Riley Exploration Permian, Inc.

REPX

NYSE; energy; SIC 1311, Crude Petroleum & Natural Gas; CIK 0001001614

None

No letter

6 of 14 inputs computable; 7 are required, with a score in every sleeve

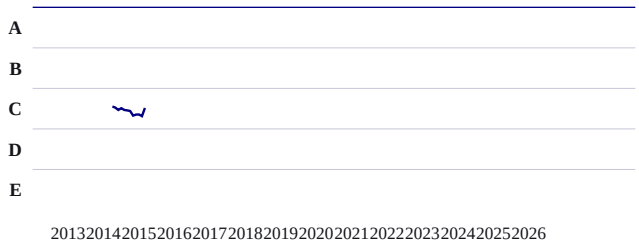
Scoreboard	
Reliability	0.91 AUC filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025
Peer failure rate	1.01% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$591M to $2.67B assets total assets $1.2B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	thin data not computable: dilution, short runway, distress
Inputs computable	6 of 14
Graded from	filings received through Mar 4, 2026 237 days before the rescan; latest periodic filing 10-Q received Aug 5, 2026
Last close	$52.83 2026-10-26; market equity $1.1B; no price enters the letter

Share price, twelve months to the rescan



Split-adjusted close. Each lollipop is a rescan and carries the letter held then.

Letter at every rescan, 2012 to 2026



Sector percentile at each rescan, 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

Riley Permian is a growth-oriented, independent oil and natural gas company focused on horizontal drilling of conventional oil-saturated and liquids-rich formations in the Permian Basin that produce long-term cash flows. The majority of our acreage is located in Yoakum County, Texas and Eddy County, New Mexico. Our strategic business objectives include enhancing the rate of return on our invested capital, generating sustainable free cash flow, maintaining a strong and flexible balance sheet and maximizing our returns to shareholders.

The fourteen inputs

lower percentile is stronger; sleeves and inputs within a sleeve carry equal weight

Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 47.4						
Gross profitability	not computable	17.5%				
one or more required annual facts are missing						
Return on invested capital	not computable	6.0%				

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prior invested-capital observation is 1826 days earlier						
Accruals ratio	(4.8%)	(5.0%)	47.4	271	2025-12-31	
Gross margin stability, five years	not computable	4.6 pts				
five annual gross margins are required; found 0						
Solvency, sleeve percentile 40.2						
Twelve-month failure probability	not computable	0.06%				
latest liabilities, cash plus short-term investments, book equity, and shares are required						
Altman Z double-prime	2.57	1.48	21.2	152	2025-12-31	
Net debt to EBITDA	not computable	3.63x				
latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31						
Interest coverage	4.25x	2.37x	17.1	83	2025-12-31	
Current ratio	0.60x	0.97x	82.2	282	2025-12-31	
Growth and financing, sleeve percentile 14.2						
Revenue growth, three-year compound	6.8%	0.7%	23.1	222	2025-12-31	
Free cash flow growth, three-year compound	not computable	(11.8%)				
four consecutive annual FCF observations are required; found 5						
Reinvestment rate	not computable	59.0%				
NOPAT must exceed $100,000						
Asset growth, three years	31.4%	6.4%	5.3	246	2025-12-31	
Net share issuance, one year	not computable	0.4%				
prior share count is 1128 days earlier						

Warnings

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

Check	Measured
Thin data	6 of 14 grade factors are computable; minimum is 7

What the price implies

at the 2026-10-26 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	51.7%	15.5%	81
Distance from 52-week high	(2.5%)	(12.2%)	84
EBIT to enterprise value	10.0%	4.5%	88
Free cash flow yield	(0.10%)	1.4%	39
Book value to price	0.59	0.52	58
Sales to price	0.36	0.43	42
Composite equity issuance, five years	(13.1%)	(7.2%)	39
Relative strength against the sector, log excess return	0.04	0.04	51

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score None of 9, period end 2025-12-31	
Return on assets above zero	pass
Operating cash flow above zero	pass
Return on assets improved	pass
Operating cash flow exceeds net income	pass
Long-term leverage fell	pass
Current ratio improved	pass
No new shares issued	fail
Gross margin improved	fail
Asset turnover improved	fail

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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	83 (10-Q received Aug 5, 2026)
Median daily dollar volume, 63 sessions	$8.3M

