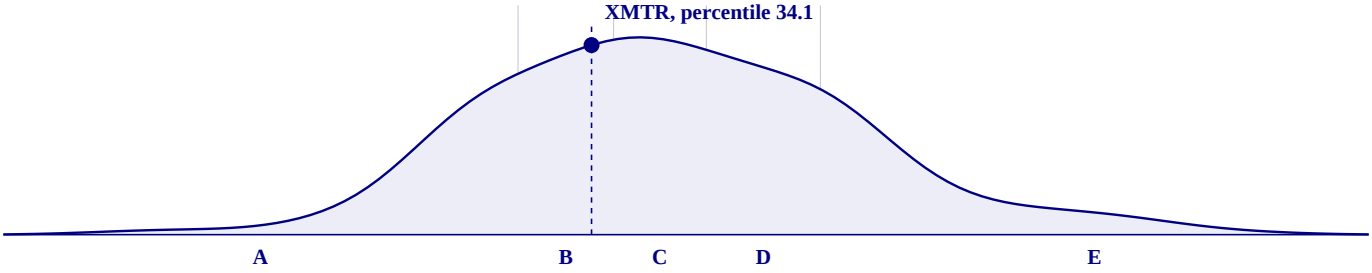
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 42.7						
Gross profitability	38.2%	27.1%		27.7	286	2025-12-31
Return on invested capital	not computable	10.0%				

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one or more required annual facts are missing					
Accruals ratio	(9.8%)	(5.8%)	26.9	502	2025-12-31
Gross margin stability, five years	5.1 pts	2.2 pts	73.4	204	2025-12-31
Solvency, sleeve percentile 33.8					
Twelve-month failure probability	not computable	0.04%			
liabilities and a nearby cover-page share count are required at 2026-09-30					
Altman Z double-prime	0.53	2.06	56.4	389	2025-12-31
Net debt to EBITDA	not computable	2.51x			
one or more required annual facts are missing					
Interest coverage	not computable	2.45x			
latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31					
Current ratio	3.76x	1.33x	11.1	506	2025-12-31
Growth and financing, sleeve percentile 51.9					
Revenue growth, three-year compound	21.7%	5.0%	12.4	397	2025-12-31
Free cash flow growth, three-year compound	not computable	8.8%			
current FCF must be positive and base FCF must exceed $100,000					
Reinvestment rate	not computable	12.2%			
pretax income must exceed the validity floor and imply a 0%-100% tax rate					
Asset growth, three years	(1.4%)	4.0%	72.3	430	2025-12-31
Net share issuance, one year	2.1%	(0.5%)	70.9	352	2023-03-09

Among 335 peers

other; 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
110	Verra Mobility Corp. (VRRM)	32.6	B	
111	Limbach Holdings, Inc. (LMB)	32.9	B	
112	Paysign, Inc. (PAYS)	33.2	B	
113	Datavault AI Inc. (DVLT)	33.5	B	dilution, short runway, late filer, fortress balance sheet
114	Fedex Corp. (FDX)	33.8	B	
115	Xometry, Inc. (XMTR)	34.1	B	
116	Astrana Health, Inc. (ASTH)	34.4	B	late filer
117	Evolent Health, Inc. (EVH)	34.7	B	
118	United Rentals, Inc. (URI)	35.0	B	
119	Sterling Infrastructure, Inc. (STRL)	35.3	B	
120	Energy Fuels Inc. (UUUU)	35.6	B	

What the price implies

at the 2026-11-13 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	111.2%	(1.5%)	96
Distance from 52-week high	(2.3%)	(23.3%)	91
EBIT to enterprise value	not computable	4.3%	
Free cash flow yield	(0.4%)	4.1%	23
Book value to price	0.11	0.34	19
Sales to price	0.12	0.69	5
Composite equity issuance, five years	not computable	(8.9%)	
Relative strength against the sector, log excess return	0.63	(0.14)	96

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	fail
No new shares issued	fail
Gross margin improved	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$18.1M
Operating cash flow, four quarters	$29.8M
Months of runway	not finite
Days since last periodic filing	13 (10-Q received Nov 3, 2026)
Median daily dollar volume, 63 sessions	$69.0M

