Omnicell, Inc.

OMCL

Nasdaq; business equipment; SIC 3571, Electronic Computers; CIK 0000926326

D

fourth fifth of 469 graded peers in business equipment

rank 315 of 469; percentile 67.1; sampling error 2.3 points; lower is stronger

A B C D E

D, the sloth



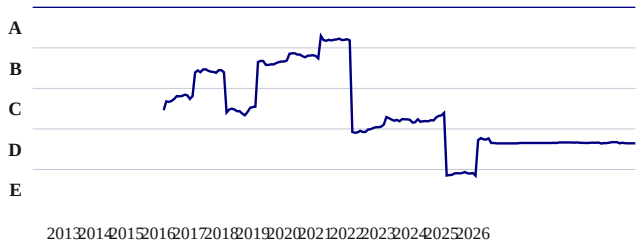
Scoreboard	
Profitability	C percentile 55.8
Solvency	C percentile 51.4
Growth and financing	C percentile 56.5
Reliability	0.91 AUC filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025
Peer failure rate	1.01% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$591M to $2.67B assets total assets $2.0B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered; fortress balance sheet not computable: distress
Inputs computable	10 of 13
Graded from	filings received through Feb 26, 2026 270 days before the rescan; latest periodic filing 10-Q received Nov 4, 2026
Last close	$32.47 2026-11-20; market equity $1.5B; 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 Feb 26, 2026

Omnicell, a leading healthcare technology provider focused on empowering autonomous medication management, is committed to solving the critical challenges inherent in medication management and elevating the role of clinicians within healthcare as an essential component of care delivery. Omnicell is focused on helping its customers define and deliver a cost-effective medication management strategy designed to equip and empower pharmacists and nurses to focus on patient care rather than administrative tasks, and to drive improved clinical, operational, and financial outcomes across all care settings.

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 55.8						
Gross profitability	25.5%	29.4%		54.7	513	2025-12-31
Return on invested capital	not computable	11.2%				

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

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Accruals ratio	(6.1%)	(7.4%)	59.3	566	2025-12-31
Gross margin stability, five years	2.5 pts	2.3 pts	53.3	406	2025-12-31
Solvency, sleeve percentile 51.4					
Altman Z double-prime	3.07	2.18	36.2	517	2025-12-31
Net debt to EBITDA	not computable	1.11x			
latest aligned inputs end 2019-12-31; latest annual assets end 2025-12-31					
Interest coverage	not computable	4.90x			
interest expense must exceed $100,000					
Current ratio	1.43x	1.98x	66.6	600	2025-12-31
Growth and financing, sleeve percentile 56.5					
Revenue growth, three-year compound	(2.9%)	6.6%	76.3	503	2025-12-31
Free cash flow growth, three-year compound	42.2%	17.4%	20.6	253	2025-12-31
Reinvestment rate	(5,854.3%)	14.3%	99.5	213	2025-12-31
Asset growth, three years	(3.7%)	5.0%	70.5	519	2025-12-31
Net share issuance, one year	(2.8%)	0.5%	15.6	404	2026-02-18

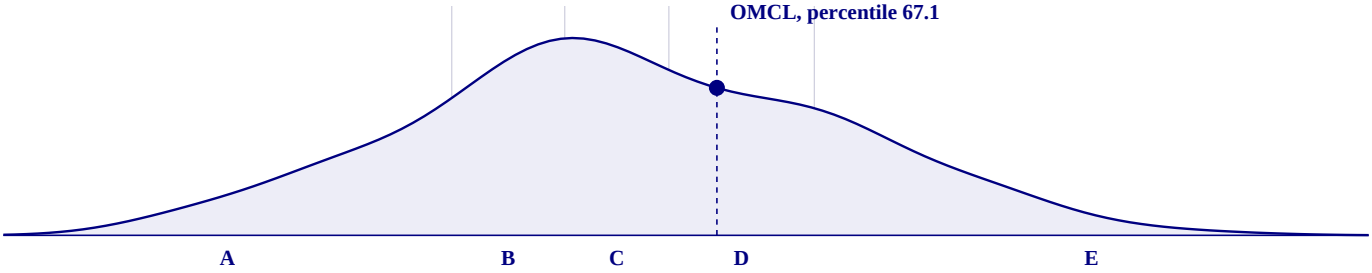
Warnings

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

Check	Measured
Fortress balance sheet	cash minus debt is 77,210,000 USD; Altman Z is not used

Among 469 peers

business equipment; 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
310	ClearSign Technologies Corp. (CLIR)	66.0	D	
311	Analog Devices Inc. (ADI)	66.2	D	
312	Ichor Holdings, Ltd. (ICHR)	66.5	D	
313	Shutterstock, Inc. (SSTK)	66.7	D	
314	PubMatic, Inc. (PUBM)	66.9	D	
315	Omnicell, Inc. (OMCL)	67.1	D	fortress balance sheet
316	Franklin Wireless Corp. (FKWL)	67.3	D	
317	Viavi Solutions Inc. (VIAV)	67.5	D	fortress balance sheet
318	Allegro Microsystems, Inc. (ALGM)	67.7	D	
319	Brightline Interactive, Inc./NV (BTLN)	67.9	D	
320	HP Inc. (HPQ)	68.2	D	

