Stereotaxis, Inc.

STXS

NYSE; healthcare; SIC 3845, Electromedical & Electrotherapeutic Apparatus; CIK 0001289340

E

weakest fifth of 305 graded peers in healthcare

rank 261 of 305; percentile 85.5; sampling error 2.8 points; lower is stronger

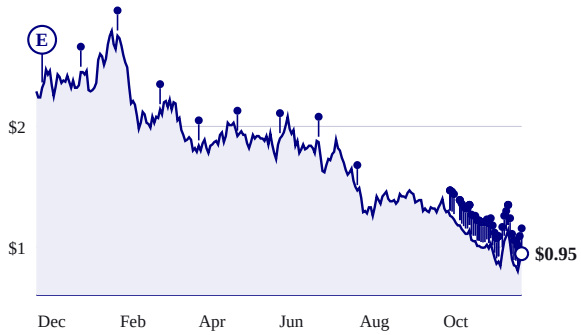
A B C D E

E, the bear



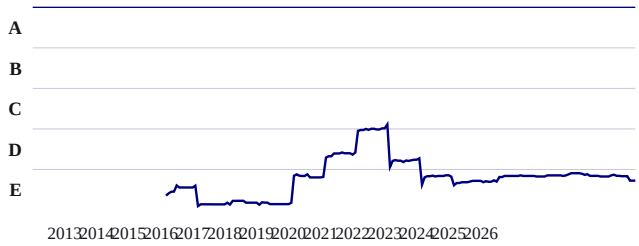
Scoreboard	
Profitability	C percentile 48.5
Solvency	E percentile 84.1
Growth and financing	C percentile 56.3
Reliability	0.83 AUC filers with $12.5M to $120M assets; 95% interval 0.79 to 0.86; 201 events, 2020 to 2025
Peer failure rate	1.07% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$12.5M to $120M assets total assets $52.3M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	short runway
Inputs computable	8 of 13
Graded from	filings received through Apr 3, 2026 230 days before the rescan; latest periodic filing 10-Q received Nov 16, 2026
Last close	$0.94 2026-11-18; market equity $94.4M; 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 12, 2026

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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 48.5						
Gross profitability	32.7%	32.8%		44.9	346	2025-12-31
Return on invested capital	not computable	9.6%				

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one or more required annual facts are missing						
Accruals ratio	(16.1%)	(6.7%)	26.0	756	2025-12-31	
Gross margin stability, five years	5.9 pts	2.8 pts	74.6	237	2025-12-31	
Solvency, sleeve percentile 84.1						
Altman Z double-prime	(37.38)	0.31	85.9	705	2025-12-31	
Net debt to EBITDA	not computable	1.82x				
EBITDA must exceed $100,000						
Interest coverage	not computable	(3.61x)				
interest expense must exceed $100,000						
Current ratio	1.51x	2.68x	82.3	781	2025-12-31	
Growth and financing, sleeve percentile 56.3						
Revenue growth, three-year compound	4.8%	9.6%	61.2	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%				
one or more required annual facts are missing						
Asset growth, three years	(0.7%)	3.2%	52.9	663	2025-12-31	
Net share issuance, one year	13.1%	1.6%	54.8	625	2026-02-28	

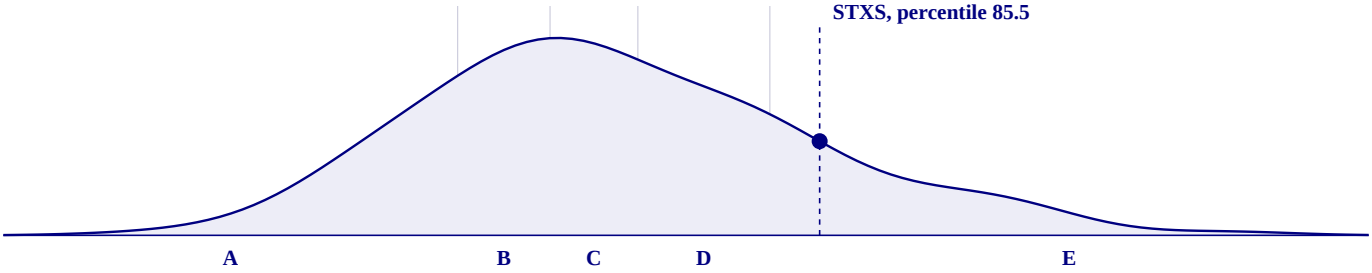
Warnings

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

Check	Measured
Short runway	cash runway is 3.1 months

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
256	Moderna, Inc. (MRNA)	83.9	E	
257	Accuray Inc. (ARAY)	84.2	E	late filer
258	SkinHealth Systems Inc. (SKIN)	84.5	E	
259	Opko Health, Inc. (OPK)	84.9	E	fortress balance sheet
260	Personalis, Inc. (PSNL)	85.2	E	
261	Stereotaxis, Inc. (STXS)	85.5	E	short runway
262	Journey Medical Corp. (DERM)	85.9	E	
263	Heron Therapeutics, Inc. (HRTX)	86.2	E	
264	Amgen Inc. (AMGN)	86.5	E	
265	Organon & Co. (OGN)	86.8	E	
266	Sonoma Pharmaceuticals, Inc. (SNOA)	87.2	E	dilution, fortress balance sheet

