# Endovia Health Sciences, Inc.

**EDVA**

NYSE; consumer nondurables; SIC 2080, Beverages; CIK 0001553788

**E**

**weakest fifth of 124 graded peers in consumer nondurables**

rank 122 of 124; percentile 98.4; sampling error 3.8 points; lower is stronger

A B C D E

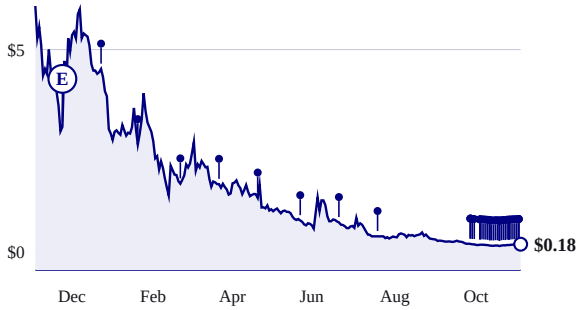
**E, the bear**



## Scoreboard

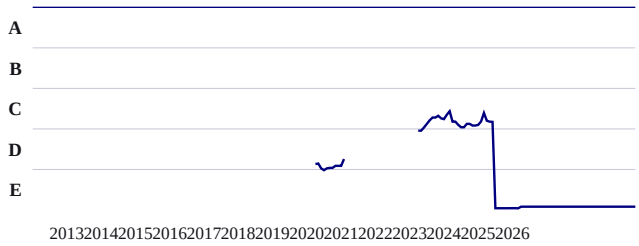
| | |
|---|---|
| **Profitability** | C<br>percentile 47.2 |
| **Solvency** | E<br>percentile 93.7 |
| **Growth and financing** | E<br>percentile 99.6 |
| **Reliability** | 0.76 AUC<br>filers with under $12.5M assets; 95% interval 0.65 to 0.86; 63 events, 2020 to 2025 |
| **Peer failure rate** | 0.60% a year<br>Item 1.03 bankruptcies, same asset band, 2012 to 2025 |
| **Size band** | under $12.5M assets<br>total assets $965,694 |
| **Standard universe** | outside<br>revenue above $1M and assets above $10M |
| **Warnings** | short runway, late filer, degenerate in...<br>not computable: dilution, distress |
| **Inputs computable** | 7 of 14 |
| **Graded from** | filings received through Apr 30, 2026<br>188 days before the rescan; latest periodic filing 10-Q received Aug 19, 2026 |
| **Last close** | $0.18<br>2026-11-03; market equity $1.2M; 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 Apr 15, 2026*

The disclosure se forth in "Item 7 - Management's Discussion and Analysis of Financial Condition and Results of Operations - Liquidity and Capital Resources - Warrants" is incorporated During the three-month period ended December 31, 2025, no officer or director has adopted any Rule 10b5-1 trading arrangement or any non-Rule 10b5-1 trading arrangement within the meaning of Item 408 of Regulation S-K promulgated under the Securities Act of 1933. ITEM 9C. DISCLOSURE REGARDING FOREIGN JURISDICTIONS THAT PREVENT INSPECTIONS.

## 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 47.2** | | | | | | |
| Gross profitability | 1.7% | 29.8% | | 94.4 | 145 | 2025-12-31 |
| Return on invested capital | not computable | 5.6% | | | | |
| *one or more required annual facts are missing* | | | | | | |

Not investment advice. Informational and educational only. Data from SEC EDGAR, may contain errors, is not warranted. The grade ranks reported financial condition and is not a return forecast.

