# Nexentis Technologies Inc.

**NXTS**

Nasdaq; healthcare; SIC 2834, Pharmaceutical Preparations; CIK 0001789192

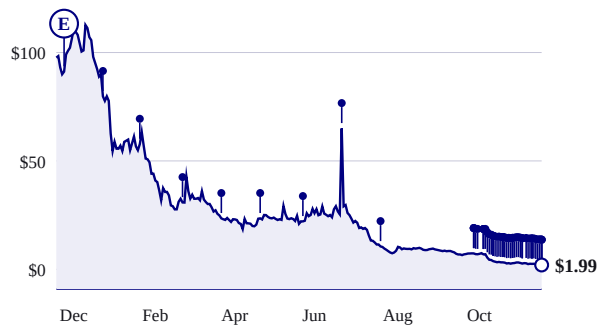
# None

**No letter**

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

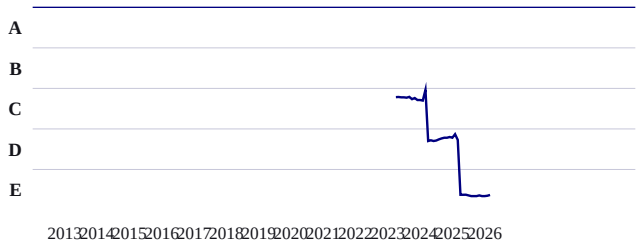
| Scoreboard | |
|---|---|
| **Reliability** | 0.83 AUC<br>filers with $12.5M to $120M assets; 95% interval 0.79 to 0.86; 201 events, 2020 to 2025 |
| **Peer failure rate** | 1.07% a year<br>Item 1.03 bankruptcies, same asset band, 2012 to 2025 |
| **Size band** | $12.5M to $120M assets<br>total assets $20.4M |
| **Standard universe** | outside<br>revenue above $1M and assets above $10M |
| **Warnings** | dilution, thin data; fortress balance sh... |
| **Inputs computable** | 5 of 13 |
| **Graded from** | filings received through Mar 31, 2026<br>231 days before the rescan; latest periodic filing 10-Q received Nov 16, 2026 |
| **Last close** | $2.03<br>2026-11-16; market equity $1.4M; 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*

were incorporated in the State of Delaware on April 1, 2009 under the name Pimi Agro Cleantech, Inc. On April 11, 2016, we changed our name from Pimi Agro Cleantech, Inc. to Save Foods, Inc., on March 19, 2024 we changed our name to N2OFF, Inc., and on February 26, 2026, we changed our name to Nexentis Technologies Inc.

## 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 78.1** | | | | | | |
| Gross profitability | not computable | 32.8% | | | | |
| *latest aligned inputs end 2024-12-31; latest annual assets end 2025-12-31* | | | | | | |
| Return on invested capital | not computable | 9.6% | | | | |
| *required facts have no common fiscal period end* | | | | | | |
| Accruals ratio | (1.5%) | (6.7%) | | 78.1 | 756 | 2025-12-31 |

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| | | | | | | |
|---|---|---|---|---|---|---|
| Gross margin stability, five years | not computable | 2.8 pts | | | | |
| *latest aligned inputs end 2024-12-31; latest annual assets end 2025-12-31* | | | | | | |
| **Solvency, sleeve percentile 46.7** | | | | | | |
| Altman Z double-prime | (2.48) | 0.31 | | 48.7 | 705 | 2025-12-31 |
| Net debt to EBITDA | not computable | 1.82x | | | | |
| *EBITDA must exceed $100,000* | | | | | | |
| Interest coverage | not computable | (3.61x) | | | | |
| *interest expense must exceed $100,000* | | | | | | |
| Current ratio | 4.19x | 2.68x | | 44.7 | 781 | 2025-12-31 |
| **Growth and financing, sleeve percentile 52.4** | | | | | | |
| Revenue growth, three-year compound | not computable | 9.6% | | | | |
| *latest aligned inputs end 2024-12-31; latest annual assets end 2025-12-31* | | | | | | |
| Free cash flow growth, three-year compound | not computable | 11.1% | | | | |
| *four consecutive annual FCF observations are required; found 4* | | | | | | |
| Reinvestment rate | not computable | 33.9% | | | | |
| *NOPAT must exceed $100,000* | | | | | | |
| Asset growth, three years | 46.5% | 3.2% | | 8.5 | 663 | 2025-12-31 |
| Net share issuance, one year | 904.3% | 1.6% | | 96.3 | 624 | 2026-03-31 |

## Warnings

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

| Check | Measured |
|---|---|
| Dilution | split-adjusted year-over-year share growth is 904.3% |
| Thin data | 5 of 13 grade factors are computable; minimum is 7 |
| Fortress balance sheet | cash minus debt is 6,742,548 USD; Altman Z is not used |

## 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 | (94.1%) | (1.7%) | 1 |
| Distance from 52-week high | (98.2%) | (31.5%) | 1 |
| EBIT to enterprise value | not computable | 0.5% | |
| Free cash flow yield | (288.1%) | 0.5% | 2 |
| Book value to price | 9.73 | 0.28 | 99 |
| Sales to price | 0.16 | 0.36 | 28 |
| Composite equity issuance, five years | not computable | 13.2% | |
| Relative strength against the sector, log excess return | (3.01) | (0.19) | 1 |
| Twelve-month failure probability, CHS model | 0.09% | 0.06% | 58 |

## 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 | pass |
| No new shares issued | fail |
| Gross margin improved | fail |
| Asset turnover improved | fail |

