Capricor Therapeutics, Inc.

CAPR

Nasdaq; healthcare; SIC 2834, Pharmaceutical Preparations; CIK 0001133869

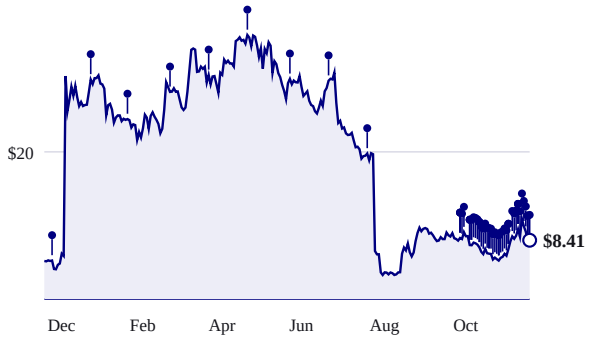
None

No letter

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

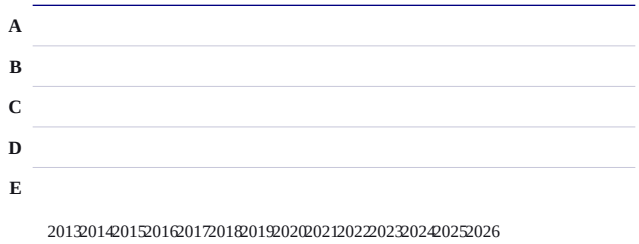
Scoreboard	
Reliability	0.87 AUC filers with $120M to $591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025
Peer failure rate	1.03% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$120M to $591M assets total assets $355.9M
Standard universe	outside revenue above $1M and assets above $10M
Warnings	dilution, short runway, thin data, dege... not computable: distress, fortress balance sheet
Inputs computable	5 of 13
Graded from	filings received through Mar 17, 2026 246 days before the rescan; latest periodic filing 10-Q received Nov 10, 2026
Last close	$8.41 2026-11-17; market equity $489.0M; 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 17, 2026

Capricor Therapeutics, Inc. is a biotechnology company focused on the development and potential commercialization of cell and exosome-based therapeutics for the treatment of Duchenne muscular dystrophy ("DMD"), a rare genetic disorder characterized by progressive muscle degeneration and premature death, as well as other diseases with significant unmet medical need.

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 31.9						
Gross profitability	not computable	32.8%				
one or more required annual facts are missing						
Return on invested capital	not computable	9.6%				
one or more required annual facts are missing						
Accruals ratio	(13.4%)	(6.7%)		31.9	756	2025-12-31

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.

Gross margin stability, five years	not computable	2.8 pts				
five annual gross margins are required; found 0						
Solvency, sleeve percentile 17.4						
Altman Z double-prime	6.86	0.31		15.1	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)				
interest expense must exceed $100,000						
Current ratio	9.01x	2.68x		19.7	781	2025-12-31
Growth and financing, sleeve percentile 34.1						
Revenue growth, three-year compound	not computable	9.6%				
current value must be positive and the base must exceed $100,000						
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%				
pretax income must exceed the validity floor and imply a 0%-100% tax rate						
Asset growth, three years	92.2%	3.2%		2.7	663	2025-12-31
Net share issuance, one year	25.9%	1.6%		65.5	625	2026-03-16

Warnings

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

Check	Measured
Dilution	split-adjusted year-over-year share growth is 25.9%
Short runway	cash runway is 4.4 months
Thin data	5 of 13 grade factors are computable; minimum is 7
Degenerate inputs	latest revenue or assets are at or below the $100,000 validity floor

What the price implies

at the 2026-11-17 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	45.5%	(1.7%)	78
Distance from 52-week high	(76.2%)	(30.5%)	11
EBIT to enterprise value	not computable	0.5%	
Free cash flow yield	(14.9%)	0.5%	25
Book value to price	0.43	0.28	62
Sales to price	0.00	0.36	0
Composite equity issuance, five years	93.6%	13.5%	83
Relative strength against the sector, log excess return	0.20	(0.19)	78
Twelve-month failure probability, CHS model	not computable	0.06%	

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	pass
No new shares issued	fail
Gross margin improved	fail

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.

