

Nexentis Technologies Inc. (NXTS)

Nasdaq; healthcare; SIC 2834, Pharmaceutical Preparations; CIK 0001789192

Nexentis Technologies Inc. NXTS; healthcare		
Grade	None 6 of 14 inputs computable; 7 are required	Share price, twelve months to the rescan split-adjusted close; the letter is fixed at the rescan that set it Rescans on file: D from Apr 21, 2024, C/D from Dec 21, 2024, D from Mar 21, 2025, E from Apr 21, 2025
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 \$20.4M	
Standard universe	outside revenue above \$1M and assets above \$10M	
Warnings	dilution, thin data, distress; fortress balance sheet	
Inputs computable	6 of 14	
Graded from	filings received through Mar 31, 2026 192 days before the rescan; latest periodic filing 10-Q received Aug 13, 2026	
Last close	\$0.90 2026-10-08; market equity \$1.3M	
Price used in grade	None	

Letter at every rescan

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 Mar 31, 2026

were incorporated in the State of Delaware on April 1, 2009 under the name Pimi Agro Cleantech, Inc. On April 11, 2016, we changed our name from Pimi Agro Cleantech, Inc. to Save Foods, Inc., on March 19, 2024 we changed our name to N2OFF, Inc., and on February 26, 2026, we changed our name to Nexentis Technologies 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 77.9						
Gross profitability		not computable	32.2%			latest aligned inputs end 2024-12-31; latest annual assets end 2025-12-31

Return on invested capital		not computable	9.3%			required facts have no common fiscal period end
Accruals ratio		(1.5%)	(6.6%)	77.9	811	2025-12-31
Gross margin stability, five years		not computable	2.8 pts			latest aligned inputs end 2024-12-31; latest annual assets end 2025-12-31
Solvency, sleeve percentile 63.5						
Twelve-month failure probability		17.39%	0.07%	99.2	248	2026-06-30
Altman Z double-prime		(2.48)	(0.31)	47.4	756	2025-12-31
Net debt to EBITDA		not computable	1.82x			EBITDA must exceed \$100,000 interest expense must exceed \$100,000
Interest coverage		not computable	(4.51x)			
Current ratio		4.19x	2.96x	43.8	839	2025-12-31
Growth and financing, sleeve percentile 52.5						
Revenue growth, three-year compound		not computable	10.0%			latest aligned inputs end 2024-12-31; latest annual assets end 2025-12-31
Free cash flow growth, three-year compound		not computable	10.9%			four consecutive annual FCF observations are required; found 4
Reinvestment rate		not computable	37.1%			NOPAT must exceed \$100,000
Asset growth, three years		46.5%	2.1%	8.8	704	2025-12-31
Net share issuance, one year		904.3%	2.5%	96.2	634	2026-03-31

Warnings

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

Check	Measured
Dilution	split-adjusted year-over-year share growth is 904.3%
Thin data	6 of 14 grade factors are computable; minimum is 7
Distress	CHS probability 17.392299%; universe top-decile threshold 1.068854%
Fortress balance sheet	cash minus debt is 6,742,548 USD; Altman Z is not used

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	(93.1%)	8.0%	1
Distance from 52-week high	(97.2%)	(31.4%)	1
EBIT to enterprise value	not computable	(1.5%)	
Free cash flow yield	(297.6%)	(1.0%)	3

Book value to price	1.48	0.28	94
Sales to price	0.16	0.31	36
Composite equity issuance, five years	not computable	20.3%	
Relative strength against the sector, log excess return	(2.88)	(0.14)	1

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	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	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	\$7.6M
Operating cash flow, four quarters	-\$4.4M
Months of runway	20.7
Days since last periodic filing	57 (10-Q received Aug 13, 2026)
Median daily dollar volume, 63 sessions	\$34,166

