Magnolia Oil & Gas Corp.

MGY

NYSE; energy; SIC 1311, Crude Petroleum & Natural Gas; CIK 0001698990

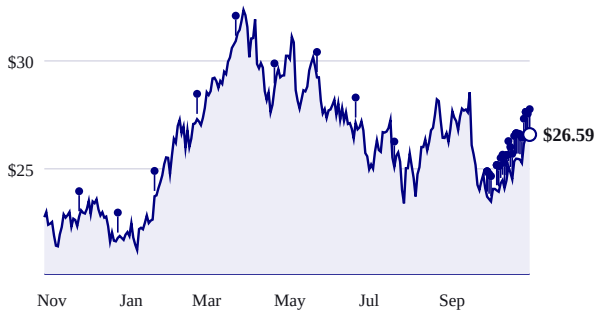
None

No letter

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

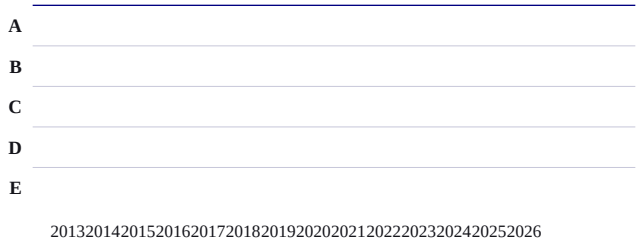
Scoreboard	
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $2.9B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	thin data not computable: dilution, distress
Inputs computable	6 of 14
Graded from	filings received through Feb 12, 2026 259 days before the rescan; latest periodic filing 10-Q received Aug 6, 2026
Last close	$26.60 2026-10-28; market equity $6.3B; 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 12, 2026

Magnolia Oil & Gas Corporation (either individually or together with its consolidated subsidiaries, as the context requires, "the Company" or "Magnolia") is an independent oil and natural gas company engaged in the acquisition, development, exploration, and production of oil, natural gas, and natural gas liquid ("NGL") reserves. The Company's oil and natural gas properties are located primarily in the Karnes and Giddings areas in South Texas, where the Company targets the Eagle Ford Shale and Austin Chalk formations.

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 7.6						
Gross profitability	not computable	17.5%				
one or more required annual facts are missing						
Return on invested capital	16.8%	6.0%		6.7	91	2025-12-31

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Accruals ratio	(19.3%)	(5.0%)	8.5	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 16.2					
Twelve-month failure probability	not computable	0.06%			
liabilities and a nearby cover-page share count are required at 2026-06-30					
Altman Z double-prime	not computable	1.48			
latest aligned inputs end 2017-12-31; latest annual assets end 2025-12-31					
Net debt to EBITDA	0.14x	3.63x	7.8	117	2025-12-31
Interest coverage	not computable	2.37x			
one or more required annual facts are missing					
Current ratio	1.54x	0.97x	24.6	282	2025-12-31
Growth and financing, sleeve percentile 75.8					
Revenue growth, three-year compound	(8.2%)	0.7%	80.1	222	2025-12-31
Free cash flow growth, three-year compound	not computable	(11.8%)			
four consecutive annual FCF observations are required; found 0					
Reinvestment rate	not computable	59.0%			
one or more required annual facts are missing					
Asset growth, three years	4.1%	6.4%	71.4	246	2025-12-31
Net share issuance, one year	not computable	0.4%			
two annual share counts are required; found 0					

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 2026-10-28 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	15.4%	15.5%	50
Distance from 52-week high	(17.8%)	(13.1%)	39
EBIT to enterprise value	6.9%	4.5%	76
Free cash flow yield	not computable	1.4%	
Book value to price	0.34	0.52	20
Sales to price	0.21	0.44	9
Composite equity issuance, five years	not computable	(7.2%)	
Relative strength against the sector, log excess return	(0.23)	0.04	17

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	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	$295.9M
Operating cash flow, four quarters	$1.0B
Months of runway	not finite
Days since last periodic filing	84 (10-Q received Aug 6, 2026)
Median daily dollar volume, 63 sessions	$89.3M

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	$439.2M	2025-12-31	2026-02-12	10-K	26-000005
2	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$417.4M	2025-12-31	2026-02-12	10-K	26-000005
3	income tax	us-gaap:IncomeTaxExpenseBenefit	$80.1M	2025-12-31	2026-02-12	10-K	26-000005
4	total debt	us-gaap:LongTermDebt	$393.3M	2025-12-31	2026-02-12	10-K	26-000005
5	book equity	us-gaap:StockholdersEquityIncludingPortionAttributableT...	$2.0B	2025-12-31	2026-02-12	10-K	26-000005
6	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$266.8M	2025-12-31	2026-02-12	10-K	26-000005
7	total debt	us-gaap:LongTermDebt	$392.5M	2024-12-31	2026-02-12	10-K	26-000005
8	book equity	us-gaap:StockholdersEquityIncludingPortionAttributableT...	$2.0B	2024-12-31	2026-02-12	10-K	26-000005
9	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$260.0M	2024-12-31	2026-02-12	10-K	26-000005
10	net income	us-gaap:NetIncomeLoss	$325.3M	2025-12-31	2026-02-12	10-K	26-000005
11	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$878.6M	2025-12-31	2026-02-12	10-K	26-000005
12	assets	us-gaap:Assets	$2.9B	2025-12-31	2026-02-12	10-K	26-000005
13	assets	us-gaap:Assets	$2.8B	2024-12-31	2026-02-12	10-K	26-000005
14	current assets	us-gaap:AssetsCurrent	$993,742	2017-12-31	2018-02-14	10-K	18-002110
15	current liabilities	us-gaap:LiabilitiesCurrent	$1.8M	2017-12-31	2018-02-14	10-K	18-002110
16	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$1.5M	2017-12-31	2018-02-14	10-K	18-002110
17	operating income	us-gaap:OperatingIncomeLoss	$190.0M	2017-12-31	2020-02-26	10-K	20-000004
18	book equity	us-gaap:StockholdersEquity	$5.0M	2017-12-31	2018-02-14	10-K	18-002110
19	assets	us-gaap:Assets	$653.9M	2017-12-31	2018-02-14	10-K	18-002110
20	liabilities	us-gaap:Liabilities	$24.6M	2017-12-31	2018-02-14	10-K	18-002110
21	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$437.8M	2025-12-31	2026-02-12	10-K	26-000005
22	current assets	us-gaap:AssetsCurrent	$442.4M	2025-12-31	2026-02-12	10-K	26-000005
23	current liabilities	us-gaap:LiabilitiesCurrent	$288.0M	2025-12-31	2026-02-12	10-K	26-000005
24	revenue	us-gaap:Revenues	$1.3B	2025-12-31	2026-02-12	10-K	26-000005
25	revenue	us-gaap:Revenues	$1.3B	2024-12-31	2026-02-12	10-K	26-000005
26	revenue	us-gaap:Revenues	$1.2B	2023-12-31	2026-02-12	10-K	26-000005
27	revenue	us-gaap:Revenues	$1.7B	2022-12-31	2025-02-19	10-K	25-000006
28	assets	us-gaap:Assets	$2.8B	2023-12-31	2025-02-19	10-K	25-000006
29	assets	us-gaap:Assets	$2.6B	2022-12-31	2024-02-15	10-K	24-000011

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