Capricor Therapeutics, Inc.

CAPR

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

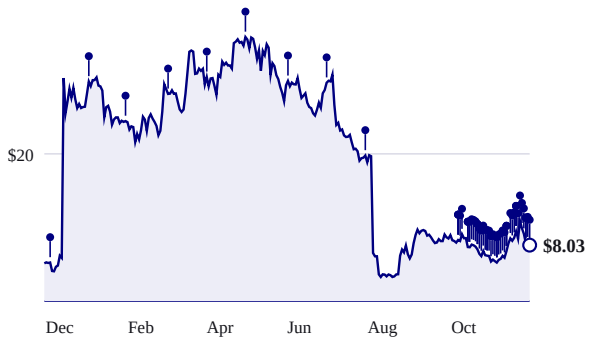
None

No letter

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

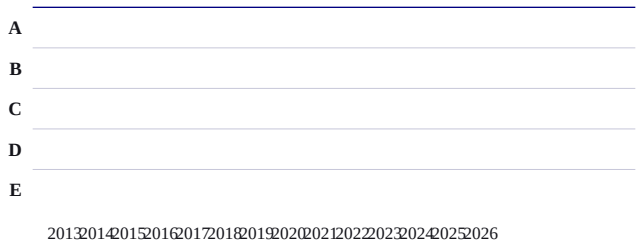
Scoreboard	
Reliability	0.87 AUC filers with $120M to $591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025
Peer failure rate	1.03% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$120M to $591M assets total assets $355.9M
Standard universe	outside revenue above $1M 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 247 days before the rescan; latest periodic filing 10-Q received Nov 10, 2026
Last close	$8.04 2026-11-18; market equity $467.5M; 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 31.8						
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%)		31.8	756	2025-12-31

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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 34.2						
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%		65.7	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 2026-11-18 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	(77.3%)	(30.2%)	10
EBIT to enterprise value	not computable	0.5%	
Free cash flow yield	(15.6%)	0.6%	24
Book value to price	0.45	0.29	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

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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	9 (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

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