Onterris, Inc.

ONT

NYSE; other; SIC 8742, Services-Management Consulting Services; CIK 0001643615

C

middle fifth of 334 graded peers in other

rank 150 of 334; percentile 44.7; sampling error 2.7 points; lower is stronger

A B C D E

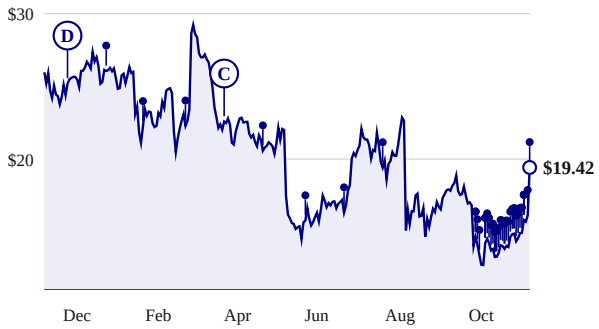
C, the tortoise



Scoreboard

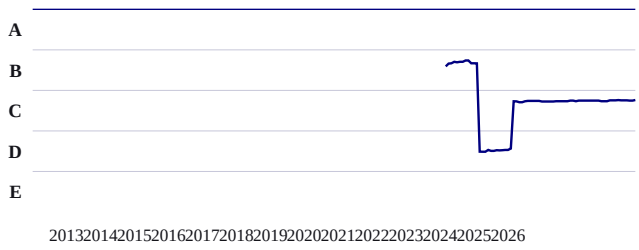
Profitability	B/C percentile 40.4
Solvency	D percentile 64.2
Growth and financing	B percentile 34.8
Reliability	0.91 AUC filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025
Peer failure rate	1.01% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$591M to $2.67B assets total assets $981.3M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress
Inputs computable	10 of 14
Graded from	filings received through Feb 26, 2026 253 days before the rescan; latest periodic filing 10-Q received Nov 5, 2026
Last close	$19.36 2026-11-05; market equity $680.5M; 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

Since our inception in 2012, our mission has been to help clients and communities meet their environmental goals and needs. We service complex and often non-discretionary environmental needs of our diverse clients across our three business segments: Assessment, Permitting and Response; Measurement and Analysis; and Remediation and Reuse. Examples of our services include: Our industry is highly fragmented with no single market leader. By focusing solely on environmental solutions, we believe we are uniquely positioned to become a leading platform in the environmental industry.

The fourteen inputs

lower percentile is stronger; sleeves and inputs within a sleeve carry equal weight

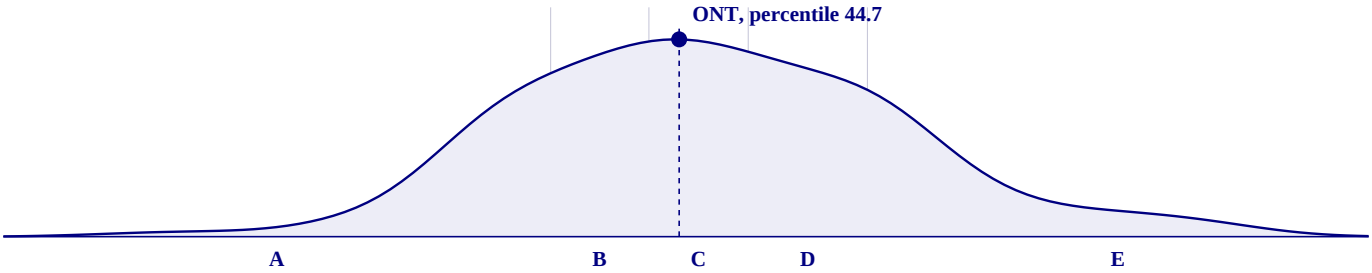
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 40.4						
Gross profitability	34.1%	27.1%		35.8	286	2025-12-31
Return on invested capital	not computable	10.0%				
pretax income must exceed the validity floor and imply a 0%-100% tax rate						

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	(11.0%)	(5.8%)	22.8	502	2025-12-31
Gross margin stability, five years	3.0 pts	2.2 pts	62.6	204	2025-12-31
Solvency, sleeve percentile 64.2					
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	0.55	2.06	56.3	388	2025-12-31
Net debt to EBITDA	11.07x	2.51x	92.2	181	2025-12-31
Interest coverage	not computable	2.45x			
one or more required annual facts are missing					
Current ratio	1.43x	1.33x	44.2	508	2025-12-31
Growth and financing, sleeve percentile 34.8					
Revenue growth, three-year compound	15.1%	5.1%	19.5	396	2025-12-31
Free cash flow growth, three-year compound	102.0%	8.9%	4.6	218	2025-12-31
Reinvestment rate	not computable	11.9%			
pretax income must exceed the validity floor and imply a 0%-100% tax rate					
Asset growth, three years	7.4%	4.1%	35.8	431	2025-12-31
Net share issuance, one year	4.8%	(0.5%)	79.1	351	2026-02-20

Among 334 peers

other; 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
145	NPK International Inc. (NPKI)	43.2	C	
146	Werner Enterprises Inc. (WERN)	43.5	C	
147	TSS, Inc. (TSSI)	43.8	C	late filer, fortress balance sheet
148	Aecom (ACM)	44.1	C	
149	EVgo Inc. (EVGO)	44.4	C	
150	Onterris, Inc. (ONT)	44.7	C	
151	United Parks & Resorts Inc. (PRKS)	45.0	C	late filer
152	Freeport-Mcmoran Inc. (FCX)	45.3	C	
153	Fortune Brands Innovations, Inc. (FBIN)	45.6	C	
154	Everforth Inc. (EFOR)	45.9	C	
155	Ebay Inc. (EBAY)	46.2	C	

What the price implies

at the 2026-11-05 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(48.3%)	(0.6%)	11
Distance from 52-week high	(33.5%)	(24.6%)	37
EBIT to enterprise value	1.2%	4.4%	22
Free cash flow yield	13.4%	4.1%	90
Book value to price	0.66	0.35	76
Sales to price	1.22	0.71	67

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.

