

Capricor Therapeutics, Inc. (CAPR)

Nasdaq; healthcare; SIC 2834, Pharmaceutical Preparations; CIK 0001133869

Capricor Therapeutics, Inc. CAPR; healthcare		
Grade	None 5 of 14 inputs computable; 7 are required	Share price, twelve months to the rescansplit-adjusted close; the letter is fixed at the rescans that set it 
Reliability	0.87 AUC filers with \$120M to \$591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025	
Peer failure rate	1.03% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025	
Size band	\$120M to \$591M assets total assets \$355.9M	
Standard universe	outside revenue above \$1M and assets above \$10M	
Warnings	dilution, short runway, thin data, degenerate inputs not computable: distress, fortress balance sheet	
Inputs computable	5 of 14	
Graded from	filings received through Mar 17, 2026 206 days before the rescans; latest periodic filing 10-Q received Aug 14, 2026	
Last close	\$8.01 2026-10-08; market equity \$465.4M	
Price used in grade	None	

Letter at every rescans

Jan 21, 2012 to Oct 9, 2026; sector percentile, stronger toward the top; facts filed by each date only

A	
B	
C	
D	
E	
	20132014201520162017201820192020202120222023202420252026

Business, in the company's words

opening of Item 1 of the 10-K received Mar 17, 2026

Capricor Therapeutics, Inc. is a biotechnology company focused on the development and potential commercialization of cell and exosome-based therapeutics for the treatment of Duchenne muscular dystrophy ("DMD"), a rare genetic disorder characterized by progressive muscle degeneration and premature death, as well as other diseases with significant unmet medical need.

The fourteen inputs

lower percentile is stronger; equal-weighted sleeves

Input	Percentile, 0 to 100	Value	Peer median	Percentile	Peers	Period end
Profitability, sleeve percentile 33.0						
Gross profitability		not computable	32.2%		one or more required annual facts are missing	

Return on invested capital		not computable	9.3%			one or more required annual facts are missing
Accruals ratio		(13.4%)	(6.6%)	33.0	811	2025-12-31
Gross margin stability, five years		not computable	2.8 pts			five annual gross margins are required; found 0
Solvency, sleeve percentile 16.8						
Twelve-month failure probability		not computable	0.07%			latest liabilities, cash plus short-term investments, book equity, and shares are required
Altman Z double-prime		6.86	(0.31)	14.7	756	2025-12-31
Net debt to EBITDA		not computable	1.82x			one or more required annual facts are missing
Interest coverage		not computable	(4.51x)			interest expense must exceed \$100,000
Current ratio		9.01x	2.96x	19.0	839	2025-12-31
Growth and financing, sleeve percentile 34.1						
Revenue growth, three-year compound		not computable	10.0%			current value must be positive and the base must exceed \$100,000
Free cash flow growth, three-year compound		not computable	10.9%			current FCF must be positive and base FCF must exceed \$100,000
Reinvestment rate		not computable	37.1%			pretax income must exceed the validity floor and imply a 0%-100% tax rate
Asset growth, three years		92.2%	2.1%	2.6	704	2025-12-31
Net share issuance, one year		25.9%	2.5%	65.7	634	2026-03-16

Warnings

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

Check	Measured
Dilution	split-adjusted year-over-year share growth is 25.9%
Short runway	cash runway is 2.4 months
Thin data	5 of 14 grade factors are computable; minimum is 7

What the price implies

at the 2026-10-08 close; none enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	37.4%	8.0%	70
Distance from 52-week high	(77.3%)	(31.4%)	9
EBIT to enterprise value	not computable	(1.5%)	
Free cash flow yield	(15.6%)	(1.0%)	25
Book value to price	0.53	0.28	71
Sales to price	0.00	0.31	0
Composite equity issuance, five years	93.6%	20.3%	77
Relative strength against the sector, log excess return	0.11	(0.14)	70

Diagnostics

not in 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	fail
Cash, filings, liquidity	
Cash and equivalents	\$20.9M
Operating cash flow, four quarters	-\$104.0M
Months of runway	2.4
Days since last periodic filing	56 (10-Q received Aug 14, 2026)
Median daily dollar volume, 63 sessions	\$27.9M

