Oramed Pharmaceuticals Inc. ORMP

Nasdaq; healthcare; SIC 2834, Pharmaceutical Preparations; CIK 0001176309

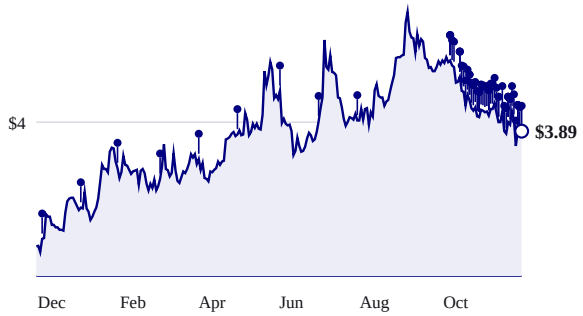
None

No letter

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

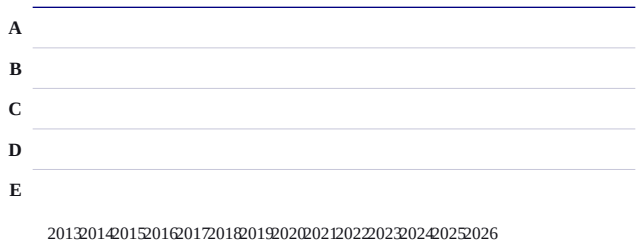
Scoreboard	
Reliability	0.87 AUC filers with $120M to $591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025
Peer failure rate	1.03% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$120M to $591M assets total assets $230.9M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	late filer, thin data not computable: short runway, distress
Inputs computable	5 of 13
Graded from	filings received through Mar 26, 2026 238 days before the rescan; latest periodic filing 10-Q received Nov 12, 2026
Last close	$3.90 2026-11-18; market equity $169.6M; 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 26, 2026

-Description of Business- Intellectual Property and Patents." commencing a new clinical trial for our oral insulin capsule, there are a variety of risks and uncertainties related to its development. top-line results from the phase 3 trial of our oral insulin capsule, which did not meet its primary or secondary endpoints, and indicated that we expect to discontinue oral insulin clinical activities for T2D. At present, following the results of the ORA-D-013-1 Phase 3 trial, we conducted a comprehensive analysis of the data and found that subpopulations of patients with pooled specific parameters responded well to oral insulin.

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 96.4						
Gross profitability	0.01%	32.8%		95.4	346	2025-12-31
Return on invested capital	not computable	9.6%				

a prior annual debt, equity, and cash observation is required

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Accruals ratio	37.9%	(6.7%)	97.4	756	2025-12-31
Gross margin stability, five years	not computable	2.8 pts			
five annual gross margins are required; found 4					
Solvency, sleeve percentile 26.5					
Altman Z double-prime	not computable	0.31			
one or more required annual facts are missing					
Net debt to EBITDA	not computable	1.82x			
EBITDA must exceed $100,000					
Interest coverage	not computable	(3.61x)			
latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31					
Current ratio	6.98x	2.68x	26.5	781	2025-12-31
Growth and financing, sleeve percentile 18.6					
Revenue growth, three-year compound	not computable	9.6%			
four consecutive annual observations are required					
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%			
NOPAT must exceed $100,000					
Asset growth, three years	12.6%	3.2%	28.2	663	2025-12-31
Net share issuance, one year	(1.0%)	1.6%	9.0	625	2026-03-26

Warnings

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

Check	Measured
Late filer	found 1 NT 10-K/Q filings in the last eight quarters
Thin data	5 of 13 grade factors are computable; minimum is 7

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	109.6%	(1.7%)	95
Distance from 52-week high	(27.2%)	(30.2%)	52
EBIT to enterprise value	(6.6%)	0.5%	34
Free cash flow yield	(5.4%)	0.6%	33
Book value to price	2.00	0.29	94
Sales to price	0.01	0.36	2
Composite equity issuance, five years	53.8%	13.5%	74
Relative strength against the sector, log excess return	0.57	(0.19)	95
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	pass
Operating cash flow above zero	fail
Return on assets improved	pass
Operating cash flow exceeds net income	fail
Long-term leverage fell	fail
Current ratio improved	fail
No new shares issued	pass
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	7 (10-Q received Nov 12, 2026)
Median daily dollar volume, 63 sessions	$605,310

