

Intelligent BIO Solutions Inc. (INBS)

Nasdaq; healthcare; SIC 3841, Surgical & Medical Instruments & Apparatus; CIK 0001725430

[illegible]

Letter at every rescans

Jan 21, 2012 to Oct 9, 2026; sector percentile, 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 Aug 19, 2026

context otherwise requires, the terms "we," "us," "our," "Company," or "INBS" refer to Intelligent Bio Solutions Inc. together with its wholly owned subsidiaries. Bio Solutions Inc. and its wholly owned Delaware subsidiary, GBS Operations Inc., were each formed on December 5, 2016, under the laws of the state of Delaware. The Company's Australian subsidiary, Intelligent Bio Solutions (APAC) Pty Ltd, was formed on August 4, 2016, under the laws of New South Wales, Australia. On October 4, 2022, INBS acquired

Intelligent Fingerprinting Limited ("IFP"), a company registered in England Bio Solutions Inc.

The fourteen inputs

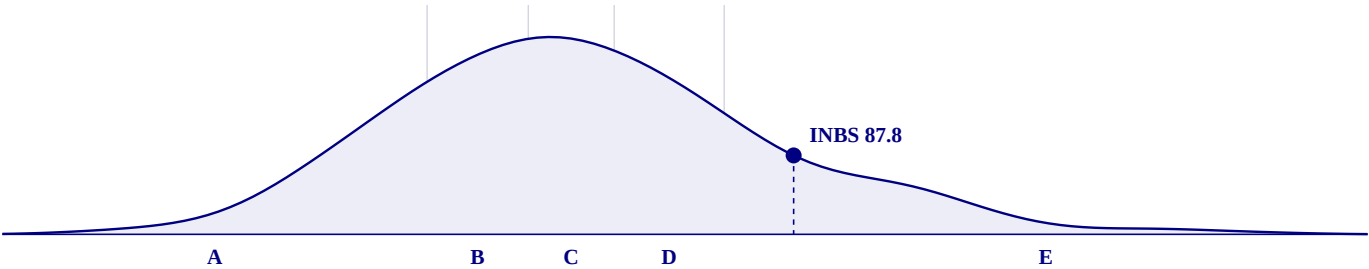
lower percentile is stronger; equal-weighted sleeves

Input	Percentile, 0 to 100	Value	Peer median	Percentile	Peers	Period end
Profitability, sleeve percentile 64.2						
Gross profitability		17.2%	32.2%	67.1	372	2026-06-30
Return on invested capital		not computable	9.3%			one or more required annual facts are missing
Accruals ratio		(5.0%)	(6.6%)	61.2	811	2026-06-30
Gross margin stability, five years		not computable	2.8 pts			five annual gross margins are required; found 4
Solvency, sleeve percentile 79.9						
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		(25.50)	(0.31)	77.7	756	2026-06-30
Net debt to EBITDA		not computable	1.82x			required facts have no common fiscal period end
Interest coverage		not computable	(4.51x)			one or more required annual facts are missing
Current ratio		1.44x	2.96x	82.1	839	2026-06-30
Growth and financing, sleeve percentile 48.5						
Revenue growth, three-year compound		49.7%	10.0%	13.8	415	2026-06-30
Free cash flow growth, three-year compound		not computable	10.9%			four consecutive annual FCF observations are required; found 3
Reinvestment rate		not computable	37.1%			one or more required annual facts are missing
Asset growth, three years		4.9%	2.1%	41.1	704	2026-06-30
Net share issuance, one year		237.2%	2.5%	90.5	634	2026-08-18

Warnings

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

Check	Measured
Dilution	split-adjusted year-over-year share growth is 237.2%
Short runway	cash runway is 4.0 months



Composite score of every graded peer, smoothed; vertical rules are the letter band edges; stronger to the left.

