Ideaya Biosciences, Inc.

IDYA

Nasdaq; healthcare; SIC 2834, Pharmaceutical Preparations; CIK 0001676725

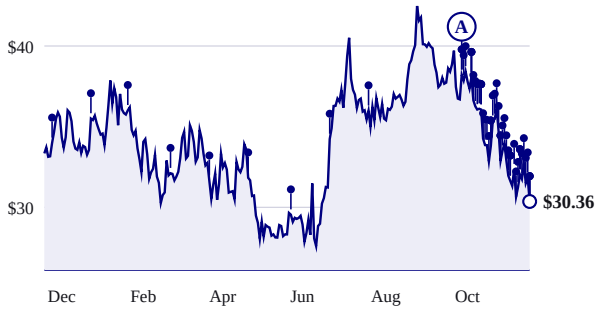
None

No letter

6 of 13 inputs computable; 7 are required, with a score in every sleeve

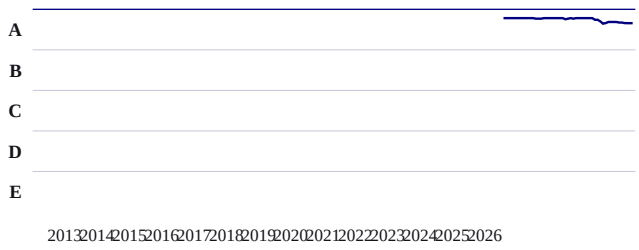
Scoreboard	
Reliability	0.91 AUC filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025
Peer failure rate	1.01% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$591M to $2.67B assets total assets $1.1B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	thin data not computable: fortress balance sheet
Inputs computable	6 of 13
Graded from	filings received through Feb 17, 2026 273 days before the rescan; latest periodic filing 10-Q received Nov 3, 2026
Last close	$30.35 2026-11-16; market equity $2.9B; 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 17, 2026

We are a precision medicine oncology company committed to the discovery, development, and commercialization of transformative therapies for cancer. Our approach integrates expertise in small-molecule drug discovery, structural biology and bioinformatics with robust internal capabilities in identifying and validating translational biomarkers to develop tailored, potentially first-in-class targeted therapies aligned to the genetic drivers of disease. We have built a deep pipeline of product candidates focused on synthetic lethality and antibody-drug conjugates (ADCs) for molecularly defined solid tumor indications.

The thirteen 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 67.3						
Gross profitability	not computable	32.8%				
one or more required annual facts are missing						
Return on invested capital	not computable	9.6%				

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one or more required annual facts are missing					
Accruals ratio	(3.8%)	(6.7%)	67.3	756	2025-12-31
Gross margin stability, five years	not computable	2.8 pts			
five annual gross margins are required; found 0					
Solvency, sleeve percentile 10.5					
Altman Z double-prime	12.90	0.31	6.8	705	2025-12-31
Net debt to EBITDA	not computable	1.82x			
one or more required annual facts are missing					
Interest coverage	not computable	(3.61x)			
one or more required annual facts are missing					
Current ratio	11.34x	2.68x	14.1	781	2025-12-31
Growth and financing, sleeve percentile 11.4					
Revenue growth, three-year compound	62.5%	9.6%	9.0	400	2025-12-31
Free cash flow growth, three-year compound	not computable	11.1%			
current FCF must be positive and base FCF must exceed $100,000					
Reinvestment rate	not computable	33.9%			
one or more required annual facts are missing					
Asset growth, three years	41.9%	3.2%	9.5	663	2025-12-31
Net share issuance, one year	0.3%	1.6%	15.7	624	2026-02-13

Warnings

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

Check	Measured
Thin data	6 of 13 grade factors are computable; minimum is 7

What the price implies

at the 2026-11-16 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	20.6%	(1.7%)	63
Distance from 52-week high	(28.5%)	(31.5%)	52
EBIT to enterprise value	not computable	0.5%	
Free cash flow yield	(2.5%)	0.5%	38
Book value to price	0.37	0.28	59
Sales to price	0.07	0.36	15
Composite equity issuance, five years	109.8%	13.2%	84
Relative strength against the sector, log excess return	0.02	(0.19)	63
Twelve-month failure probability, CHS model	0.04%	0.06%	38

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	pass
Long-term leverage fell	fail
Current ratio improved	fail
No new shares issued	fail
Gross margin improved	fail
Asset turnover improved	pass

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Cash, filings, liquidity	
Cash and equivalents	$261.5M
Operating cash flow, four quarters	-$347.4M
Months of runway	9.0
Days since last periodic filing	14 (10-Q received Nov 3, 2026)
Median daily dollar volume, 63 sessions	$29.3M

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	net income	us-gaap:NetIncomeLoss	-$113.7M	2025-12-31	2026-02-17	10-K	26-054533
2	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$71.1M	2025-12-31	2026-02-17	10-K	26-054533
3	assets	us-gaap:Assets	$1.1B	2025-12-31	2026-02-17	10-K	26-054533
4	assets	us-gaap:Assets	$1.1B	2024-12-31	2026-02-17	10-K	26-054533
5	current assets	us-gaap:AssetsCurrent	$666.7M	2025-12-31	2026-02-17	10-K	26-054533
6	current liabilities	us-gaap:LiabilitiesCurrent	$58.8M	2025-12-31	2026-02-17	10-K	26-054533
7	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$736.5M	2025-12-31	2026-02-17	10-K	26-054533
8	operating income	us-gaap:OperatingIncomeLoss	-$159.3M	2025-12-31	2026-02-17	10-K	26-054533
9	book equity	us-gaap:StockholdersEquity	$1.0B	2025-12-31	2026-02-17	10-K	26-054533
10	liabilities	us-gaap:Liabilities	$86.4M	2025-12-31	2026-02-17	10-K	26-054533
11	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$218.7M	2025-12-31	2026-02-17	10-K	26-054533
12	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$7.0M	2024-12-31	2026-02-17	10-K	26-054533
13	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$23.4M	2023-12-31	2026-02-17	10-K	26-054533
14	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$50.9M	2022-12-31	2025-02-18	10-K	25-022183
15	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$2.4M	2025-12-31	2026-02-17	10-K	26-054533
16	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$247.6M	2024-12-31	2026-02-17	10-K	26-054533
17	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$3.9M	2024-12-31	2026-02-17	10-K	26-054533
18	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$115.2M	2023-12-31	2026-02-17	10-K	26-054533
19	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$2.4M	2023-12-31	2026-02-17	10-K	26-054533
20	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$87.2M	2022-12-31	2025-02-18	10-K	25-022183
21	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$3.4M	2022-12-31	2025-02-18	10-K	25-022183
22	assets	us-gaap:Assets	$649.3M	2023-12-31	2025-02-18	10-K	25-022183
23	assets	us-gaap:Assets	$388.0M	2022-12-31	2024-02-20	10-K	24-017093
24	shares outstanding	dei:EntityCommonStockSharesOutstanding	87,814,027	2026-02-13	2026-02-17	10-K	26-054533
25	shares outstanding	dei:EntityCommonStockSharesOutstanding	87,537,391	2025-02-14	2025-02-18	10-K	25-022183

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