

Sensus Healthcare, Inc. (SRTS)

Nasdaq; healthcare; SIC 3841, Surgical & Medical Instruments & Apparatus; CIK 0001494891

Sensus Healthcare, Inc. SRTS; healthcare	
Grade	B A B C D E second fifth of 371 graded peers percentile 26.5; sampling error 2.5 points; lower is stronger
Rank	99 of 371
Profitability	C/D percentile 57.8
Solvency	A percentile 11.2
Growth and financing	C percentile 51.8
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 \$53.0M
Standard universe	inside revenue above \$1M and assets above \$10M
Warnings	none active not computable: distress, fortress balance sheet
Inputs computable	8 of 14
Graded from	filings received through Mar 4, 2026 219 days before the rescan; latest periodic filing 10-Q received Aug 14, 2026
Last close	\$2.97 2026-10-08; market equity \$48.9M
Price used in grade	None



B, the elk
second fifth of its sector; letters are fifths of the 371 graded peers

Share price, twelve months to the rescan

split-adjusted close; the letter is fixed at the rescan that set it



Rescans on file: C/D from Apr 21, 2022, C from Feb 21, 2023, A from Apr 21, 2023, B from Mar 21, 2024

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 4, 2026

its subsidiaries, Sensus Medical Devices Ltd. and Sensus Healthcare Services, LLC, unless the context otherwise indicates, "Sensus," "we," "us," "our," or the "Company") is a medical device company committed to providing highly effective, non-invasive treatments for non-melanoma skin cancer (NMSC) and post-surgical keloid scar prevention. The Company uses a proprietary low-energy X-ray technology known as superficial radiation therapy ("SRT"), which is based on decades of dedicated research and development, and

has successfully incorporated SRT into a portfolio of treatment devices: the SRT-100™, SRT-100+™ and SRT-100 Vision™.

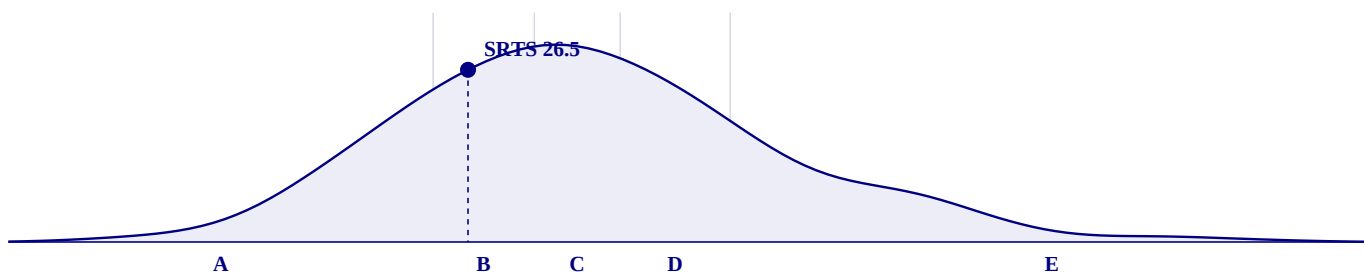
The fourteen inputs

lower percentile is stronger; equal-weighted sleeves

Input	Percentile, 0 to 100	Value	Peer median	Percentile	Peers	Period end
Profitability, sleeve percentile 57.8						
Gross profitability		22.4%	32.2%	60.1	372	2025-12-31
Return on invested capital		not computable	9.3%			one or more required annual facts are missing
Accruals ratio		(14.3%)	(6.6%)	31.5	811	2025-12-31
Gross margin stability, five years		7.9 pts	2.8 pts	81.8	243	2025-12-31
Solvency, sleeve percentile 11.2						
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		14.36	(0.31)	5.2	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)			latest aligned inputs end 2024-12-31; latest annual assets end 2025-12-31
Current ratio		9.72x	2.96x	17.3	839	2025-12-31
Growth and financing, sleeve percentile 51.8						
Revenue growth, three-year compound		(14.9%)	10.0%	87.4	415	2025-12-31
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		(2.2%)	2.1%	56.6	704	2025-12-31
Net share issuance, one year		(0.2%)	2.5%	11.4	634	2026-02-24

Among 371 peers

healthcare; letters are fifths of this list



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

Rank	Company	Percentile	Letter	Warnings
94	NeuroPace Inc. (NPCE)	25.1	B	
95	Zoetis Inc. (ZTS)	25.4	B	
96	Mirum Pharmaceuticals, Inc. (MIRM)	25.7	B	
97	Phibro Animal Health Corp. (PAHC)	25.9	B	
98	GE HealthCare Technologies Inc. (GEHC)	26.2	B	
99	Sensus Healthcare, Inc. (SRTS) <	26.5	B	
100	Lineage Cell Therapeutics, Inc. (LCTX)	26.8	B	
101	Traverse Therapeutics, Inc. (TVTX)	27.0	B	
102	Tela Bio, Inc. (TELA)	27.3	B	fortress balance sheet
103	Alphatec Holdings, Inc. (ATEC)	27.6	B	
104	Agape ATP Corp. (ATPC)	27.8	B	late filer

