Nexentis Technologies Inc.

NXTS

Nasdaq; healthcare; SIC 2834, Pharmaceutical Preparations; CIK 0001789192

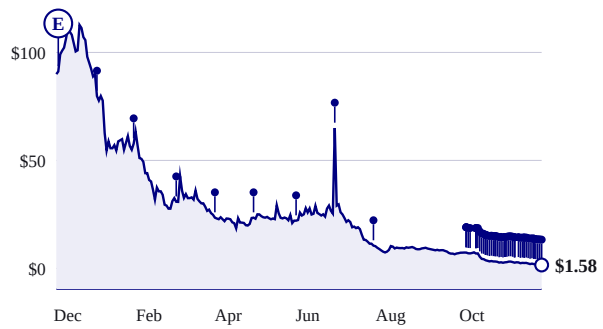
None

No letter

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

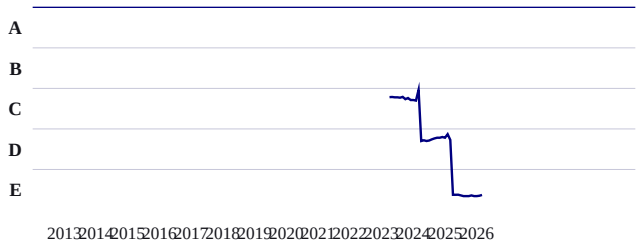
Scoreboard	
Reliability	0.83 AUC filers with $12.5M to $120M assets; 95% interval 0.79 to 0.86; 201 events, 2020 to 2025
Peer failure rate	1.07% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$12.5M to $120M assets total assets $20.4M
Standard universe	outside revenue above $1M and assets above $10M
Warnings	dilution, thin data; fortress balance sh...
Inputs computable	5 of 13
Graded from	filings received through Mar 31, 2026 235 days before the rescan; latest periodic filing 10-Q received Nov 16, 2026
Last close	$1.85 2026-11-18; market equity $1.2M; 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 31, 2026

were incorporated in the State of Delaware on April 1, 2009 under the name Pimi Agro Cleantech, Inc. On April 11, 2016, we changed our name from Pimi Agro Cleantech, Inc. to Save Foods, Inc., on March 19, 2024 we changed our name to N2OFF, Inc., and on February 26, 2026, we changed our name to Nexentis Technologies Inc.

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 78.1						
Gross profitability	not computable	32.8%				
latest aligned inputs end 2024-12-31; latest annual assets end 2025-12-31						
Return on invested capital	not computable	9.6%				
required facts have no common fiscal period end						
Accruals ratio	(1.5%)	(6.7%)		78.1	756	2025-12-31

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Gross margin stability, five years	not computable	2.8 pts				
latest aligned inputs end 2024-12-31; latest annual assets end 2025-12-31						
Solvency, sleeve percentile 46.7						
Altman Z double-prime	(2.48)	0.31		48.7	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	4.19x	2.68x		44.6	781	2025-12-31
Growth and financing, sleeve percentile 52.4						
Revenue growth, three-year compound	not computable	9.6%				
latest aligned inputs end 2024-12-31; latest annual assets end 2025-12-31						
Free cash flow growth, three-year compound	not computable	11.1%				
four consecutive annual FCF observations are required; found 4						
Reinvestment rate	not computable	33.9%				
NOPAT must exceed $100,000						
Asset growth, three years	46.5%	3.2%		8.5	663	2025-12-31
Net share issuance, one year	904.3%	1.6%		96.3	626	2026-03-31

Warnings

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

Check	Measured
Dilution	split-adjusted year-over-year share growth is 904.3%
Thin data	5 of 13 grade factors are computable; minimum is 7
Fortress balance sheet	cash minus debt is 6,742,548 USD; Altman Z is not used

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	(94.1%)	(1.7%)	1
Distance from 52-week high	(98.6%)	(33.0%)	1
EBIT to enterprise value	not computable	0.5%	
Free cash flow yield	(362.9%)	0.6%	1
Book value to price	12.25	0.29	99
Sales to price	0.20	0.38	32
Composite equity issuance, five years	not computable	13.5%	
Relative strength against the sector, log excess return	(3.01)	(0.19)	1
Twelve-month failure probability, CHS model	0.08%	0.06%	57

