

OnKure Therapeutics, Inc. (OKUR)

Nasdaq; healthcare; SIC 2834, Pharmaceutical Preparations; CIK 0001637715

OnKure Therapeutics, Inc. OKUR; healthcare		
Grade	None 4 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 
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 \$62.1M	
Standard universe	outside revenue above \$1M and assets above \$10M	
Warnings	thin data, degenerate inputs not computable: dilution, distress, fortress balance sheet	
Inputs computable	4 of 14	
Graded from	filings received through Mar 12, 2026 211 days before the rescan; latest periodic filing 10-Q received Aug 4, 2026	
Last close	\$2.29 2026-10-08; market equity \$92.7M	
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

A	
B	
C	
D	
E	
	20132014201520162017201820192020202120222023202420252026

Business, in the company's words

opening of Item 1 of the 10-K received Mar 12, 2026

OnKure Therapeutics, Inc. ("OnKure", "we", "us" or the "Company") is a clinical-stage biopharmaceutical company focused on the discovery and development of precision medicines that target biologically validated drivers of cancers and other diseases that are underserved by available therapies. Using a structure-based drug design platform, we are committed to improving clinical outcomes for patients by building a pipeline of small molecule drugs designed to achieve optimal efficacy and tolerability by selectively targeting specific mutations shown to be key drivers of cancer and other diseases.

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 45.2						
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		(8.7%)	(6.6%)	45.2	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 30.9						
Twelve-month failure probability		not computable	0.07%			liabilities and a nearby cover-page share count are required at 2025-12-31
Altman Z double-prime		(2.31)	(0.31)	46.4	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)			one or more required annual facts are missing
Current ratio		10.28x	2.96x	15.5	839	2025-12-31
Growth and financing, sleeve percentile 78.5						
Revenue growth, three-year compound		not computable	10.0%			four annual observations are required; found 1
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%			NOPAT must exceed \$100,000
Asset growth, three years		(16.9%)	2.1%	78.5	704	2025-12-31
Net share issuance, one year		not computable	2.5%			prior share count is 686 days earlier

Warnings

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

Check	Measured
Thin data	4 of 14 grade factors are computable; minimum is 7
Degenerate inputs	latest revenue or assets are at or below the \$100,000 validity floor

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	32.0%	8.0%	67
Distance from 52-week high	(56.4%)	(31.4%)	20

EBIT to enterprise value	not computable	(1.5%)	
Free cash flow yield	(55.7%)	(1.0%)	11
Book value to price	1.85	0.28	95
Sales to price	0.00	0.31	0
Composite equity issuance, five years	not computable	20.3%	
Relative strength against the sector, log excess return	0.07	(0.14)	67

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	fail
No new shares issued	fail
Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	\$166.5M
Operating cash flow, four quarters	-\$47.8M
Months of runway	41.8
Days since last periodic filing	66 (10-Q received Aug 4, 2026)
Median daily dollar volume, 63 sessions	\$501,338

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	-\$59.5M	2025-12-31	2026-03-12	10-K	0001193125-26-104147
2	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-\$51.8M	2025-12-31	2026-03-12	10-K	0001193125-26-104147
3	assets	us-gaap:Assets	\$62.1M	2025-12-31	2026-03-12	10-K	0001193125-26-104147
4	assets	us-gaap:Assets	\$114.9M	2024-12-31	2026-03-12	10-K	0001193125-26-104147
5	current assets	us-gaap:AssetsCurrent	\$60.8M	2025-12-31	2026-03-12	10-K	0001193125-26-104147
6	current liabilities	us-gaap:LiabilitiesCurrent	\$5.9M	2025-12-31	2026-03-12	10-K	0001193125-26-104147
7	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-\$214.2M	2025-12-31	2026-03-12	10-K	0001193125-26-104147
8	operating income	us-gaap:OperatingIncomeLoss	-\$63.0M	2025-12-31	2026-03-12	10-K	0001193125-26-104147
9	book equity	us-gaap:StockholdersEquity	\$56.2M	2025-12-31	2026-03-12	10-K	0001193125-26-104147
10	liabilities	us-gaap:Liabilities	\$5.9M	2025-12-31	2026-03-12	10-K	0001193125-26-104147
11	revenue	us-gaap:Revenues	\$0	2024-12-31	2025-03-10	10-K	0000950170-25-036252
12	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$46,000	2025-12-31	2026-03-12	10-K	0001193125-26-104147
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-\$51.1M	2024-12-31	2026-03-12	10-K	0001193125-26-104147
14	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$52,000	2024-12-31	2026-03-12	10-K	0001193125-26-104147
15	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-\$34.5M	2023-12-31	2025-03-10	10-K	0000950170-25-036252
16	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$246,000	2023-12-31	2025-03-10	10-K	0000950170-25-036252
17	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-\$47.4M	2022-12-31	2024-03-28	10-K	0000950170-24-038009
18	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$346,000	2022-12-31	2024-03-28	10-K	0000950170-24-038009
19	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	\$417,000	2023-12-31	2025-03-10	10-K	0000950170-25-036252
20	operating income	us-gaap:OperatingIncomeLoss	-\$36.9M	2023-12-31	2025-03-10	10-K	0000950170-25-036252
21	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraord	\$77.4M	2023-12-31	2024-03-28	10-K	0000950170-24-038009
22	income tax	us-gaap:IncomeTaxExpenseBenefit	\$0	2023-12-31	2024-03-28	10-K	0000950170-24-038009
23	current assets	us-gaap:AssetsCurrent	\$33.8M	2023-12-31	2025-03-10	10-K	0000950170-25-036252
24	current liabilities	us-gaap:LiabilitiesCurrent	\$7.3M	2023-12-31	2025-03-10	10-K	0000950170-25-036252
25	current assets	us-gaap:AssetsCurrent	\$106.4M	2022-12-31	2024-03-28	10-K	0000950170-24-038009
26	current liabilities	us-gaap:LiabilitiesCurrent	\$7.1M	2022-12-31	2024-03-28	10-K	0000950170-24-038009
27	assets	us-gaap:Assets	\$35.7M	2023-12-31	2025-03-10	10-K	0000950170-25-036252
28	assets	us-gaap:Assets	\$108.2M	2022-12-31	2024-03-28	10-K	0000950170-24-038009
29	shares outstanding	dei:EntityCommonStockSharesOutstanding	13,673,565	2026-03-11	2026-03-12	10-K	0001193125-26-104147

