Everus Construction Group, Inc.

ECG

NYSE; other; SIC 1531, Operative Builders; CIK 0002015845

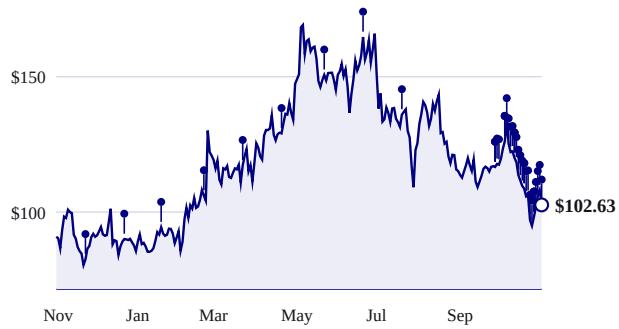
None

No letter

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

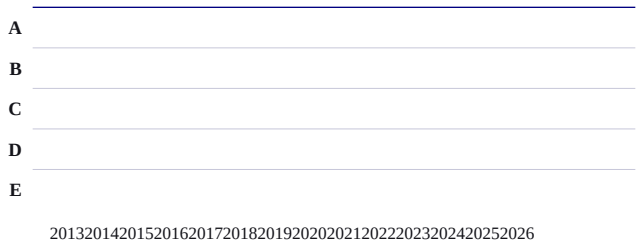
Scoreboard	
Reliability	0.91 AUC filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025
Peer failure rate	1.01% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$591M to $2.67B assets total assets $1.7B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	thin data not computable: short runway, distress, fortress balance sheet
Inputs computable	6 of 14
Graded from	filings received through Feb 25, 2026 249 days before the rescan; latest periodic filing 10-Q received Aug 5, 2026
Last close	$102.26 2026-10-30; market equity $5.2B; 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 25, 2026

References in this 2025 Annual Report to the "Company","Everus", "we", "us" or "our" refer to Everus Construction Group, Inc., a Delaware corporation, and its subsidiaries. References in this 2025 Annual Report to "MDU Resources" refer to MDU Resources Group, Inc., a Delaware corporation, and its subsidiaries (other than, after the Distribution, Everus and its subsidiaries), unless the context otherwise requires. References to Everus' historical business and operations refer to the business and operations of Everus Construction, Inc. (formerly known as MDU Construction Services Group, Inc.) ("Everus Construction") prior to the Separation and refer to Everus after the Separation.

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 67.3						
Gross profitability	26.3%	27.0%		46.9	287	2025-12-31
Return on invested capital	not computable	10.0%				

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one or more required annual facts are missing					
Accruals ratio	3.0%	(5.8%)	87.8	500	2025-12-31
Gross margin stability, five years	not computable	2.2 pts			
five annual gross margins are required; found 2					
Solvency, sleeve percentile 24.5					
Twelve-month failure probability	not computable	0.04%			
latest liabilities, cash plus short-term investments, book equity, and shares are required					
Altman Z double-prime	4.67	2.06	16.2	384	2025-12-31
Net debt to EBITDA	not computable	2.52x			
one or more required annual facts are missing					
Interest coverage	not computable	2.45x			
one or more required annual facts are missing					
Current ratio	1.76x	1.33x	32.7	505	2025-12-31
Growth and financing, sleeve percentile 32.3					
Revenue growth, three-year compound	not computable	5.1%			
four annual observations are required; found 2					
Free cash flow growth, three-year compound	not computable	8.9%			
four consecutive annual FCF observations are required; found 2					
Reinvestment rate	102.1%	11.9%	15.9	190	2025-12-31
Asset growth, three years	not computable	4.1%			
four annual observations are required; found 2					
Net share issuance, one year	0.01%	(0.5%)	48.7	352	2026-02-23

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 2026-10-30 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	29.3%	(0.6%)	76
Distance from 52-week high	(39.3%)	(23.9%)	31
EBIT to enterprise value	4.8%	4.3%	56
Free cash flow yield	1.7%	4.1%	30
Book value to price	0.15	0.34	25
Sales to price	0.71	0.70	51
Composite equity issuance, five years	not computable	(8.8%)	
Relative strength against the sector, log excess return	0.14	(0.13)	76

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	fail
Long-term leverage fell	fail
Current ratio improved	fail
No new shares issued	fail
Gross margin improved	pass

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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	88 (10-Q received Aug 5, 2026)
Median daily dollar volume, 63 sessions	$55.2M

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	gross profit	us-gaap:GrossProfit	$454.1M	2025-12-31	2026-02-25	10-K	26-000010
2	assets	us-gaap:Assets	$1.7B	2025-12-31	2026-02-25	10-K	26-000010
3	net income	us-gaap:NetIncomeLoss	$201.8M	2025-12-31	2026-02-25	10-K	26-000010
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$156.8M	2025-12-31	2026-02-25	10-K	26-000010
5	assets	us-gaap:Assets	$1.3B	2024-12-31	2026-02-25	10-K	26-000010
6	current assets	us-gaap:AssetsCurrent	$1.3B	2025-12-31	2026-02-25	10-K	26-000010
7	current liabilities	us-gaap:LiabilitiesCurrent	$736.2M	2025-12-31	2026-02-25	10-K	26-000010
8	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$485.7M	2025-12-31	2026-02-25	10-K	26-000010
9	operating income	us-gaap:OperatingIncomeLoss	$264.8M	2025-12-31	2026-02-25	10-K	26-000010
10	book equity	us-gaap:StockholdersEquity	$629.8M	2025-12-31	2026-02-25	10-K	26-000010
11	liabilities	us-gaap:Liabilities	$1.1B	2025-12-31	2026-02-25	10-K	26-000010
12	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$3.7B	2025-12-31	2026-02-25	10-K	26-000010
13	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$2.8B	2024-12-31	2026-02-25	10-K	26-000010
14	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$66.8M	2025-12-31	2026-02-25	10-K	26-000010
15	depreciation amortization	us-gaap:Depreciation	$28.7M	2025-12-31	2026-02-25	10-K	26-000010
16	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$257.8M	2025-12-31	2026-02-25	10-K	26-000010
17	income tax	us-gaap:IncomeTaxExpenseBenefit	$72.3M	2025-12-31	2026-02-25	10-K	26-000010
18	current assets	us-gaap:AssetsCurrent	$917.2M	2024-12-31	2026-02-25	10-K	26-000010
19	current liabilities	us-gaap:LiabilitiesCurrent	$513.4M	2024-12-31	2026-02-25	10-K	26-000010
20	shares outstanding	dei:EntityCommonStockSharesOutstanding	51,006,719	2026-02-23	2026-02-25	10-K	26-000010
21	shares outstanding	dei:EntityCommonStockSharesOutstanding	50,999,228	2025-02-24	2025-02-28	10-K	25-000012

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