Socket Mobile, Inc.

SCKT

Nasdaq; business equipment; SIC 3571, Electronic Computers; CIK 0000944075

E

weakest fifth of 469 graded peers in business equipment

rank 404 of 469; percentile 86.1; sampling error 2.3 points; lower is stronger

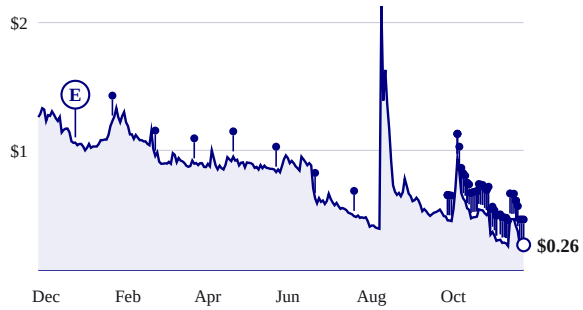
A B C D E

E, the bear



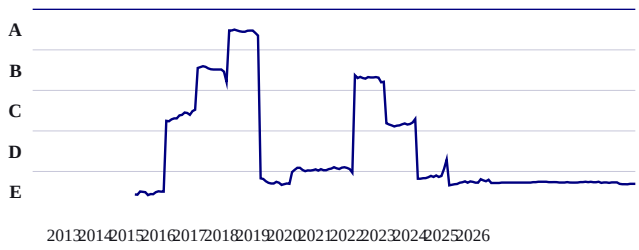
Scoreboard	
Profitability	A/B percentile 19.1
Solvency	E percentile 83.5
Growth and financing	E percentile 90.8
Reliability	0.83 AUC filers with $12.5M to $120M assets; 95% interval 0.79 to 0.86; 201 events, 2020 to 2025
Peer failure rate	1.07% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$12.5M to $120M assets total assets $14.4M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered; fortress balance sheet not computable: dilution, distress
Inputs computable	8 of 13
Graded from	filings received through Mar 30, 2026 238 days before the rescan; latest periodic filing 10-Q received Nov 12, 2026
Last close	$0.26 2026-11-18; market equity $2.1M; 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 30, 2026

solutions for enhanced productivity in workforce mobilization. Our products are incorporated into mobile applications used in point of sale (POS), commercial services (field workers), asset tracking, manufacturing process and quality control, transportation and logistics (goods tracking and movement), event management (ticketing, entry, access control, and identification), medical and education. Our primary products are cordless data capture devices incorporating barcode scanning or RFID/Near Field Communications (NFC) technologies that connect over Bluetooth.

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 19.1						
Gross profitability	51.9%	29.4%		16.2	513	2025-12-31
Return on invested capital	not computable	11.2%				
one or more required annual facts are missing						

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Accruals ratio	(62.8%)	(7.4%)	3.5	566	2025-12-31
Gross margin stability, five years	1.7 pts	2.3 pts	37.5	406	2025-12-31
Solvency, sleeve percentile 83.5					
Altman Z double-prime	(15.54)	2.18	86.2	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	(6.48x)	4.90x	82.3	80	2025-12-31
Current ratio	1.02x	1.98x	82.0	600	2025-12-31
Growth and financing, sleeve percentile 90.8					
Revenue growth, three-year compound	(10.8%)	6.6%	88.4	503	2025-12-31
Free cash flow growth, three-year compound	not computable	17.4%			
current FCF must be positive and base FCF must exceed $100,000					
Reinvestment rate	not computable	14.3%			
one or more required annual facts are missing					
Asset growth, three years	(20.4%)	5.0%	93.2	519	2025-12-31
Net share issuance, one year	not computable	0.5%			
prior share count is 721 days earlier					

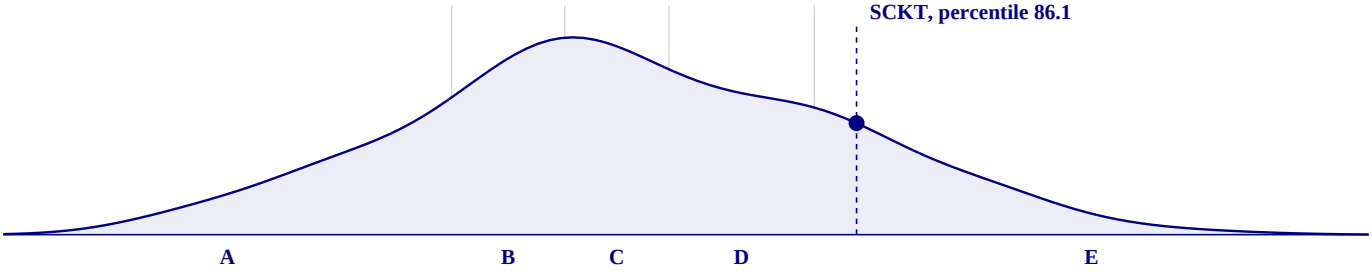
Warnings

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

Check	Measured
Fortress balance sheet	cash minus debt is 958,860 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
399	Methode Electronics Inc. (MEI)	85.0	E	
400	Marqeta, Inc. (MQ)	85.3	E	
401	Vistance Networks, Inc. (VISN)	85.5	E	
402	Revvity, Inc. (RVTY)	85.7	E	
403	Xperi Inc. (XPER)	85.9	E	fortress balance sheet
404	Socket Mobile, Inc. (SCKT)	86.1	E	fortress balance sheet
405	Magnite, Inc. (MGNI)	86.3	E	
406	Senseonics Holdings, Inc. (SENS)	86.5	E	dilution, short runway, fortress balance sheet
407	Cerence Inc. (CRNC)	86.8	E	
408	Enphase Energy, Inc. (ENPH)	87.0	E	
409	AXT Inc. (AXTI)	87.2	E	