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	fail
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	fail

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Cash, filings, liquidity	
Cash and equivalents	$2.8M
Operating cash flow, four quarters	-$4.7M
Months of runway	7.3
Days since last periodic filing	5 (10-Q received Nov 16, 2026)
Median daily dollar volume, 63 sessions	$30,906

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	$45,000	2024-12-31	2025-03-31	10-K	25-001513
2	assets	us-gaap:Assets	$5.5M	2024-12-31	2026-03-31	10-K	26-014183
3	net income	us-gaap:NetIncomeLoss	-$4.0M	2025-12-31	2026-03-31	10-K	26-014183
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$3.8M	2025-12-31	2026-03-31	10-K	26-014183
5	assets	us-gaap:Assets	$20.4M	2025-12-31	2026-03-31	10-K	26-014183
6	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$210,000	2024-12-31	2025-03-31	10-K	25-001513
7	gross profit	us-gaap:GrossProfit	$208,000	2023-12-31	2025-03-31	10-K	25-001513
8	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$263,000	2023-12-31	2025-03-31	10-K	25-001513
9	gross profit	us-gaap:GrossProfit	$235,691	2022-12-31	2024-04-01	10-K	24-012356
10	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$394,004	2022-12-31	2024-04-01	10-K	24-012356
11	gross profit	us-gaap:GrossProfit	$302,198	2021-12-31	2023-03-27	10-K	23-009116
12	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$438,141	2021-12-31	2023-03-27	10-K	23-009116
13	gross profit	us-gaap:GrossProfit	$188,869	2020-12-31	2022-03-31	10-K	22-008526
14	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$232,274	2020-12-31	2022-03-31	10-K	22-008526
15	current assets	us-gaap:AssetsCurrent	$6.0M	2025-12-31	2026-03-31	10-K	26-014183
16	current liabilities	us-gaap:LiabilitiesCurrent	$1.4M	2025-12-31	2026-03-31	10-K	26-014183
17	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$38.6M	2025-12-31	2026-03-31	10-K	26-014183
18	operating income	us-gaap:OperatingIncomeLoss	-$4.2M	2025-12-31	2026-03-31	10-K	26-014183
19	book equity	us-gaap:StockholdersEquity	$16.0M	2025-12-31	2026-03-31	10-K	26-014183
20	liabilities	us-gaap:Liabilities	$4.7M	2025-12-31	2026-03-31	10-K	26-014183
21	total debt	us-gaap:LongTermDebt	$8,390	2021-12-31	2022-03-31	10-K	22-008526
22	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$6.8M	2021-12-31	2023-03-27	10-K	23-009116
23	operating income	us-gaap:OperatingIncomeLoss	-$4.7M	2021-12-31	2023-03-27	10-K	23-009116
24	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$57,195	2021-12-31	2022-03-31	10-K	22-008526
25	operating income	us-gaap:OperatingIncomeLoss	-$3.3M	2024-12-31	2026-03-31	10-K	26-014183
26	interest expense	us-gaap:InterestExpense	$16	2024-12-31	2025-03-31	10-K	25-001513
27	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$14,000	2025-12-31	2026-03-31	10-K	26-014183
28	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$71,000	2025-12-31	2026-03-31	10-K	26-014183
29	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$3.6M	2025-12-31	2026-03-31	10-K	26-014183
30	income tax	us-gaap:IncomeTaxExpenseBenefit	-$18,000	2025-12-31	2026-03-31	10-K	26-014183
31	current assets	us-gaap:AssetsCurrent	$3.5M	2024-12-31	2026-03-31	10-K	26-014183
32	current liabilities	us-gaap:LiabilitiesCurrent	$892,000	2024-12-31	2026-03-31	10-K	26-014183
33	assets	us-gaap:Assets	$7.2M	2023-12-31	2025-03-31	10-K	25-001513
34	assets	us-gaap:Assets	$6.5M	2022-12-31	2024-04-01	10-K	24-012356
35	shares outstanding	dei:EntityCommonStockSharesOutstanding	5,111,362	2026-03-31	2026-03-31	10-K	26-014183
36	shares outstanding	dei:EntityCommonStockSharesOutstanding	17,812,404	2025-03-31	2025-03-31	10-K	25-001513

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