Sadot Group Inc.

SDOT

Nasdaq; shops; SIC 5810, Retail-Eating & Drinking Places; CIK 0001701756

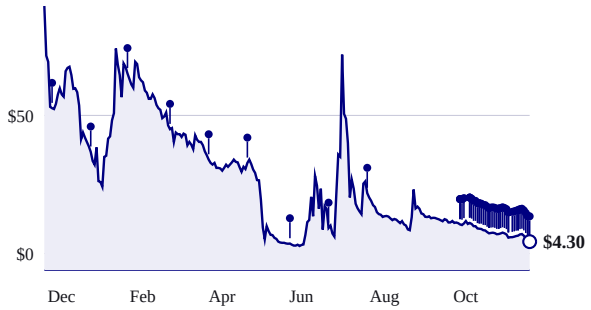
None

No letter

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

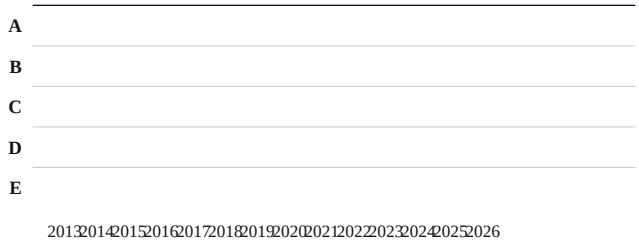
Scoreboard	
Reliability	0.76 AUC filers with under $12.5M assets; 95% interval 0.65 to 0.86; 63 events, 2020 to 2025
Peer failure rate	0.60% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	under $12.5M assets total assets $2.9M
Standard universe	outside revenue above $1M and assets above $10M
Warnings	dilution, late filer, thin data not computable: short runway, distress, fortress balance sheet
Inputs computable	6 of 13
Graded from	filings received through Apr 29, 2026 203 days before the rescan; latest periodic filing 10-Q received Nov 16, 2026
Last close	$4.12 2026-11-17; market equity $7.1M; 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 Apr 29, 2026

or together with its subsidiaries, the "Company" or "Sadot"), a Nevada corporation was incorporated in Nevada on October 25, 2019. The principal corporate office of Sadot Group is located at 295 E Renfro St., Suite 300, Burleson, Texas, 76028, and the telephone number at that location is (832) 604-9568. Our website address is www.sadotgroupinc.com. to in this Form 10-K annual report ("Form 10-K") as the Company. The terms "we", "us" and "our" are also used in the Form 10-K to refer to the Company. Throughout the Form 10-K, the terms "restaurants", "stores", "eatery" and "locations" are used interchangeably.

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 1.4						
Gross profitability	157.7%	43.7%		1.3	224	2025-12-31
Return on invested capital	not computable	11.5%				
one or more required annual facts are missing						

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Accruals ratio	(101.1%)	(4.9%)	1.5	269	2025-12-31
Gross margin stability, five years	not computable	1.2 pts			
five annual gross margins are required; found 2					
Solvency, sleeve percentile 100.0					
Altman Z double-prime	(417.84)	1.92	100.0	198	2025-12-31
Net debt to EBITDA	not computable	1.46x			
one or more required annual facts are missing					
Interest coverage	not computable	2.70x			
interest expense must exceed $100,000					
Current ratio	0.05x	1.34x	100.0	275	2025-12-31
Growth and financing, sleeve percentile 98.1					
Revenue growth, three-year compound	not computable	1.8%			
four consecutive annual observations are required					
Free cash flow growth, three-year compound	not computable	4.7%			
current FCF must be positive and base FCF must exceed $100,000					
Reinvestment rate	not computable	13.3%			
latest aligned inputs end 2024-12-31; latest annual assets end 2025-12-31					
Asset growth, three years	(52.6%)	3.1%	99.6	252	2025-12-31
Net share issuance, one year	213.0%	(0.6%)	96.6	208	2026-04-28

Warnings

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

Check	Measured
Dilution	split-adjusted year-over-year share growth is 213.0%
Late filer	found 2 NT 10-K/Q filings in the last eight quarters
Thin data	6 of 13 grade factors are computable; minimum is 7

