Sensus Healthcare, Inc.

SRTS

Nasdaq; healthcare; SIC 3841, Surgical & Medical Instruments & Apparatus; CIK 0001494891

B

second fifth of 305 graded peers in healthcare

rank 83 of 305; percentile 27.0; sampling error 2.8 points; lower is stronger

A B C D E

B, the elk



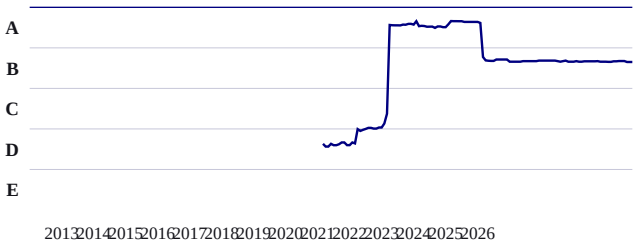
Scoreboard	
Profitability	C/D percentile 57.5
Solvency	A percentile 11.7
Growth and financing	C percentile 51.7
Reliability	0.83 AUC filers with $12.5M to $120M assets; 95% interval 0.79 to 0.86; 201 events, 2020 to 2025
Peer failure rate	1.07% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$12.5M to $120M assets total assets $53.0M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress, fortress balance sheet
Inputs computable	8 of 13
Graded from	filings received through Mar 4, 2026 260 days before the rescan; latest periodic filing 10-Q received Nov 13, 2026
Last close	$2.29 2026-11-18; market equity $37.8M; 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 4, 2026

its subsidiaries, Sensus Medical Devices Ltd. and Sensus Healthcare Services, LLC, unless the context otherwise indicates, "Sensus," "we," "us," "our," or the "Company") is a medical device company committed to providing highly effective, non-invasive treatments for non-melanoma skin cancer (NMSC) and post-surgical keloid scar prevention. The Company uses a proprietary low-energy X-ray technology known as superficial radiation therapy ("SRT"), which is based on decades of dedicated research and development, and has successfully incorporated SRT into a portfolio of treatment devices: the SRT-100TM, SRT-100+TM and SRT-100 VisionTM.

The thirteen inputs

lower percentile is stronger; sleeves and inputs within a sleeve carry equal weight

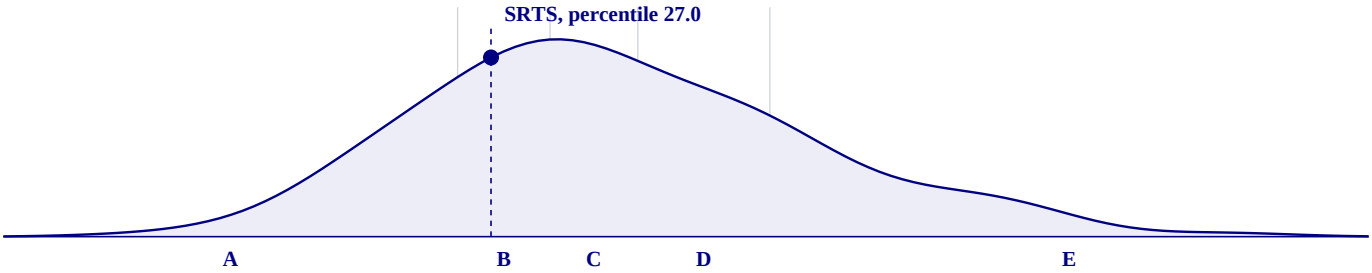
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 57.5						
Gross profitability	22.4%	32.8%		60.6	346	2025-12-31
Return on invested capital	not computable	9.6%				
one or more required annual facts are missing						

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.

Accruals ratio	(14.3%)	(6.7%)	30.2	756	2025-12-31
Gross margin stability, five years	7.9 pts	2.8 pts	81.8	237	2025-12-31
Solvency, sleeve percentile 11.7					
Altman Z double-prime	14.36	0.31	5.4	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)			
latest aligned inputs end 2024-12-31; latest annual assets end 2025-12-31					
Current ratio	9.72x	2.68x	18.1	781	2025-12-31
Growth and financing, sleeve percentile 51.7					
Revenue growth, three-year compound	(14.9%)	9.6%	87.2	400	2025-12-31
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	(2.2%)	3.2%	56.8	663	2025-12-31
Net share issuance, one year	(0.2%)	1.6%	11.1	625	2026-02-24

Among 305 peers

healthcare; letters are fifths of this list



Composite score of every graded peer, smoothed; vertical rules are the letter band edges; stronger to the left.

Rank	Company	Percentile	Letter	Warnings
78	NeuroPace Inc. (NPCE)	25.3	B	
79	GE HealthCare Technologies Inc. (GEHC)	25.7	B	
80	Phibro Animal Health Corp. (PAHC)	26.0	B	
81	Mannatech Inc. (MTEX)	26.3	B	late filer, fortress balance sheet
82	Agios Pharmaceuticals, Inc. (AGIO)	26.6	B	short runway
83	Sensus Healthcare, Inc. (SRTS)	27.0	B	
84	Alphatec Holdings, Inc. (ATEC)	27.3	B	
85	Travere Therapeutics, Inc. (TVTX)	27.6	B	
86	Tela Bio, Inc. (TELA)	28.0	B	fortress balance sheet
87	Cytokinetics Inc. (CYTK)	28.3	B	short runway
88	Myriad Genetics Inc. (MYGN)	28.6	B	fortress balance sheet

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	(6.3%)	(1.7%)	45
Distance from 52-week high	(56.6%)	(30.2%)	29
EBIT to enterprise value	not computable	0.5%	
Free cash flow yield	0.9%	0.6%	52
Book value to price	0.94	0.29	85
Sales to price	0.73	0.36	70

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.