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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	(52.7%)	(2.2%)	14
Distance from 52-week high	(87.8%)	(41.7%)	6
EBIT to enterprise value	(478.9%)	2.0%	1
Free cash flow yield	(86.1%)	3.1%	6
Book value to price	0.87	0.31	82
Sales to price	7.27	0.35	95
Composite equity issuance, five years	13.9%	4.3%	61
Relative strength against the sector, log excess return	(1.02)	(0.29)	14
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	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	fail
No new shares issued	fail
Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$1.4M
Operating cash flow, four quarters	-$219,876
Months of runway	76.6
Days since last periodic filing	11 (10-Q received Nov 12, 2026)
Median daily dollar volume, 63 sessions	$64,356

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	$7.5M	2025-12-31	2026-03-30	10-K	26-000027
2	assets	us-gaap:Assets	$14.4M	2025-12-31	2026-03-30	10-K	26-000027
3	net income	us-gaap:NetIncomeLoss	-$14.4M	2025-12-31	2026-03-30	10-K	26-000027
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$1.2M	2025-12-31	2026-03-30	10-K	26-000027
5	assets	us-gaap:Assets	$27.3M	2024-12-31	2026-03-30	10-K	26-000027
6	revenue	us-gaap:Revenues	$15.1M	2025-12-31	2026-03-30	10-K	26-000027
7	gross profit	us-gaap:GrossProfit	$9.5M	2024-12-31	2026-03-30	10-K	26-000027
8	revenue	us-gaap:Revenues	$18.8M	2024-12-31	2026-03-30	10-K	26-000027
9	gross profit	us-gaap:GrossProfit	$8.5M	2023-12-31	2025-03-25	10-K	25-000013
10	revenue	us-gaap:Revenues	$17.0M	2023-12-31	2025-03-25	10-K	25-000013
11	gross profit	us-gaap:GrossProfit	$10.4M	2022-12-31	2024-03-25	10-K	24-000015
12	revenue	us-gaap:Revenues	$21.2M	2022-12-31	2024-03-25	10-K	24-000015
13	gross profit	us-gaap:GrossProfit	$12.4M	2021-12-31	2023-03-31	10-K	23-000025
14	revenue	us-gaap:Revenues	$23.2M	2021-12-31	2023-03-31	10-K	23-000025
15	current assets	us-gaap:AssetsCurrent	$8.6M	2025-12-31	2026-03-30	10-K	26-000027
16	current liabilities	us-gaap:LiabilitiesCurrent	$8.4M	2025-12-31	2026-03-30	10-K	26-000027
17	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$64.6M	2025-12-31	2026-03-30	10-K	26-000027

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18	operating income	us-gaap:OperatingIncomeLoss	-$3.2M	2025-12-31	2026-03-30	10-K	26-000027
19	book equity	us-gaap:StockholdersEquity	$4.3M	2025-12-31	2026-03-30	10-K	26-000027
20	liabilities	us-gaap:Liabilities	$10.2M	2025-12-31	2026-03-30	10-K	26-000027
21	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$0	2019-12-31	2020-03-26	10-K	20-000012
22	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$958,860	2019-12-31	2022-03-31	10-K	22-000022
23	operating income	us-gaap:OperatingIncomeLoss	$606,370	2019-12-31	2021-03-23	10-K	21-000026
24	depreciation amortization	us-gaap:Depreciation	$419,856	2019-12-31	2021-03-23	10-K	21-000026
25	interest expense	us-gaap:InterestExpense	-$496,587	2025-12-31	2026-03-30	10-K	26-000027
26	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$537,135	2025-12-31	2026-03-30	10-K	26-000027
27	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$521,485	2024-12-31	2026-03-30	10-K	26-000027
28	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$788,325	2024-12-31	2026-03-30	10-K	26-000027
29	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$48,562	2023-12-31	2025-03-25	10-K	25-000013
30	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$2.2M	2023-12-31	2025-03-25	10-K	25-000013
31	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$111,415	2022-12-31	2024-03-25	10-K	24-000015
32	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$1.2M	2022-12-31	2024-03-25	10-K	24-000015
33	assets	us-gaap:Assets	$28.7M	2023-12-31	2025-03-25	10-K	25-000013
34	assets	us-gaap:Assets	$28.6M	2022-12-31	2024-03-25	10-K	24-000015
35	shares outstanding	dei:EntityCommonStockSharesOutstanding	8,222,958	2026-03-13	2026-03-30	10-K	26-000027
36	shares outstanding	dei:EntityCommonStockSharesOutstanding	7,547,327	2024-03-22	2024-03-25	10-K	24-000015

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