Concentra Group Holdings Parent, Inc.

CON

NYSE; healthcare; SIC 8093, Services-Specialty Outpatient Facilities, NEC; CIK 0002014596

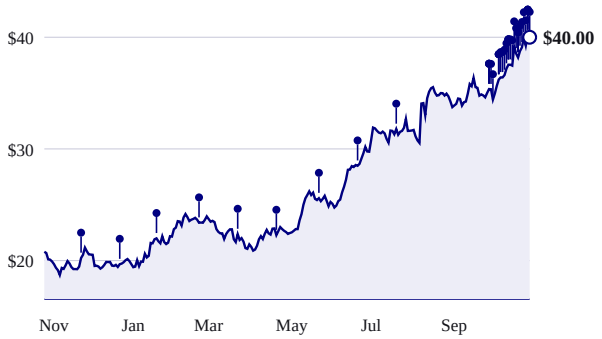
None

No letter

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

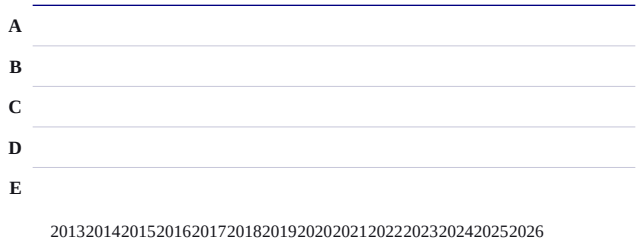
Scoreboard	
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $2.9B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	thin data not computable: distress
Inputs computable	6 of 14
Graded from	filings received through Feb 26, 2026 244 days before the rescan; latest periodic filing 10-Q received Aug 6, 2026
Last close	$40.03 2026-10-27; market equity $5.1B; 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 Feb 26, 2026

We were founded in 1979 and have grown to be the largest provider of occupational health services in the United States by number of locations. Our national presence enables us to provide access to high-quality care that supports our mission to improve the health of America's workforce. As of December 31, 2025, we operated 628 stand-alone occupational health centers in 41 states and 411 onsite health clinics at employer worksites in 44 states. We also have expanded our reach via our telemedicine program serving 43 states and the District of Columbia. In total, we deliver services across 47 states and the District of Columbia.

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 64.6						
Gross profitability	not computable	32.3%				
one or more required annual facts are missing						
Return on invested capital	not computable	9.3%				

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a prior annual debt, equity, and cash observation is required					
Accruals ratio	(4.2%)	(6.6%)	64.6	805	2025-12-31
Gross margin stability, five years	not computable	2.8 pts			
five annual gross margins are required; found 0					
Solvency, sleeve percentile 64.3					
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	1.23	(0.33)	31.7	751	2025-12-31
Net debt to EBITDA	3.87x	1.82x	74.3	75	2025-12-31
Interest coverage	not computable	(4.51x)			
one or more required annual facts are missing					
Current ratio	1.14x	2.94x	86.8	832	2025-12-31
Growth and financing, sleeve percentile 48.7					
Revenue growth, three-year compound	not computable	10.1%			
four annual observations are required; found 2					
Free cash flow growth, three-year compound	not computable	10.9%			
four consecutive annual FCF observations are required; found 2					
Reinvestment rate	(20.1%)	37.1%	79.6	104	2025-12-31
Asset growth, three years	not computable	2.1%			
four annual observations are required; found 2					
Net share issuance, one year	0.4%	2.5%	17.7	634	2026-01-31

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 2026-10-27 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	62.8%	7.7%	81
Distance from 52-week high	(0.5%)	(28.6%)	95
EBIT to enterprise value	5.1%	(1.5%)	81
Free cash flow yield	3.9%	(1.0%)	75
Book value to price	0.09	0.28	25
Sales to price	0.42	0.31	62
Composite equity issuance, five years	not computable	20.5%	
Relative strength against the sector, log excess return	0.28	(0.14)	81

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	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

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Cash, filings, liquidity	
Cash and equivalents	$158.0M
Operating cash flow, four quarters	$335.5M
Months of runway	not finite
Days since last periodic filing	83 (10-Q received Aug 6, 2026)
Median daily dollar volume, 63 sessions	$30.6M

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	$334.0M	2025-12-31	2026-02-26	10-K	26-000029
2	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$223.8M	2025-12-31	2026-02-26	10-K	26-000029
3	income tax	us-gaap:IncomeTaxExpenseBenefit	$51.0M	2025-12-31	2026-02-26	10-K	26-000029
4	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$1.6B	2025-12-31	2026-02-26	10-K	26-000029
5	book equity	us-gaap:StockholdersEquity	$393.3M	2025-12-31	2026-02-26	10-K	26-000029
6	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$79.9M	2025-12-31	2026-02-26	10-K	26-000029
7	net income	us-gaap:NetIncomeLoss	$166.4M	2025-12-31	2026-02-26	10-K	26-000029
8	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$279.4M	2025-12-31	2026-02-26	10-K	26-000029
9	assets	us-gaap:Assets	$2.9B	2025-12-31	2026-02-26	10-K	26-000029
10	assets	us-gaap:Assets	$2.5B	2024-12-31	2026-02-26	10-K	26-000029
11	current assets	us-gaap:AssetsCurrent	$383.1M	2025-12-31	2026-02-26	10-K	26-000029
12	current liabilities	us-gaap:LiabilitiesCurrent	$337.2M	2025-12-31	2026-02-26	10-K	26-000029
13	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$146.4M	2025-12-31	2026-02-26	10-K	26-000029
14	liabilities	us-gaap:Liabilities	$2.4B	2025-12-31	2026-02-26	10-K	26-000029
15	depreciation amortization	us-gaap:Depreciation	$49.9M	2025-12-31	2026-02-26	10-K	26-000029
16	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$2.2B	2025-12-31	2026-02-26	10-K	26-000029
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.9B	2024-12-31	2026-02-26	10-K	26-000029
18	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$82.3M	2025-12-31	2026-02-26	10-K	26-000029
19	current assets	us-gaap:AssetsCurrent	$437.2M	2024-12-31	2026-02-26	10-K	26-000029
20	current liabilities	us-gaap:LiabilitiesCurrent	$307.2M	2024-12-31	2026-02-26	10-K	26-000029
21	shares outstanding	dei:EntityCommonStockSharesOutstanding	128,634,749	2026-01-31	2026-02-26	10-K	26-000029
22	shares outstanding	dei:EntityCommonStockSharesOutstanding	128,125,952	2025-02-19	2025-03-03	10-K	25-000011

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