Sources

every fact behind the inputs; each row links to its filing index on sec.gov

#	Concept	XBRL tag	Value	Period end	Received	Form	Accession
1	operating income	us-gaap:OperatingIncomeLoss	$171.9M	2023-12-31	2026-03-04	10-K	26-000011
2	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$146.1M	2023-12-31	2026-03-04	10-K	26-000011
3	income tax	us-gaap:IncomeTaxExpenseBenefit	$34.5M	2023-12-31	2026-03-04	10-K	26-000011
4	total debt	us-gaap:LongTermDebt	$356.0M	2023-12-31	2025-03-05	10-K	25-000012
5	book equity	us-gaap:StockholdersEquity	$421.6M	2023-12-31	2026-03-04	10-K	26-000011
6	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$15.3M	2023-12-31	2024-03-06	10-K	24-000010
7	total debt	us-gaap:LongTermDebt	$124,000	2018-12-31	2020-03-30	10-K	20-007405
8	book equity	us-gaap:StockholdersEquity	$6.8M	2018-12-31	2021-03-30	10-K	21-010616
9	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$3.1M	2018-12-31	2020-03-30	10-K	20-007405
10	net income	us-gaap:NetIncomeLoss	$160.8M	2025-12-31	2026-03-04	10-K	26-000011
11	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$212.5M	2025-12-31	2026-03-04	10-K	26-000011
12	assets	us-gaap:Assets	$1.2B	2025-12-31	2026-03-04	10-K	26-000011
13	assets	us-gaap:Assets	$993.5M	2024-12-31	2026-03-04	10-K	26-000011
14	current assets	us-gaap:AssetsCurrent	$93.8M	2025-12-31	2026-03-04	10-K	26-000011
15	current liabilities	us-gaap:LiabilitiesCurrent	$156.5M	2025-12-31	2026-03-04	10-K	26-000011
16	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$327.6M	2025-12-31	2026-03-04	10-K	26-000011
17	operating income	us-gaap:OperatingIncomeLoss	$133.3M	2025-12-31	2026-03-04	10-K	26-000011
18	book equity	us-gaap:StockholdersEquity	$634.2M	2025-12-31	2026-03-04	10-K	26-000011
19	liabilities	us-gaap:Liabilities	$535.3M	2025-12-31	2026-03-04	10-K	26-000011
20	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$65.1M	2023-12-31	2026-03-04	10-K	26-000011
21	interest expense	us-gaap:InterestAndDebtExpense	$31.4M	2025-12-31	2026-03-04	10-K	26-000011
22	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$392.0M	2025-12-31	2026-03-04	10-K	26-000011
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$410.2M	2024-12-31	2026-03-04	10-K	26-000011
24	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$375.0M	2023-12-31	2026-03-04	10-K	26-000011
25	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$321.7M	2022-12-31	2024-03-06	10-K	24-000010
26	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$282,000	2014-12-31	2017-03-30	10-K	17-014015
27	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$3.0M	2014-12-31	2017-03-30	10-K	17-014015
28	operating income	us-gaap:OperatingIncomeLoss	-$739,000	2014-12-31	2017-03-30	10-K	17-014015
29	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$794,000	2014-12-31	2017-03-30	10-K	17-014015
30	income tax	us-gaap:IncomeTaxExpenseBenefit	-$6,000	2014-12-31	2017-03-30	10-K	17-014015
31	current assets	us-gaap:AssetsCurrent	$2.1M	2014-12-31	2016-03-30	10-K	16-059420
32	current liabilities	us-gaap:LiabilitiesCurrent	$2.0M	2014-12-31	2016-03-30	10-K	16-059420
33	current assets	us-gaap:AssetsCurrent	$3.2M	2013-12-31	2015-03-30	10-K	15-013485
34	current liabilities	us-gaap:LiabilitiesCurrent	$1.6M	2013-12-31	2015-03-30	10-K	15-013485
35	assets	us-gaap:Assets	$945.7M	2023-12-31	2025-03-05	10-K	25-000012
36	assets	us-gaap:Assets	$515.3M	2022-12-31	2024-03-06	10-K	24-000010
37	shares outstanding	dei:EntityCommonStockSharesOutstanding	20,400,032	2029-04-03	2024-04-03	10-K/A	24-017654
38	shares outstanding	dei:EntityCommonStockSharesOutstanding	21,567,428	2026-03-02	2026-03-04	10-K	26-000011

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