What the price implies

at the 2026-11-20 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	1.4%	(2.2%)	53
Distance from 52-week high	(36.7%)	(41.7%)	58
EBIT to enterprise value	0.4%	2.0%	38

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Free cash flow yield	5.8%	3.1%	70
Book value to price	0.88	0.31	82
Sales to price	0.79	0.35	69
Composite equity issuance, five years	6.6%	4.3%	53
Relative strength against the sector, log excess return	(0.25)	(0.29)	53
Twelve-month failure probability, CHS model	not computable	0.05%	

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	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	pass
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$314.9M
Operating cash flow, four quarters	$186.2M
Months of runway	not finite
Days since last periodic filing	19 (10-Q received Nov 4, 2026)
Median daily dollar volume, 63 sessions	$17.7M

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	$503.4M	2025-12-31	2026-02-26	10-K	26-000006
2	assets	us-gaap:Assets	$2.0B	2025-12-31	2026-02-26	10-K	26-000006
3	operating income	us-gaap:OperatingIncomeLoss	$78.4M	2019-12-31	2022-02-25	10-K	22-000007
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$73.9M	2019-12-31	2022-02-25	10-K	22-000007
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$12.6M	2019-12-31	2022-02-25	10-K	22-000007
6	total debt	us-gaap:LongTermDebt	$50.0M	2019-12-31	2020-02-26	10-K	20-000010
7	book equity	us-gaap:StockholdersEquity	$845.3M	2019-12-31	2023-03-01	10-K	23-000003
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$127.2M	2019-12-31	2022-02-25	10-K	22-000007
9	net income	us-gaap:NetIncomeLoss	$2.1M	2025-12-31	2026-02-26	10-K	26-000006
10	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$127.3M	2025-12-31	2026-02-26	10-K	26-000006
11	assets	us-gaap:Assets	$2.1B	2024-12-31	2026-02-26	10-K	26-000006
12	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.2B	2025-12-31	2026-02-26	10-K	26-000006
13	gross profit	us-gaap:GrossProfit	$471.0M	2024-12-31	2026-02-26	10-K	26-000006
14	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.1B	2024-12-31	2026-02-26	10-K	26-000006
15	gross profit	us-gaap:GrossProfit	$496.8M	2023-12-31	2026-02-26	10-K	26-000006
16	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.1B	2023-12-31	2026-02-26	10-K	26-000006
17	gross profit	us-gaap:GrossProfit	$589.0M	2022-12-31	2025-02-27	10-K	25-000003
18	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.3B	2022-12-31	2025-02-27	10-K	25-000003
19	gross profit	us-gaap:GrossProfit	$554.7M	2021-12-31	2024-02-28	10-K	24-000008
20	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.1B	2021-12-31	2024-02-28	10-K	24-000008
21	current assets	us-gaap:AssetsCurrent	$680.1M	2025-12-31	2026-02-26	10-K	26-000006
22	current liabilities	us-gaap:LiabilitiesCurrent	$476.6M	2025-12-31	2026-02-26	10-K	26-000006
23	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$384.9M	2025-12-31	2026-02-26	10-K	26-000006
24	operating income	us-gaap:OperatingIncomeLoss	$5.2M	2025-12-31	2026-02-26	10-K	26-000006

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25	book equity	us-gaap:StockholdersEquity	$1.2B	2025-12-31	2026-02-26	10-K	26-000006
26	liabilities	us-gaap:Liabilities	$742.9M	2025-12-31	2026-02-26	10-K	26-000006
27	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$53.6M	2019-12-31	2022-02-25	10-K	22-000007
28	operating income	us-gaap:OperatingIncomeLoss	$16.2M	2011-12-31	2014-03-17	10-K	14-000005
29	interest expense	us-gaap:InterestExpense	$62,000	2011-12-31	2012-03-08	10-K	12-002283
30	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$40.4M	2025-12-31	2026-02-26	10-K	26-000006
31	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$187.7M	2024-12-31	2026-02-26	10-K	26-000006
32	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$36.5M	2024-12-31	2026-02-26	10-K	26-000006
33	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$181.1M	2023-12-31	2026-02-26	10-K	26-000006
34	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$41.5M	2023-12-31	2026-02-26	10-K	26-000006
35	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$77.8M	2022-12-31	2025-02-27	10-K	25-000003
36	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$47.5M	2022-12-31	2025-02-27	10-K	25-000003
37	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$78.8M	2025-12-31	2026-02-26	10-K	26-000006
38	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$11.3M	2025-12-31	2026-02-26	10-K	26-000006
39	income tax	us-gaap:IncomeTaxExpenseBenefit	$9.3M	2025-12-31	2026-02-26	10-K	26-000006
40	current assets	us-gaap:AssetsCurrent	$815.5M	2024-12-31	2026-02-26	10-K	26-000006
41	current liabilities	us-gaap:LiabilitiesCurrent	$595.7M	2024-12-31	2026-02-26	10-K	26-000006
42	assets	us-gaap:Assets	$2.2B	2023-12-31	2025-02-27	10-K	25-000003
43	assets	us-gaap:Assets	$2.2B	2022-12-31	2024-02-28	10-K	24-000008
44	shares outstanding	dei:EntityCommonStockSharesOutstanding	45,435,918	2026-02-18	2026-02-26	10-K	26-000006
45	shares outstanding	dei:EntityCommonStockSharesOutstanding	46,759,414	2025-02-19	2025-02-27	10-K	25-000003

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