Rank	Company	Percentile	Letter	Warnings
321	Natural Alternatives International Inc. (NAII)	86.5	E	dilution, late filer, fortress balance sheet
322	DarioHealth Corp. (DRIO)	86.8	E	dilution, short runway
323	Intellia Therapeutics, Inc. (NTLA)	87.0	E	short runway
324	Heron Therapeutics, Inc. (HRTX)	87.3	E	distress
325	Lexaria Bioscience Corp. (LEXX)	87.6	E	dilution, short runway, distress
326	Intelligent BIO Solutions Inc. (INBS) <	87.8	E	dilution, short runway
327	Bristol Myers Squibb Co. (BMY)	88.2	E	
328	Bristol Myers Squibb Co. (CELG-RI)	88.2	E	
329	Maravai Lifesciences Holdings, Inc. (MRVI)	88.6	E	late filer
330	Insight Molecular Diagnostics Inc. (IMDX)	88.9	E	fortress balance sheet
331	Nuwellis, Inc. (NUWE)	89.2	E	dilution, short runway, fortress balance sheet

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	(76.5%)	8.0%	4
Distance from 52-week high	(91.2%)	(31.4%)	4
EBIT to enterprise value	(523.0%)	(1.5%)	2
Free cash flow yield	(253.6%)	(1.0%)	3
Book value to price	1.16	0.28	89
Sales to price	0.89	0.31	79
Composite equity issuance, five years	619.1%	20.3%	98
Relative strength against the sector, log excess return	(1.66)	(0.14)	4

Diagnostics

not in the grade

Measure	Value
Piotroski F-score None of 9, period end 2026-06-30	
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	pass
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	\$4.0M
Operating cash flow, four quarters	-\$11.9M
Months of runway	4.0
Days since last periodic filing	51 (10-K received Aug 19, 2026)
Median daily dollar volume, 63 sessions	\$94,055

Sources

each row links to the filing index on sec.gov

#	Concept	XBRL tag	Value	Period end	Received	Form	Accession
1	gross profit	us-gaap:GrossProfit	\$2.0M	2026-06-30	2026-08-19	10-K	0001493152-26-039136
2	assets	us-gaap:Assets	\$11.9M	2026-06-30	2026-08-19	10-K	0001493152-26-039136
3	net income	us-gaap:NetIncomeLoss	-\$12.4M	2026-06-30	2026-08-19	10-K	0001493152-26-039136
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-\$11.9M	2026-06-30	2026-08-19	10-K	0001493152-26-039136
5	assets	us-gaap:Assets	\$8.2M	2025-06-30	2026-08-19	10-K	0001493152-26-039136
6	current assets	us-gaap:AssetsCurrent	\$7.1M	2026-06-30	2026-08-19	10-K	0001493152-26-039136
7	current liabilities	us-gaap:LiabilitiesCurrent	\$4.9M	2026-06-30	2026-08-19	10-K	0001493152-26-039136
8	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-\$75.0M	2026-06-30	2026-08-19	10-K	0001493152-26-039136
9	operating income	us-gaap:OperatingIncomeLoss	-\$12.6M	2026-06-30	2026-08-19	10-K	0001493152-26-039136
10	book equity	us-gaap:StockholdersEquity	\$5.5M	2026-06-30	2026-08-19	10-K	0001493152-26-039136
11	liabilities	us-gaap:Liabilities	\$6.7M	2026-06-30	2026-08-19	10-K	0001493152-26-039136
12	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$4.2M	2026-06-30	2026-08-19	10-K	0001493152-26-039136
13	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$3.1M	2025-06-30	2026-08-19	10-K	0001493152-26-039136
14	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$3.1M	2024-06-30	2025-08-15	10-K	0001641172-25-024279
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$1.3M	2023-06-30	2024-09-18	10-K	0001493152-24-036953
16	assets	us-gaap:Assets	\$13.8M	2024-06-30	2025-08-15	10-K	0001641172-25-024279
17	assets	us-gaap:Assets	\$10.4M	2023-06-30	2024-09-18	10-K	0001493152-24-036953
18	shares outstanding	dei:EntityCommonStockSharesOutstanding	3,027,470	2026-08-18	2026-08-19	10-K	0001493152-26-039136
19	shares outstanding	dei:EntityCommonStockSharesOutstanding	8,979,152	2025-08-12	2025-08-15	10-K	0001641172-25-024279