Gran Tierra Energy Inc.

GTE

NYSE; energy; SIC 1311, Crude Petroleum & Natural Gas; CIK 0001273441

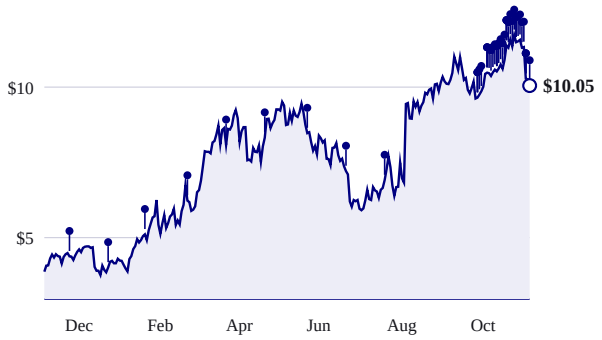
None

No letter

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

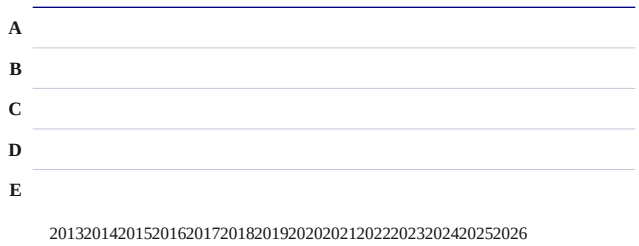
Scoreboard	
Reliability	0.91 AUC filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025
Peer failure rate	1.01% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$591M to $2.67B assets total assets $1.6B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	thin data not computable: distress
Inputs computable	6 of 14
Graded from	filings received through Mar 4, 2026 246 days before the rescan; latest periodic filing 10-Q received Aug 5, 2026
Last close	$10.07 2026-11-04; market equity $356.3M; 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

Gran Tierra Energy Inc., together with its subsidiaries ("Gran Tierra", "the Company", "us", "our", or "we"), is a company focused on oil and gas exploration and production, with assets in Colombia, Canada and Ecuador. Our Colombian properties represented 46%, our Canadian properties represented 38%, and our Ecuadorian properties represented 16% of our proved reserves NAR at December 31, 2025 and for the year ended December 31, 2025, 70% (2024 - 93%, 2023 -97%) of our revenue was generated in Colombia, 19% of our revenue was generated in Canada (2024 - 3% and 2023 - nil) and 11% (2024 - 4%, 2023 - 3%) of our revenue was generated in Ecuador.

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 20.1						
Gross profitability	20.9%	17.5%		37.5	81	2025-12-31
Return on invested capital	not computable	6.0%				

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one or more required annual facts are missing						
Accruals ratio	(31.2%)	(5.0%)	2.6	270	2025-12-31	
Gross margin stability, five years	not computable	4.6 pts				
five annual gross margins are required; found 3						
Solvency, sleeve percentile 81.8						
Twelve-month failure probability	not computable	0.05%				
liabilities and a nearby cover-page share count are required at 2026-06-30						
Altman Z double-prime	not computable	1.48				
one or more required annual facts are missing						
Net debt to EBITDA	not computable	3.63x				
one or more required annual facts are missing						
Interest coverage	not computable	2.37x				
one or more required annual facts are missing						
Current ratio	0.60x	0.97x	81.8	281	2025-12-31	
Growth and financing, sleeve percentile 51.3						
Revenue growth, three-year compound	(5.7%)	0.7%	74.5	221	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	5.9%	6.4%	61.5	245	2025-12-31	
Net share issuance, one year	(1.6%)	0.4%	17.9	157	2026-02-27	

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 2026-11-04 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	187.5%	6.5%	100
Distance from 52-week high	(14.3%)	(18.2%)	59
EBIT to enterprise value	not computable	4.7%	
Free cash flow yield	not computable	1.5%	
Book value to price	0.37	0.54	20
Sales to price	1.68	0.47	90
Composite equity issuance, five years	(3.7%)	(7.1%)	55
Relative strength against the sector, log excess return	0.70	0.02	99

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 4 of 9, period end 2025-12-31	
Return on assets above zero	fail
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	fail
No new shares issued	pass
Gross margin improved	fail

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Asset turnover improved	fail

Cash, filings, liquidity

Cash and equivalents	$126.7M
Operating cash flow, four quarters	$435.5M
Months of runway	not finite
Days since last periodic filing	92 (10-Q received Aug 5, 2026)
Median daily dollar volume, 63 sessions	$6.0M

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	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$596.7M	2025-12-31	2026-03-04	10-K	26-000010
2	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$265.8M	2025-12-31	2026-03-04	10-K	26-000010
3	assets	us-gaap:Assets	$1.6B	2025-12-31	2026-03-04	10-K	26-000010
4	net income	us-gaap:NetIncomeLoss	-$193.1M	2025-12-31	2026-03-04	10-K	26-000010
5	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$313.2M	2025-12-31	2026-03-04	10-K	26-000010
6	assets	us-gaap:Assets	$1.7B	2024-12-31	2026-03-04	10-K	26-000010
7	current assets	us-gaap:AssetsCurrent	$213.5M	2025-12-31	2026-03-04	10-K	26-000010
8	current liabilities	us-gaap:LiabilitiesCurrent	$355.7M	2025-12-31	2026-03-04	10-K	26-000010
9	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$621.8M	2024-12-31	2026-03-04	10-K	26-000010
10	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$637.0M	2023-12-31	2026-03-04	10-K	26-000010
11	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$711.4M	2022-12-31	2025-02-24	10-K	25-000002
12	assets	us-gaap:Assets	$1.3B	2023-12-31	2025-02-24	10-K	25-000002
13	assets	us-gaap:Assets	$1.3B	2022-12-31	2024-02-20	10-K	24-000006
14	shares outstanding	dei:EntityCommonStockSharesOutstanding	35,298,774	2026-02-27	2026-03-04	10-K	26-000010
15	shares outstanding	dei:EntityCommonStockSharesOutstanding	35,888,773	2025-02-20	2025-02-24	10-K	25-000002

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