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	$13,000	2025-12-31	2026-03-26	10-K	26-034835
2	assets	us-gaap:Assets	$230.9M	2025-12-31	2026-03-26	10-K	26-034835
3	operating income	us-gaap:OperatingIncomeLoss	-$14.6M	2019-08-31	2020-11-24	10-K	20-038924
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$14.1M	2019-08-31	2020-11-24	10-K	20-038924
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$300,000	2019-08-31	2020-11-24	10-K	20-038924
6	total debt	us-gaap:LongTermDebt	$9.7M	2019-08-31	2019-11-27	10-K	19-024940
7	book equity	us-gaap:StockholdersEquity	$19.4M	2019-08-31	2020-11-24	10-K	20-038924
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$3.3M	2019-08-31	2021-11-24	10-K	21-062009
9	net income	us-gaap:NetIncomeLoss	$64.0M	2025-12-31	2026-03-26	10-K	26-034835
10	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$9.1M	2025-12-31	2026-03-26	10-K	26-034835
11	assets	us-gaap:Assets	$155.3M	2024-12-31	2026-03-26	10-K	26-034835
12	depreciation amortization	us-gaap:Depreciation	$8,000	2019-08-31	2020-11-24	10-K	20-038924
13	operating income	us-gaap:OperatingIncomeLoss	-$15.8M	2023-12-31	2025-03-27	10-K	25-003450
14	interest expense	us-gaap:InterestExpense	$2.0M	2023-12-31	2024-03-06	10-K	24-020485
15	current assets	us-gaap:AssetsCurrent	$133.3M	2025-12-31	2026-03-26	10-K	26-034835
16	current liabilities	us-gaap:LiabilitiesCurrent	$19.1M	2025-12-31	2026-03-26	10-K	26-034835
17	revenue	us-gaap:Revenues	$2.0M	2025-12-31	2026-03-26	10-K	26-034835
18	revenue	us-gaap:Revenues	$1.3M	2023-12-31	2025-03-27	10-K	25-003450
19	revenue	us-gaap:Revenues	$2.7M	2022-12-31	2024-03-06	10-K	24-020485
20	revenue	us-gaap:Revenues	$2.7M	2021-08-31	2021-11-24	10-K	21-062009
21	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$9,000	2025-12-31	2026-03-26	10-K	26-034835
22	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$8.4M	2024-12-31	2026-03-26	10-K	26-034835
23	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$18,000	2024-12-31	2026-03-26	10-K	26-034835
24	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$10.3M	2023-12-31	2025-03-27	10-K	25-003450
25	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$254,000	2023-12-31	2025-03-27	10-K	25-003450
26	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$27.9M	2022-12-31	2024-03-06	10-K	24-020485
27	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$496,000	2022-12-31	2024-03-06	10-K	24-020485
28	depreciation amortization	us-gaap:Depreciation	$121,000	2025-12-31	2026-03-26	10-K	26-034835
29	operating income	us-gaap:OperatingIncomeLoss	-$15.1M	2025-12-31	2026-03-26	10-K	26-034835
30	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$75.3M	2025-12-31	2026-03-26	10-K	26-034835
31	income tax	us-gaap:IncomeTaxExpenseBenefit	$11.3M	2025-12-31	2026-03-26	10-K	26-034835
32	current assets	us-gaap:AssetsCurrent	$143.2M	2024-12-31	2026-03-26	10-K	26-034835
33	current liabilities	us-gaap:LiabilitiesCurrent	$5.7M	2024-12-31	2026-03-26	10-K	26-034835
34	assets	us-gaap:Assets	$220.6M	2023-12-31	2025-03-27	10-K	25-003450
35	assets	us-gaap:Assets	$161.6M	2022-12-31	2024-03-06	10-K	24-020485
36	shares outstanding	dei:EntityCommonStockSharesOutstanding	40,446,179	2026-03-26	2026-03-26	10-K	26-034835
37	shares outstanding	dei:EntityCommonStockSharesOutstanding	40,850,455	2025-03-27	2025-07-16	10-K/A	25-064678

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