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	(91.0%)	(0.8%)	2
Distance from 52-week high	(95.2%)	(23.1%)	3
EBIT to enterprise value	(852.1%)	5.1%	0
Free cash flow yield	(38.2%)	3.9%	8
Book value to price	1.61	0.36	91
Sales to price	33.56	1.61	99
Composite equity issuance, five years	551.1%	(17.1%)	99
Relative strength against the sector, log excess return	(2.32)	0.08	2
Twelve-month failure probability, CHS model	not computable	0.04%	

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 1 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
No new shares issued	fail
Gross margin improved	fail

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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	2 (10-Q received Nov 16, 2026)
Median daily dollar volume, 63 sessions	$547,128

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	$4.6M	2025-12-31	2026-04-29	10-K	26-000630
2	assets	us-gaap:Assets	$2.9M	2025-12-31	2026-04-29	10-K	26-000630
3	net income	us-gaap:NetIncomeLoss	-$93.4M	2025-12-31	2026-04-29	10-K	26-000630
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesC...	-$8.7M	2025-12-31	2026-04-29	10-K	26-000630
5	assets	us-gaap:Assets	$164.7M	2024-12-31	2026-04-29	10-K	26-000630
6	current assets	us-gaap:AssetsCurrent	$2.8M	2025-12-31	2026-04-29	10-K	26-000630
7	current liabilities	us-gaap:LiabilitiesCurrent	$57.6M	2025-12-31	2026-04-29	10-K	26-000630
8	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$176.6M	2025-12-31	2026-04-29	10-K	26-000630
9	operating income	us-gaap:OperatingIncomeLoss	-$40.5M	2025-12-31	2026-04-29	10-K	26-000630
10	book equity	us-gaap:StockholdersEquity	-$57.4M	2025-12-31	2026-04-29	10-K	26-000630
11	liabilities	us-gaap:Liabilities	$57.6M	2025-12-31	2026-04-29	10-K	26-000630
12	operating income	us-gaap:OperatingIncomeLoss	-$8.1M	2022-12-31	2024-03-20	10-K	24-000040
13	interest expense	us-gaap:InterestExpense	$6,730	2022-12-31	2023-03-21	10-K	23-008370
14	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$246.9M	2025-12-31	2026-04-29	10-K	26-000630
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$700.9M	2024-12-31	2026-04-29	10-K	26-000630
16	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$161.7M	2022-12-31	2023-03-21	10-K	23-008370
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$10.3M	2021-12-31	2023-03-21	10-K	23-008370
18	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesC...	-$2.8M	2024-12-31	2026-04-29	10-K	26-000630
19	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$37,000	2024-12-31	2026-04-29	10-K	26-000630
20	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$13.4M	2023-12-31	2024-03-20	10-K	24-000040
21	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$7.3M	2023-12-31	2025-03-11	10-K	25-000043
22	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$198,000	2022-12-31	2024-03-20	10-K	24-000040
23	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$597,000	2022-12-31	2024-03-20	10-K	24-000040
24	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$6.4M	2021-12-31	2023-03-21	10-K	23-008370
25	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$262,019	2021-12-31	2023-03-21	10-K	23-008370
26	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$259,000	2024-12-31	2026-04-29	10-K	26-000630
27	operating income	us-gaap:OperatingIncomeLoss	$6.2M	2024-12-31	2026-04-29	10-K	26-000630
28	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$5.6M	2024-12-31	2026-04-29	10-K	26-000630
29	income tax	us-gaap:IncomeTaxExpenseBenefit	$3,000	2024-12-31	2026-04-29	10-K	26-000630
30	current assets	us-gaap:AssetsCurrent	$152.7M	2024-12-31	2026-04-29	10-K	26-000630
31	current liabilities	us-gaap:LiabilitiesCurrent	$132.2M	2024-12-31	2026-04-29	10-K	26-000630
32	current assets	us-gaap:AssetsCurrent	$112.9M	2023-12-31	2025-03-11	10-K	25-000043
33	current liabilities	us-gaap:LiabilitiesCurrent	$104.6M	2023-12-31	2025-03-11	10-K	25-000043
34	assets	us-gaap:Assets	$178.1M	2023-12-31	2025-03-11	10-K	25-000043
35	assets	us-gaap:Assets	$27.2M	2022-12-31	2024-03-20	10-K	24-000040
36	shares outstanding	dei:EntityCommonStockSharesOutstanding	1,835,668	2026-04-28	2026-04-29	10-K	26-000630
37	shares outstanding	dei:EntityCommonStockSharesOutstanding	5,865,476	2025-03-11	2025-03-11	10-K	25-000043

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