| | | | | | |
|---|---|---|---|---|---|
| Accruals ratio | (1,096.1%) | (5.1%) | 0.0 | 150 | 2025-12-31 |
| Gross margin stability, five years | not computable | 1.9 pts | | | |
| *annual revenue must exceed $100,000* | | | | | |
| **Solvency, sleeve percentile 93.7** | | | | | |
| Twelve-month failure probability | not computable | 0.03% | | | |
| *latest liabilities, cash plus short-term investments, book equity, and shares are required* | | | | | |
| Altman Z double-prime | (819.93) | 3.11 | 100.0 | 120 | 2025-12-31 |
| Net debt to EBITDA | not computable | 2.54x | | | |
| *EBITDA must exceed $100,000* | | | | | |
| Interest coverage | (5.62x) | 2.51x | 81.0 | 43 | 2025-12-31 |
| Current ratio | 0.04x | 1.81x | 100.0 | 154 | 2025-12-31 |
| **Growth and financing, sleeve percentile 99.6** | | | | | |
| Revenue growth, three-year compound | (84.1%) | 0.2% | 100.0 | 133 | 2025-12-31 |
| Free cash flow growth, three-year compound | not computable | 14.9% | | | |
| *four consecutive annual FCF observations are required; found 9* | | | | | |
| Reinvestment rate | not computable | 11.0% | | | |
| *one or more required annual facts are missing* | | | | | |
| Asset growth, three years | (61.8%) | 0.2% | 99.2 | 134 | 2025-12-31 |
| Net share issuance, one year | not computable | 0.03% | | | |
| *prior share count is 8 days earlier* | | | | | |

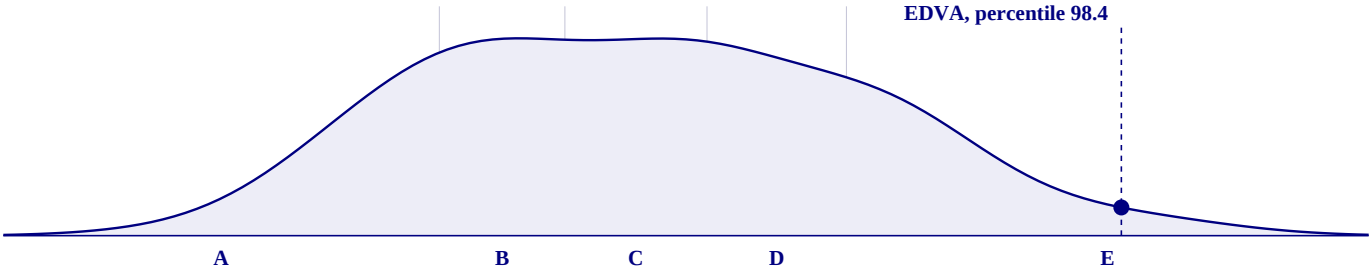
## Warnings

*4 of 7 checks triggered; none of them enters the letter*

| Check | Measured |
|---|---|
| Short runway | cash runway is 0.5 months |
| Late filer | found 7 NT 10-K/Q filings in the last eight quarters |
| Degenerate inputs | latest revenue or assets are at or below the $100,000 validity floor |
| Fortress balance sheet | cash minus debt is 278,017 USD; Altman Z is not used |

## Among 124 peers

*consumer nondurables; 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 |
|---|---|---|---|---|
| 117 | Culp Inc. (CULP) | 94.3 | E | fortress balance sheet |
| 118 | Mondelez International, Inc. (MDLZ) | 95.1 | E | |
| 119 | Hain Celestial Group Inc. (HAIN) | 95.9 | E | fortress balance sheet |
| 120 | Limoneira Co. (LMNR) | 96.7 | E | |
| 121 | Reed'S, Inc. (REED) | 97.6 | E | |
| 122 | Endovia Health Sciences, Inc. (EDVA) | 98.4 | E | short runway, late filer, degenerate inputs, fortress balance sheet |
| 123 | 22nd Century Group, Inc. (XXII) | 99.2 | E | dilution, fortress balance sheet |
| 124 | Planet Green Holdings Corp. (PLAG) | 100.0 | E | dilution, late filer, fortress balance sheet |

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## What the price implies

*at the 2026-11-03 close; none of these enters the grade*

| Measure | Value | Peer median | Percentile |
|---|---|---|---|
| Twelve-month price change, skipping the latest month | (97.3%) | (1.3%) | 2 |
| Distance from 52-week high | (97.0%) | (20.3%) | 2 |
| EBIT to enterprise value | (1,560.3%) | 3.7% | 0 |
| Free cash flow yield | (634.8%) | 4.3% | 0 |
| Book value to price | (13.68) | 0.55 | 0 |
| Sales to price | 0.06 | 1.22 | 0 |
| Composite equity issuance, five years | not computable | (16.7%) | |
| Relative strength against the sector, log excess return | (3.69) | (0.09) | 2 |

