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

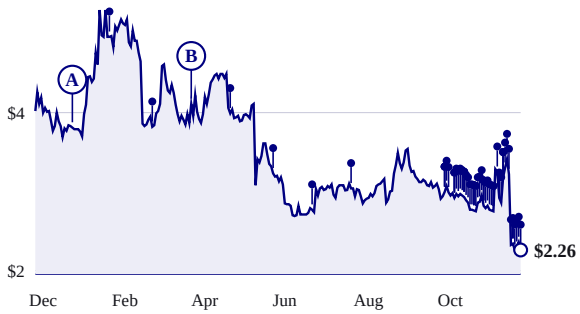
A B C D E

B, the elk



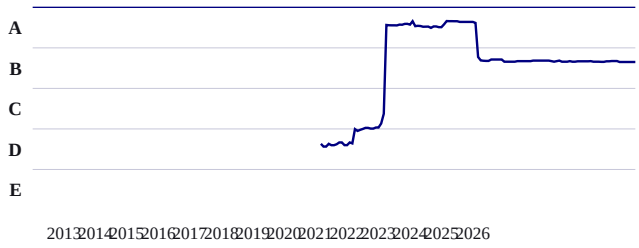
Scoreboard	
Profitability	C/D percentile 57.5
Solvency	A percentile 11.7
Growth and financing	C percentile 51.7
Reliability	0.83 AUC filers with $12.5M to $120M assets; 95% interval 0.79 to 0.86; 201 events, 2020 to 2025
Peer failure rate	1.07% a year Item 1.03 bankruptcies, same asset band, 2012 to 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 264 days before the rescan; latest periodic filing 10-Q received Nov 13, 2026
Last close	$2.23 2026-11-20; market equity $36.7M; 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

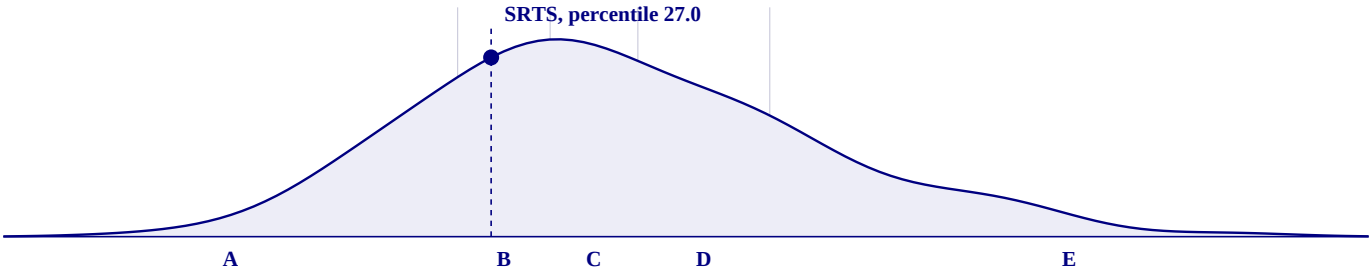
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 57.5						
Gross profitability	22.4%	32.8%		60.6	346	2025-12-31
Return on invested capital	not computable	9.6%				
one or more required annual facts are missing						

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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%	11.0	626	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 2026-11-20 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	(57.4%)	(33.0%)	30
EBIT to enterprise value	not computable	0.5%	
Free cash flow yield	0.9%	0.6%	52
Book value to price	0.95	0.29	83
Sales to price	0.74	0.38	69

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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	10 (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

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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

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