Sources

each row links to the filing index on sec.gov

#	Concept	XBRL tag	Value	Period end	Received	Form	Accession
1	net income	us-gaap:NetIncomeLoss	-\$105.0M	2025-12-31	2026-03-17	10-K	0001104659-26-029580
2	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-\$69.8M	2025-12-31	2026-03-17	10-K	0001104659-26-029580
3	assets	us-gaap:Assets	\$355.9M	2025-12-31	2026-03-17	10-K	0001104659-26-029580
4	assets	us-gaap:Assets	\$170.5M	2024-12-31	2026-03-17	10-K	0001104659-26-029580
5	current assets	us-gaap:AssetsCurrent	\$322.9M	2025-12-31	2026-03-17	10-K	0001104659-26-029580
6	current liabilities	us-gaap:LiabilitiesCurrent	\$35.8M	2025-12-31	2026-03-17	10-K	0001104659-26-029580
7	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-\$304.9M	2025-12-31	2026-03-17	10-K	0001104659-26-029580
8	operating income	us-gaap:OperatingIncomeLoss	-\$108.1M	2025-12-31	2026-03-17	10-K	0001104659-26-029580
9	book equity	us-gaap:StockholdersEquity	\$305.8M	2025-12-31	2026-03-17	10-K	0001104659-26-029580
10	liabilities	us-gaap:Liabilities	\$50.2M	2025-12-31	2026-03-17	10-K	0001104659-26-029580
11	operating income	us-gaap:OperatingIncomeLoss	-\$15.3M	2018-12-31	2020-03-27	10-K	0001104659-20-039272
12	interest expense	us-gaap:InterestExpense	\$0	2018-12-31	2019-03-29	10-K	0001144204-19-016787
13	revenue	us-gaap:Revenues	\$0	2025-12-31	2026-03-17	10-K	0001104659-26-029580
14	revenue	us-gaap:Revenues	\$22.3M	2024-12-31	2026-03-17	10-K	0001104659-26-029580
15	revenue	us-gaap:Revenues	\$25.2M	2023-12-31	2025-03-26	10-K	0001558370-25-003707
16	revenue	us-gaap:Revenues	\$2.6M	2022-12-31	2024-03-11	10-K	0001558370-24-002861
17	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$2.9M	2025-12-31	2026-03-17	10-K	0001104659-26-029580
18	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-\$40.0M	2024-12-31	2026-03-17	10-K	0001104659-26-029580
19	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$1.2M	2024-12-31	2026-03-17	10-K	0001104659-26-029580
20	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-\$25.6M	2023-12-31	2025-03-26	10-K	0001558370-25-003707
21	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$1.3M	2023-12-31	2025-03-26	10-K	0001558370-25-003707

22	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$4.9M	2022-12-31	2024-03-11	10-K	0001558370-24-002861
23	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$2.0M	2022-12-31	2024-03-11	10-K	0001558370-24-002861
24	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	\$1.9M	2025-12-31	2026-03-17	10-K	0001104659-26-029580
25	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraordinaryItemsDeductibleItems	\$105.0M	2025-12-31	2026-03-17	10-K	0001104659-26-029580
26	income tax	us-gaap:IncomeTaxExpenseBenefit	\$1,600	2025-12-31	2026-03-17	10-K	0001104659-26-029580
27	current assets	us-gaap:AssetsCurrent	\$163.4M	2024-12-31	2026-03-17	10-K	0001104659-26-029580
28	current liabilities	us-gaap:LiabilitiesCurrent	\$21.0M	2024-12-31	2026-03-17	10-K	0001104659-26-029580
29	assets	us-gaap:Assets	\$58.7M	2023-12-31	2025-03-26	10-K	0001558370-25-003707
30	assets	us-gaap:Assets	\$50.1M	2022-12-31	2024-03-11	10-K	0001558370-24-002861
31	shares outstanding	dei:EntityCommonStockSharesOutstanding	57,510,635	2026-03-16	2026-03-17	10-K	0001104659-26-029580
32	shares outstanding	dei:EntityCommonStockSharesOutstanding	45,676,202	2025-03-24	2025-03-26	10-K	0001558370-25-003707