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	$268.8M	2025-12-31	2026-02-24	10-K	26-066959
2	assets	us-gaap:Assets	$703.7M	2025-12-31	2026-02-24	10-K	26-066959
3	net income	us-gaap:ProfitLoss	-$61.7M	2025-12-31	2026-02-24	10-K	26-066959
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$6.1M	2025-12-31	2026-02-24	10-K	26-066959
5	assets	us-gaap:Assets	$680.1M	2024-12-31	2026-02-24	10-K	26-066959
6	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$686.6M	2025-12-31	2026-02-24	10-K	26-066959
7	gross profit	us-gaap:GrossProfit	$215.6M	2024-12-31	2026-02-24	10-K	26-066959
8	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$545.5M	2024-12-31	2026-02-24	10-K	26-066959
9	gross profit	us-gaap:GrossProfit	$178.3M	2023-12-31	2026-02-24	10-K	26-066959
10	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$463.4M	2023-12-31	2026-02-24	10-K	26-066959
11	gross profit	us-gaap:GrossProfit	$146.0M	2022-12-31	2025-02-25	10-K	25-026655
12	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$380.9M	2022-12-31	2025-02-25	10-K	25-026655
13	gross profit	us-gaap:GrossProfit	$57.1M	2021-12-31	2024-02-29	10-K	24-023214
14	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$218.3M	2021-12-31	2024-02-29	10-K	24-023214
15	current assets	us-gaap:AssetsCurrent	$334.6M	2025-12-31	2026-02-24	10-K	26-066959
16	current liabilities	us-gaap:LiabilitiesCurrent	$88.9M	2025-12-31	2026-02-24	10-K	26-066959
17	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$432.0M	2025-12-31	2026-02-24	10-K	26-066959
18	operating income	us-gaap:OperatingIncomeLoss	-$45.5M	2025-12-31	2026-02-24	10-K	26-066959

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19	book equity	us-gaap:StockholdersEquity	$275.6M	2025-12-31	2026-02-24	10-K	26-066959
20	liabilities	us-gaap:Liabilities	$427.0M	2025-12-31	2026-02-24	10-K	26-066959
21	operating income	us-gaap:OperatingIncomeLoss	-$73.6M	2023-12-31	2026-02-24	10-K	26-066959
22	interest expense	us-gaap:InterestExpense	$4.8M	2023-12-31	2024-02-29	10-K	24-023214
23	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$30.2M	2025-12-31	2026-02-24	10-K	26-066959
24	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$15.4M	2024-12-31	2026-02-24	10-K	26-066959
25	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$18.1M	2024-12-31	2026-02-24	10-K	26-066959
26	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$29.9M	2023-12-31	2026-02-24	10-K	26-066959
27	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$18.5M	2023-12-31	2026-02-24	10-K	26-066959
28	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$62.6M	2022-12-31	2025-02-25	10-K	25-026655
29	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$13.7M	2022-12-31	2025-02-25	10-K	25-026655
30	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$18.8M	2025-12-31	2026-02-24	10-K	26-066959
31	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$61.2M	2025-12-31	2026-02-24	10-K	26-066959
32	income tax	us-gaap:IncomeTaxExpenseBenefit	$589,000	2025-12-31	2026-02-24	10-K	26-066959
33	current assets	us-gaap:AssetsCurrent	$327.5M	2024-12-31	2026-02-24	10-K	26-066959
34	current liabilities	us-gaap:LiabilitiesCurrent	$74.8M	2024-12-31	2026-02-24	10-K	26-066959
35	assets	us-gaap:Assets	$707.4M	2023-12-31	2025-02-25	10-K	25-026655
36	assets	us-gaap:Assets	$734.1M	2022-12-31	2024-02-29	10-K	24-023214
37	shares outstanding	dei:EntityCommonStockSharesOutstanding	45,070,484	2023-03-09	2023-03-16	10-K	23-008494
38	shares outstanding	dei:EntityCommonStockSharesOutstanding	44,160,216	2022-03-07	2022-03-18	10-K	22-004158

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