Composite equity issuance, five years	33.3%	(8.8%)	89
Relative strength against the sector, log excess return	(0.78)	(0.13)	11

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	pass
Operating cash flow exceeds net income	pass
Long-term leverage fell	fail
Current ratio improved	fail
No new shares issued	fail
Gross margin improved	pass
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$20.1M
Operating cash flow, four quarters	$87.3M
Months of runway	not finite
Days since last periodic filing	1 (10-Q received Nov 5, 2026)
Median daily dollar volume, 63 sessions	$9.5M

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...	$830.5M	2025-12-31	2026-02-26	10-K	26-076511
2	cost of revenue	us-gaap:CostOfRevenue	$496.2M	2025-12-31	2026-02-26	10-K	26-076511
3	assets	us-gaap:Assets	$981.3M	2025-12-31	2026-02-26	10-K	26-076511
4	operating income	us-gaap:OperatingIncomeLoss	$11.7M	2025-12-31	2026-02-26	10-K	26-076511
5	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$11.2M	2025-12-31	2026-02-26	10-K	26-076511
6	income tax	us-gaap:IncomeTaxExpenseBenefit	$12.1M	2025-12-31	2026-02-26	10-K	26-076511
7	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$277.1M	2025-12-31	2026-02-26	10-K	26-076511
8	book equity	us-gaap:StockholdersEquity	$451.2M	2025-12-31	2026-02-26	10-K	26-076511
9	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$11.2M	2025-12-31	2026-02-26	10-K	26-076511
10	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$204.8M	2024-12-31	2026-02-26	10-K	26-076511
11	book equity	us-gaap:StockholdersEquity	$446.3M	2024-12-31	2026-02-26	10-K	26-076511
12	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$12.9M	2024-12-31	2026-02-26	10-K	26-076511
13	net income	us-gaap:NetIncomeLoss	-$843,000	2025-12-31	2026-02-26	10-K	26-076511
14	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$107.5M	2025-12-31	2026-02-26	10-K	26-076511
15	assets	us-gaap:Assets	$990.4M	2024-12-31	2026-02-26	10-K	26-076511
16	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$696.4M	2024-12-31	2026-02-26	10-K	26-076511
17	cost of revenue	us-gaap:CostOfRevenue	$418.2M	2024-12-31	2026-02-26	10-K	26-076511
18	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$624.2M	2023-12-31	2026-02-26	10-K	26-076511
19	cost of revenue	us-gaap:CostOfRevenue	$383.9M	2023-12-31	2026-02-26	10-K	26-076511
20	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$544.4M	2022-12-31	2025-03-03	10-K	25-030806
21	cost of revenue	us-gaap:CostOfRevenue	$351.9M	2022-12-31	2025-03-03	10-K	25-030806
22	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$546.4M	2021-12-31	2024-02-29	10-K	24-023043
23	cost of revenue	us-gaap:CostOfRevenue	$369.0M	2021-12-31	2024-02-29	10-K	24-023043
24	current assets	us-gaap:AssetsCurrent	$240.4M	2025-12-31	2026-02-26	10-K	26-076511
25	current liabilities	us-gaap:LiabilitiesCurrent	$168.0M	2025-12-31	2026-02-26	10-K	26-076511
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$273.5M	2025-12-31	2026-02-26	10-K	26-076511
27	liabilities	us-gaap:Liabilities	$530.1M	2025-12-31	2026-02-26	10-K	26-076511
28	depreciation amortization	us-gaap:Depreciation	$12.3M	2025-12-31	2026-02-26	10-K	26-076511
29	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$16.3M	2025-12-31	2026-02-26	10-K	26-076511

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.

30	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$22.2M	2024-12-31	2026-02-26	10-K	26-076511
31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$21.3M	2024-12-31	2026-02-26	10-K	26-076511
32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$56.0M	2023-12-31	2026-02-26	10-K	26-076511
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$29.6M	2023-12-31	2026-02-26	10-K	26-076511
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$20.6M	2022-12-31	2025-03-03	10-K	25-030806
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$9.6M	2022-12-31	2025-03-03	10-K	25-030806
36	current assets	us-gaap:AssetsCurrent	$238.0M	2024-12-31	2026-02-26	10-K	26-076511
37	current liabilities	us-gaap:LiabilitiesCurrent	$158.7M	2024-12-31	2026-02-26	10-K	26-076511
38	assets	us-gaap:Assets	$816.8M	2023-12-31	2025-03-03	10-K	25-030806
39	assets	us-gaap:Assets	$791.9M	2022-12-31	2024-02-29	10-K	24-023043
40	shares outstanding	dei:EntityCommonStockSharesOutstanding	35,980,650	2026-02-20	2026-02-26	10-K	26-076511
41	shares outstanding	dei:EntityCommonStockSharesOutstanding	34,339,764	2025-02-21	2025-03-03	10-K	25-030806

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.