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	\$45,000	2024-12-31	2025-03-31	10-K	0001641172-25-001513
2	assets	us-gaap:Assets	\$5.5M	2024-12-31	2026-03-31	10-K	0001493152-26-014183
3	net income	us-gaap:NetIncomeLoss	-\$4.0M	2025-12-31	2026-03-31	10-K	0001493152-26-014183
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-\$3.8M	2025-12-31	2026-03-31	10-K	0001493152-26-014183
5	assets	us-gaap:Assets	\$20.4M	2025-12-31	2026-03-31	10-K	0001493152-26-014183
6	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$210,000	2024-12-31	2025-03-31	10-K	0001641172-25-001513
7	gross profit	us-gaap:GrossProfit	\$208,000	2023-12-31	2025-03-31	10-K	0001641172-25-001513
8	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$263,000	2023-12-31	2025-03-31	10-K	0001641172-25-001513
9	gross profit	us-gaap:GrossProfit	\$235,691	2022-12-31	2024-04-01	10-K	0001493152-24-012356
10	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$394,004	2022-12-31	2024-04-01	10-K	0001493152-24-012356
11	gross profit	us-gaap:GrossProfit	\$302,198	2021-12-31	2023-03-27	10-K	0001493152-23-009116
12	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$438,141	2021-12-31	2023-03-27	10-K	0001493152-23-009116
13	gross profit	us-gaap:GrossProfit	\$188,869	2020-12-31	2022-03-31	10-K	0001493152-22-008526
14	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$232,274	2020-12-31	2022-03-31	10-K	0001493152-22-008526
15	current assets	us-gaap:AssetsCurrent	\$6.0M	2025-12-31	2026-03-31	10-K	0001493152-26-014183
16	current liabilities	us-gaap:LiabilitiesCurrent	\$1.4M	2025-12-31	2026-03-31	10-K	0001493152-26-014183
17	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-\$38.6M	2025-12-31	2026-03-31	10-K	0001493152-26-014183
18	operating income	us-gaap:OperatingIncomeLoss	-\$4.2M	2025-12-31	2026-03-31	10-K	0001493152-26-014183
19	book equity	us-gaap:StockholdersEquity	\$16.0M	2025-12-31	2026-03-31	10-K	0001493152-26-014183
20	liabilities	us-gaap:Liabilities	\$4.7M	2025-12-31	2026-03-31	10-K	0001493152-26-014183
21	total debt	us-gaap:LongTermDebt	\$8,390	2021-12-31	2022-03-31	10-K	0001493152-22-008526
22	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$6.8M	2021-12-31	2023-03-27	10-K	0001493152-23-009116
23	operating income	us-gaap:OperatingIncomeLoss	-\$4.7M	2021-12-31	2023-03-27	10-K	0001493152-23-009116
24	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	\$57,195	2021-12-31	2022-03-31	10-K	0001493152-22-008526
25	operating income	us-gaap:OperatingIncomeLoss	-\$3.3M	2024-12-31	2026-03-31	10-K	0001493152-26-014183
26	interest expense	us-gaap:InterestExpense	\$16	2024-12-31	2025-03-31	10-K	0001641172-25-001513
27	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$14,000	2025-12-31	2026-03-31	10-K	0001493152-26-014183
28	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	\$71,000	2025-12-31	2026-03-31	10-K	0001493152-26-014183
29	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraord	\$3.6M	2025-12-31	2026-03-31	10-K	0001493152-26-014183
30	income tax	us-gaap:IncomeTaxExpenseBenefit	-\$18,000	2025-12-31	2026-03-31	10-K	0001493152-26-014183
31	current assets	us-gaap:AssetsCurrent	\$3.5M	2024-12-31	2026-03-31	10-K	0001493152-26-014183

32	current liabilities	us-gaap:LiabilitiesCurrent	\$892,000	2024-12-31	2026-03-31	10-K	0001493152-26-014183
33	assets	us-gaap:Assets	\$7.2M	2023-12-31	2025-03-31	10-K	0001641172-25-001513
34	assets	us-gaap:Assets	\$6.5M	2022-12-31	2024-04-01	10-K	0001493152-24-012356
35	shares outstanding	dei:EntityCommonStockSharesOutstanding	5,111,362	2026-03-31	2026-03-31	10-K	0001493152-26-014183
36	shares outstanding	dei:EntityCommonStockSharesOutstanding	17,812,404	2025-03-31	2025-03-31	10-K	0001641172-25-001513