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| Cash, filings, liquidity | |
|---|---|
| Cash and equivalents | $2.8M |
| Operating cash flow, four quarters | -$4.7M |
| Months of runway | 7.3 |
| Days since last periodic filing | 1 (10-Q received Nov 16, 2026) |
| Median daily dollar volume, 63 sessions | $31,715 |

## 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 | $45,000 | 2024-12-31 | 2025-03-31 | 10-K | 25-001513 |
| 2 | assets | us-gaap:Assets | $5.5M | 2024-12-31 | 2026-03-31 | 10-K | 26-014183 |
| 3 | net income | us-gaap:NetIncomeLoss | -$4.0M | 2025-12-31 | 2026-03-31 | 10-K | 26-014183 |
| 4 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | -$3.8M | 2025-12-31 | 2026-03-31 | 10-K | 26-014183 |
| 5 | assets | us-gaap:Assets | $20.4M | 2025-12-31 | 2026-03-31 | 10-K | 26-014183 |
| 6 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $210,000 | 2024-12-31 | 2025-03-31 | 10-K | 25-001513 |
| 7 | gross profit | us-gaap:GrossProfit | $208,000 | 2023-12-31 | 2025-03-31 | 10-K | 25-001513 |
| 8 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $263,000 | 2023-12-31 | 2025-03-31 | 10-K | 25-001513 |
| 9 | gross profit | us-gaap:GrossProfit | $235,691 | 2022-12-31 | 2024-04-01 | 10-K | 24-012356 |
| 10 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $394,004 | 2022-12-31 | 2024-04-01 | 10-K | 24-012356 |
| 11 | gross profit | us-gaap:GrossProfit | $302,198 | 2021-12-31 | 2023-03-27 | 10-K | 23-009116 |
| 12 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $438,141 | 2021-12-31 | 2023-03-27 | 10-K | 23-009116 |
| 13 | gross profit | us-gaap:GrossProfit | $188,869 | 2020-12-31 | 2022-03-31 | 10-K | 22-008526 |
| 14 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $232,274 | 2020-12-31 | 2022-03-31 | 10-K | 22-008526 |
| 15 | current assets | us-gaap:AssetsCurrent | $6.0M | 2025-12-31 | 2026-03-31 | 10-K | 26-014183 |
| 16 | current liabilities | us-gaap:LiabilitiesCurrent | $1.4M | 2025-12-31 | 2026-03-31 | 10-K | 26-014183 |
| 17 | retained earnings | us-gaap:RetainedEarningsAccumulatedDeficit | -$38.6M | 2025-12-31 | 2026-03-31 | 10-K | 26-014183 |
| 18 | operating income | us-gaap:OperatingIncomeLoss | -$4.2M | 2025-12-31 | 2026-03-31 | 10-K | 26-014183 |
| 19 | book equity | us-gaap:StockholdersEquity | $16.0M | 2025-12-31 | 2026-03-31 | 10-K | 26-014183 |
| 20 | liabilities | us-gaap:Liabilities | $4.7M | 2025-12-31 | 2026-03-31 | 10-K | 26-014183 |
| 21 | total debt | us-gaap:LongTermDebt | $8,390 | 2021-12-31 | 2022-03-31 | 10-K | 22-008526 |
| 22 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $6.8M | 2021-12-31 | 2023-03-27 | 10-K | 23-009116 |
| 23 | operating income | us-gaap:OperatingIncomeLoss | -$4.7M | 2021-12-31 | 2023-03-27 | 10-K | 23-009116 |
| 24 | depreciation amortization | us-gaap:DepreciationDepletionAndAmortization | $57,195 | 2021-12-31 | 2022-03-31 | 10-K | 22-008526 |
| 25 | operating income | us-gaap:OperatingIncomeLoss | -$3.3M | 2024-12-31 | 2026-03-31 | 10-K | 26-014183 |
| 26 | interest expense | us-gaap:InterestExpense | $16 | 2024-12-31 | 2025-03-31 | 10-K | 25-001513 |
| 27 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $14,000 | 2025-12-31 | 2026-03-31 | 10-K | 26-014183 |
| 28 | depreciation amortization | us-gaap:DepreciationDepletionAndAmortization | $71,000 | 2025-12-31 | 2026-03-31 | 10-K | 26-014183 |
| 29 | pretax income | us-gaap:IncomeLossFromContinuingOperationsBeforeInc... | -$3.6M | 2025-12-31 | 2026-03-31 | 10-K | 26-014183 |
| 30 | income tax | us-gaap:IncomeTaxExpenseBenefit | -$18,000 | 2025-12-31 | 2026-03-31 | 10-K | 26-014183 |
| 31 | current assets | us-gaap:AssetsCurrent | $3.5M | 2024-12-31 | 2026-03-31 | 10-K | 26-014183 |
| 32 | current liabilities | us-gaap:LiabilitiesCurrent | $892,000 | 2024-12-31 | 2026-03-31 | 10-K | 26-014183 |
| 33 | assets | us-gaap:Assets | $7.2M | 2023-12-31 | 2025-03-31 | 10-K | 25-001513 |
| 34 | assets | us-gaap:Assets | $6.5M | 2022-12-31 | 2024-04-01 | 10-K | 24-012356 |
| 35 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 5,111,362 | 2026-03-31 | 2026-03-31 | 10-K | 26-014183 |
| 36 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 17,812,404 | 2025-03-31 | 2025-03-31 | 10-K | 25-001513 |

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