Composite equity issuance, five years	(0.1%)	13.5%	31
Relative strength against the sector, log excess return	(0.24)	(0.19)	45
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	pass
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	pass
Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$12.9M
Operating cash flow, four quarters	-$11.4M
Months of runway	13.7
Days since last periodic filing	6 (10-Q received Nov 13, 2026)
Median daily dollar volume, 63 sessions	$77,244

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	$11.9M	2025-12-31	2026-03-04	10-K	26-000435
2	assets	us-gaap:Assets	$53.0M	2025-12-31	2026-03-04	10-K	26-000435
3	net income	us-gaap:NetIncomeLoss	-$7.7M	2025-12-31	2026-03-04	10-K	26-000435
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$528,000	2025-12-31	2026-03-04	10-K	26-000435
5	assets	us-gaap:Assets	$62.2M	2024-12-31	2026-03-04	10-K	26-000435
6	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$27.5M	2025-12-31	2026-03-04	10-K	26-000435
7	gross profit	us-gaap:GrossProfit	$24.4M	2024-12-31	2026-03-04	10-K	26-000435
8	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$41.8M	2024-12-31	2026-03-04	10-K	26-000435
9	gross profit	us-gaap:GrossProfit	$14.1M	2023-12-31	2025-03-05	10-K	25-000408
10	revenue	us-gaap:Revenues	$24.4M	2023-12-31	2025-03-05	10-K	25-000408
11	gross profit	us-gaap:GrossProfit	$29.6M	2022-12-31	2024-03-15	10-K	24-023093
12	revenue	us-gaap:Revenues	$44.5M	2022-12-31	2024-03-15	10-K	24-023093
13	gross profit	us-gaap:GrossProfit	$17.0M	2021-12-31	2023-03-23	10-K	23-022355
14	revenue	us-gaap:Revenues	$27.0M	2021-12-31	2023-03-23	10-K	23-022355
15	current assets	us-gaap:AssetsCurrent	$45.9M	2025-12-31	2026-03-04	10-K	26-000435
16	current liabilities	us-gaap:LiabilitiesCurrent	$4.7M	2025-12-31	2026-03-04	10-K	26-000435
17	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$5.7M	2025-12-31	2026-03-04	10-K	26-000435
18	operating income	us-gaap:OperatingIncomeLoss	-$10.3M	2025-12-31	2026-03-04	10-K	26-000435
19	book equity	us-gaap:StockholdersEquity	$48.1M	2025-12-31	2026-03-04	10-K	26-000435
20	liabilities	us-gaap:Liabilities	$4.9M	2025-12-31	2026-03-04	10-K	26-000435
21	operating income	us-gaap:OperatingIncomeLoss	$8.1M	2024-12-31	2026-03-04	10-K	26-000435
22	interest expense	us-gaap:InterestExpense	-$932,000	2024-12-31	2025-03-05	10-K	25-000408
23	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$196,000	2025-12-31	2026-03-04	10-K	26-000435
24	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$831,000	2024-12-31	2026-03-04	10-K	26-000435
25	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$276,000	2024-12-31	2026-03-04	10-K	26-000435
26	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$2.1M	2023-12-31	2025-03-05	10-K	25-000408
27	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$229,000	2023-12-31	2025-03-05	10-K	25-000408

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.

28	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$1.4M	2022-12-31	2024-03-15	10-K	24-023093
29	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$159,000	2022-12-31	2024-03-15	10-K	24-023093
30	depreciation amortization	us-gaap:Depreciation	$386,000	2025-12-31	2026-03-04	10-K	26-000435
31	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$9.6M	2025-12-31	2026-03-04	10-K	26-000435
32	income tax	us-gaap:IncomeTaxExpenseBenefit	-$1.9M	2025-12-31	2026-03-04	10-K	26-000435
33	current assets	us-gaap:AssetsCurrent	$56.7M	2024-12-31	2026-03-04	10-K	26-000435
34	current liabilities	us-gaap:LiabilitiesCurrent	$5.9M	2024-12-31	2026-03-04	10-K	26-000435
35	assets	us-gaap:Assets	$53.7M	2023-12-31	2025-03-05	10-K	25-000408
36	assets	us-gaap:Assets	$56.7M	2022-12-31	2024-03-15	10-K	24-023093
37	shares outstanding	dei:EntityCommonStockSharesOutstanding	16,462,059	2026-02-24	2026-03-04	10-K	26-000435
38	shares outstanding	dei:EntityCommonStockSharesOutstanding	16,495,396	2025-02-12	2025-03-05	10-K	25-000408

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.