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	12.7%	8.0%	53
Distance from 52-week high	(44.0%)	(31.4%)	34
EBIT to enterprise value	not computable	(1.5%)	
Free cash flow yield	0.7%	(1.0%)	58
Book value to price	0.75	0.28	78
Sales to price	0.56	0.31	69
Composite equity issuance, five years	(0.1%)	20.3%	26
Relative strength against the sector, log excess return	(0.09)	(0.14)	53

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	pass
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	pass
Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	\$15.2M
Operating cash flow, four quarters	-\$6.8M
Months of runway	26.8
Days since last periodic filing	56 (10-Q received Aug 14, 2026)
Median daily dollar volume, 63 sessions	\$58,574

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	\$11.9M	2025-12-31	2026-03-04	10-K	0001753926-26-000435
2	assets	us-gaap:Assets	\$53.0M	2025-12-31	2026-03-04	10-K	0001753926-26-000435
3	net income	us-gaap:NetIncomeLoss	-\$7.7M	2025-12-31	2026-03-04	10-K	0001753926-26-000435
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$528,000	2025-12-31	2026-03-04	10-K	0001753926-26-000435
5	assets	us-gaap:Assets	\$62.2M	2024-12-31	2026-03-04	10-K	0001753926-26-000435
6	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$27.5M	2025-12-31	2026-03-04	10-K	0001753926-26-000435
7	gross profit	us-gaap:GrossProfit	\$24.4M	2024-12-31	2026-03-04	10-K	0001753926-26-000435
8	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$41.8M	2024-12-31	2026-03-04	10-K	0001753926-26-000435
9	gross profit	us-gaap:GrossProfit	\$14.1M	2023-12-31	2025-03-05	10-K	0001753926-25-000408
10	revenue	us-gaap:Revenues	\$24.4M	2023-12-31	2025-03-05	10-K	0001753926-25-000408
11	gross profit	us-gaap:GrossProfit	\$29.6M	2022-12-31	2024-03-15	10-K	0001213900-24-023093
12	revenue	us-gaap:Revenues	\$44.5M	2022-12-31	2024-03-15	10-K	0001213900-24-023093
13	gross profit	us-gaap:GrossProfit	\$17.0M	2021-12-31	2023-03-23	10-K	0001213900-23-022355
14	revenue	us-gaap:Revenues	\$27.0M	2021-12-31	2023-03-23	10-K	0001213900-23-022355
15	current assets	us-gaap:AssetsCurrent	\$45.9M	2025-12-31	2026-03-04	10-K	0001753926-26-000435
16	current liabilities	us-gaap:LiabilitiesCurrent	\$4.7M	2025-12-31	2026-03-04	10-K	0001753926-26-000435
17	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	\$5.7M	2025-12-31	2026-03-04	10-K	0001753926-26-000435
18	operating income	us-gaap:OperatingIncomeLoss	-\$10.3M	2025-12-31	2026-03-04	10-K	0001753926-26-000435
19	book equity	us-gaap:StockholdersEquity	\$48.1M	2025-12-31	2026-03-04	10-K	0001753926-26-000435
20	liabilities	us-gaap:Liabilities	\$4.9M	2025-12-31	2026-03-04	10-K	0001753926-26-000435
21	operating income	us-gaap:OperatingIncomeLoss	\$8.1M	2024-12-31	2026-03-04	10-K	0001753926-26-000435
22	interest expense	us-gaap:InterestExpense	-\$932,000	2024-12-31	2025-03-05	10-K	0001753926-25-000408
23	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$196,000	2025-12-31	2026-03-04	10-K	0001753926-26-000435
24	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-\$831,000	2024-12-31	2026-03-04	10-K	0001753926-26-000435
25	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$276,000	2024-12-31	2026-03-04	10-K	0001753926-26-000435
26	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-\$2.1M	2023-12-31	2025-03-05	10-K	0001753926-25-000408
27	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$229,000	2023-12-31	2025-03-05	10-K	0001753926-25-000408
28	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-\$1.4M	2022-12-31	2024-03-15	10-K	0001213900-24-023093
29	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$159,000	2022-12-31	2024-03-15	10-K	0001213900-24-023093
30	depreciation amortization	us-gaap:Depreciation	\$386,000	2025-12-31	2026-03-04	10-K	0001753926-26-000435
31	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraordinaryItemsDeductibleItems	-\$9.6M	2025-12-31	2026-03-04	10-K	0001753926-26-000435
32	income tax	us-gaap:IncomeTaxExpenseBenefit	-\$1.9M	2025-12-31	2026-03-04	10-K	0001753926-26-000435
33	current assets	us-gaap:AssetsCurrent	\$56.7M	2024-12-31	2026-03-04	10-K	0001753926-26-000435
34	current liabilities	us-gaap:LiabilitiesCurrent	\$5.9M	2024-12-31	2026-03-04	10-K	0001753926-26-000435
35	assets	us-gaap:Assets	\$53.7M	2023-12-31	2025-03-05	10-K	0001753926-25-000408
36	assets	us-gaap:Assets	\$56.7M	2022-12-31	2024-03-15	10-K	0001213900-24-023093
37	shares outstanding	dei:EntityCommonStockSharesOutstanding	16,462,059	2026-02-24	2026-03-04	10-K	0001753926-26-000435
38	shares outstanding	dei:EntityCommonStockSharesOutstanding	16,495,396	2025-02-12	2025-03-05	10-K	0001753926-25-000408