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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	(57.7%)	(1.7%)	12
Distance from 52-week high	(66.1%)	(30.2%)	17
EBIT to enterprise value	(23.5%)	0.5%	19
Free cash flow yield	(14.4%)	0.6%	24
Book value to price	0.22	0.29	43
Sales to price	0.34	0.36	46
Composite equity issuance, five years	31.3%	13.5%	67
Relative strength against the sector, log excess return	(1.03)	(0.19)	12
Twelve-month failure probability, CHS model	0.56%	0.06%	82

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
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$4.0M
Operating cash flow, four quarters	-$15.3M
Months of runway	3.1
Days since last periodic filing	3 (10-Q received Nov 16, 2026)
Median daily dollar volume, 63 sessions	$673,418

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	$17.1M	2025-12-31	2026-03-12	10-K	26-009881
2	assets	us-gaap:Assets	$52.3M	2025-12-31	2026-03-12	10-K	26-009881
3	net income	us-gaap:NetIncomeLoss	-$21.6M	2025-12-31	2026-03-12	10-K	26-009881
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$13.7M	2025-12-31	2026-03-12	10-K	26-009881
5	assets	us-gaap:Assets	$46.7M	2024-12-31	2026-03-12	10-K	26-009881
6	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$32.4M	2025-12-31	2026-03-12	10-K	26-009881
7	gross profit	us-gaap:GrossProfit	$14.6M	2024-12-31	2026-03-12	10-K	26-009881
8	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$26.9M	2024-12-31	2026-03-12	10-K	26-009881
9	gross profit	us-gaap:GrossProfit	$14.9M	2023-12-31	2025-03-14	10-K	25-010352
10	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$26.8M	2023-12-31	2025-03-14	10-K	25-010352
11	gross profit	us-gaap:GrossProfit	$18.5M	2022-12-31	2024-03-08	10-K	24-009371
12	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$28.1M	2022-12-31	2024-03-08	10-K	24-009371
13	gross profit	us-gaap:GrossProfit	$23.2M	2021-12-31	2023-03-09	10-K	23-007106
14	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$35.0M	2021-12-31	2023-03-09	10-K	23-007106
15	current assets	us-gaap:AssetsCurrent	$33.8M	2025-12-31	2026-03-12	10-K	26-009881
16	current liabilities	us-gaap:LiabilitiesCurrent	$22.4M	2025-12-31	2026-03-12	10-K	26-009881
17	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$583.4M	2025-12-31	2026-03-12	10-K	26-009881

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18	operating income	us-gaap:OperatingIncomeLoss	-$22.1M	2025-12-31	2026-03-12	10-K	26-009881
19	book equity	us-gaap:StockholdersEquity	$13.5M	2025-12-31	2026-03-12	10-K	26-009881
20	liabilities	us-gaap:Liabilities	$33.5M	2025-12-31	2026-03-12	10-K	26-009881
21	total debt	us-gaap:LongTermDebt	$18.4M	2015-12-31	2016-03-11	10-K	16-501650
22	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$5.6M	2015-12-31	2018-03-20	10-K	18-089265
23	operating income	us-gaap:OperatingIncomeLoss	-$5.4M	2015-12-31	2017-03-16	10-K	17-085191
24	depreciation amortization	us-gaap:Depreciation	$320,301	2015-12-31	2017-03-16	10-K	17-085191
25	operating income	us-gaap:OperatingIncomeLoss	-$2.5M	2018-12-31	2020-03-16	10-K	20-004012
26	interest expense	us-gaap:InterestExpense	$16,566	2018-12-31	2019-03-15	10-K	19-003425
27	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$93,000	2025-12-31	2026-03-12	10-K	26-009881
28	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$8.5M	2024-12-31	2026-03-12	10-K	26-009881
29	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$34,000	2024-12-31	2026-03-12	10-K	26-009881
30	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$9.1M	2023-12-31	2025-03-14	10-K	25-010352
31	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$366,000	2023-12-31	2025-03-14	10-K	25-010352
32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$8.4M	2022-12-31	2024-03-08	10-K	24-009371
33	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$2.4M	2022-12-31	2024-03-08	10-K	24-009371
34	assets	us-gaap:Assets	$41.9M	2023-12-31	2025-03-14	10-K	25-010352
35	assets	us-gaap:Assets	$53.4M	2022-12-31	2024-03-08	10-K	24-009371
36	shares outstanding	dei:EntityCommonStockSharesOutstanding	97,248,936	2026-02-28	2026-04-03	10-K/A	26-015172
37	shares outstanding	dei:EntityCommonStockSharesOutstanding	85,979,662	2025-02-28	2025-03-14	10-K	25-010352

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