## 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 | fail |
| Operating cash flow above zero | fail |
| Return on assets improved | fail |
| Operating cash flow exceeds net income | pass |
| Long-term leverage fell | pass |
| Current ratio improved | fail |
| No new shares issued | fail |
| Gross margin improved | fail |
| Asset turnover improved | fail |
| **Cash, filings, liquidity** | |
| Cash and equivalents | $242,702 |
| Operating cash flow, four quarters | -$5.5M |
| Months of runway | 0.5 |
| Days since last periodic filing | 77 (10-Q received Aug 19, 2026) |
| Median daily dollar volume, 63 sessions | $113,376 |

## 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 | $16,898 | 2025-12-31 | 2026-04-15 | 10-K | 26-000577 |
| 2 | assets | us-gaap:Assets | $965,694 | 2025-12-31 | 2026-04-15 | 10-K | 26-000577 |
| 3 | net income | us-gaap:NetIncomeLoss | -$25.2M | 2025-12-31 | 2026-04-15 | 10-K | 26-000577 |
| 4 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | -$4.8M | 2025-12-31 | 2026-04-15 | 10-K | 26-000577 |
| 5 | assets | us-gaap:Assets | $2.8M | 2024-12-31 | 2026-04-15 | 10-K | 26-000577 |
| 6 | revenue | us-gaap:Revenues | $73,066 | 2025-12-31 | 2026-04-15 | 10-K | 26-000577 |
| 7 | current assets | us-gaap:AssetsCurrent | $631,993 | 2025-12-31 | 2026-04-15 | 10-K | 26-000577 |
| 8 | current liabilities | us-gaap:LiabilitiesCurrent | $16.3M | 2025-12-31 | 2026-04-15 | 10-K | 26-000577 |
| 9 | retained earnings | us-gaap:RetainedEarningsAccumulatedDeficit | -$181.9M | 2025-12-31 | 2026-04-15 | 10-K | 26-000577 |
| 10 | operating income | us-gaap:OperatingIncomeLoss | -$14.2M | 2025-12-31 | 2026-04-15 | 10-K | 26-000577 |
| 11 | book equity | us-gaap:StockholdersEquity | -$15.3M | 2025-12-31 | 2026-04-15 | 10-K | 26-000577 |
| 12 | liabilities | us-gaap:Liabilities | $16.3M | 2025-12-31 | 2026-04-15 | 10-K | 26-000577 |
| 13 | total debt | us-gaap:LongTermDebt | $3,418 | 2025-12-31 | 2026-04-15 | 10-K | 26-000577 |
| 14 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $281,435 | 2025-12-31 | 2026-04-15 | 10-K | 26-000577 |
| 15 | depreciation amortization | us-gaap:Depreciation | $148,070 | 2025-12-31 | 2026-04-15 | 10-K | 26-000577 |
| 16 | interest expense | us-gaap:InterestExpense | $2.5M | 2025-12-31 | 2026-04-15 | 10-K | 26-000577 |
| 17 | revenue | us-gaap:Revenues | $801,273 | 2024-12-31 | 2026-04-15 | 10-K | 26-000577 |
| 18 | revenue | us-gaap:Revenues | $18.9M | 2023-12-31 | 2025-07-11 | 10-K | 25-000964 |

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| | | | | | | | |
|---|---|---|---|---|---|---|---|
| 19 | revenue | us-gaap:Revenues | $18.1M | 2022-12-31 | 2024-03-29 | 10-K | 24-000539 |
| 20 | assets | us-gaap:Assets | $9.9M | 2023-12-31 | 2025-07-11 | 10-K | 25-000964 |
| 21 | assets | us-gaap:Assets | $17.3M | 2022-12-31 | 2024-03-29 | 10-K | 24-000539 |
| 22 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 10,858,508 | 2026-04-22 | 2026-04-30 | 10-K/A | 26-000640 |
| 23 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 9,953,538 | 2026-04-14 | 2026-04-15 | 10-K | 26-000577 |

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