Asset turnover improved	fail

Cash, filings, liquidity

Cash and equivalents	$44.3M
Operating cash flow, four quarters	-$120.0M
Months of runway	4.4
Days since last periodic filing	8 (10-Q received Nov 10, 2026)
Median daily dollar volume, 63 sessions	$24.4M

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	-$105.0M	2025-12-31	2026-03-17	10-K	26-029580
2	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$69.8M	2025-12-31	2026-03-17	10-K	26-029580
3	assets	us-gaap:Assets	$355.9M	2025-12-31	2026-03-17	10-K	26-029580
4	assets	us-gaap:Assets	$170.5M	2024-12-31	2026-03-17	10-K	26-029580
5	current assets	us-gaap:AssetsCurrent	$322.9M	2025-12-31	2026-03-17	10-K	26-029580
6	current liabilities	us-gaap:LiabilitiesCurrent	$35.8M	2025-12-31	2026-03-17	10-K	26-029580
7	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$304.9M	2025-12-31	2026-03-17	10-K	26-029580
8	operating income	us-gaap:OperatingIncomeLoss	-$108.1M	2025-12-31	2026-03-17	10-K	26-029580
9	book equity	us-gaap:StockholdersEquity	$305.8M	2025-12-31	2026-03-17	10-K	26-029580
10	liabilities	us-gaap:Liabilities	$50.2M	2025-12-31	2026-03-17	10-K	26-029580
11	operating income	us-gaap:OperatingIncomeLoss	-$15.3M	2018-12-31	2020-03-27	10-K	20-039272
12	interest expense	us-gaap:InterestExpense	$0	2018-12-31	2019-03-29	10-K	19-016787
13	revenue	us-gaap:Revenues	$0	2025-12-31	2026-03-17	10-K	26-029580
14	revenue	us-gaap:Revenues	$22.3M	2024-12-31	2026-03-17	10-K	26-029580
15	revenue	us-gaap:Revenues	$25.2M	2023-12-31	2025-03-26	10-K	25-003707
16	revenue	us-gaap:Revenues	$2.6M	2022-12-31	2024-03-11	10-K	24-002861
17	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$2.9M	2025-12-31	2026-03-17	10-K	26-029580
18	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$40.0M	2024-12-31	2026-03-17	10-K	26-029580
19	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$1.2M	2024-12-31	2026-03-17	10-K	26-029580
20	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$25.6M	2023-12-31	2025-03-26	10-K	25-003707
21	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$1.3M	2023-12-31	2025-03-26	10-K	25-003707
22	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$4.9M	2022-12-31	2024-03-11	10-K	24-002861
23	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$2.0M	2022-12-31	2024-03-11	10-K	24-002861
24	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$1.9M	2025-12-31	2026-03-17	10-K	26-029580
25	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$105.0M	2025-12-31	2026-03-17	10-K	26-029580
26	income tax	us-gaap:IncomeTaxExpenseBenefit	$1,600	2025-12-31	2026-03-17	10-K	26-029580
27	current assets	us-gaap:AssetsCurrent	$163.4M	2024-12-31	2026-03-17	10-K	26-029580
28	current liabilities	us-gaap:LiabilitiesCurrent	$21.0M	2024-12-31	2026-03-17	10-K	26-029580
29	assets	us-gaap:Assets	$58.7M	2023-12-31	2025-03-26	10-K	25-003707
30	assets	us-gaap:Assets	$50.1M	2022-12-31	2024-03-11	10-K	24-002861
31	shares outstanding	dei:EntityCommonStockSharesOutstanding	57,510,635	2026-03-16	2026-03-17	10-K	26-029580
32	shares outstanding	dei:EntityCommonStockSharesOutstanding	45,676,202	2025-03-24	2025-03-26	10-K	25-003707

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.