

OS Therapies Inc. (OSTX)

NYSE; healthcare; SIC 2834, Pharmaceutical Preparations; CIK 0001795091

OS Therapies Inc. OSTX; 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	0.76 AUC filers with under \$12.5M assets; 95% interval 0.65 to 0.86; 63 events, 2020 to 2025	
Peer failure rate	0.60% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025	
Size band	under \$12.5M assets total assets \$6.8M	
Warnings	dilution, late filer, thin data not computable: short runway, degenerate inputs, distress, fortress balance sheet	
Inputs computable	4 of 14	
Graded from	filings received through Mar 31, 2026 192 days before the rescan; latest periodic filing 10-Q received Aug 14, 2026	
Last close	\$1.62 2026-10-08; market equity \$74.7M	
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 31, 2026

("OS Therapies," the "Company," "we," "our" or "us") is a clinical stage biopharmaceutical company focused on the identification, development and commercialization of treatments for Osteosarcoma (OS) and other solid tumors. Our mission is to address the significant need for new treatments in cancers of the bone in children and young adults. Osteosarcoma is an extremely challenging and often aggressive cancer that has particular treatment challenges due to its location, changing genotypes and high metastases rates.

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 1.7						
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		(234.5%)	(6.6%)	1.7	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 96.1						
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		(71.73)	(0.31)	92.3	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		0.03x	2.96x	99.9	839	2025-12-31
Growth and financing, sleeve percentile 80.7						
Revenue growth, three-year compound		not computable	10.0%			four annual observations are required; found 0
Free cash flow growth, three-year compound		not computable	10.9%			four consecutive annual FCF observations are required; found 1
Reinvestment rate		not computable	37.1%			one or more required annual facts are missing
Asset growth, three years		not computable	2.1%			four annual observations are required; found 2
Net share issuance, one year		82.5%	2.5%	80.7	634	2026-03-26

Warnings

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

Check	Measured
Dilution	split-adjusted year-over-year share growth is 82.5%
Late filer	found 3 NT 10-K/Q filings in the last eight quarters
Thin data	4 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	(13.8%)	8.0%	36
Distance from 52-week high	(27.7%)	(31.4%)	56
EBIT to enterprise value	not computable	(1.5%)	
Free cash flow yield	(19.7%)	(1.0%)	23
Book value to price	(0.16)	0.28	6
Sales to price	not computable	0.31	
Composite equity issuance, five years	not computable	20.3%	
Relative strength against the sector, log excess return	(0.36)	(0.14)	36

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	fail
No new shares issued	fail
Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	n/a
Operating cash flow, four quarters	n/a
Months of runway	not finite
Days since last periodic filing	56 (10-Q received Aug 14, 2026)
Median daily dollar volume, 63 sessions	\$650,841

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	-\$28.8M	2025-12-31	2026-03-31	10-K	0001213900-26-036629
2	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-\$14.2M	2025-12-31	2026-03-31	10-K	0001213900-26-036629
3	assets	us-gaap:Assets	\$6.8M	2025-12-31	2026-03-31	10-K	0001213900-26-036629
4	assets	us-gaap:Assets	\$5.5M	2024-12-31	2026-03-31	10-K	0001213900-26-036629
5	current assets	us-gaap:AssetsCurrent	\$332,912	2025-12-31	2026-03-31	10-K	0001213900-26-036629
6	current liabilities	us-gaap:LiabilitiesCurrent	\$11.8M	2025-12-31	2026-03-31	10-K	0001213900-26-036629
7	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-\$67.2M	2025-12-31	2026-03-31	10-K	0001213900-26-036629
8	operating income	us-gaap:OperatingIncomeLoss	-\$28.7M	2025-12-31	2026-03-31	10-K	0001213900-26-036629
9	book equity	us-gaap:StockholdersEquity	-\$6.1M	2025-12-31	2026-03-31	10-K	0001213900-26-036629
10	liabilities	us-gaap:Liabilities	\$11.9M	2025-12-31	2026-03-31	10-K	0001213900-26-036629
11	shares outstanding	dei:EntityCommonStockSharesOutstanding	39,533,227	2026-03-26	2026-03-31	10-K	0001213900-26-036629
12	shares outstanding	dei:EntityCommonStockSharesOutstanding	21,663,811	2025-03-28	2025-03-31	10-K	0001213900-25-026238