EOG Resources Inc.

EOG

NYSE; energy; SIC 1311, Crude Petroleum & Natural Gas; CIK 0000821189

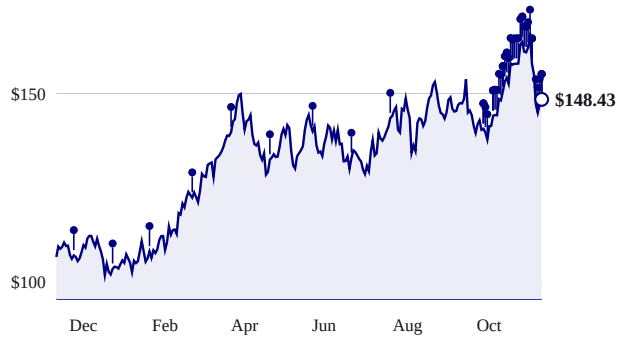
None

No letter

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

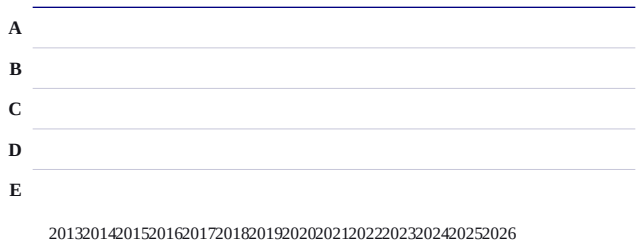
Scoreboard	
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $51.8B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	thin data not computable: distress, fortress balance sheet
Inputs computable	6 of 14
Graded from	filings received through Feb 24, 2026 259 days before the rescan; latest periodic filing 10-Q received Nov 5, 2026
Last close	$148.44 2026-11-09; market equity $77.0B; 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 24, 2026

EOG Resources, Inc., a Delaware corporation organized in 1985, together with its subsidiaries (collectively, EOG), explores for, develops, produces and markets crude oil, natural gas liquids (NGLs) and natural gas primarily in major producing basins in the United States of America (United States or U.S.), the Republic of Trinidad and Tobago (Trinidad) and, from time to time, select other international areas, including the Kingdom of Bahrain and the United Arab Emirates. EOG's principal producing areas are further described in "Exploration and Production" below.

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 25.3						
Gross profitability	not computable	17.5%				
one or more required annual facts are missing						
Return on invested capital	not computable	6.0%				

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one or more required annual facts are missing					
Accruals ratio	(10.2%)	(5.0%)	25.3	270	2025-12-31
Gross margin stability, five years	not computable	4.6 pts			
five annual gross margins are required; found 0					
Solvency, sleeve percentile 10.2					
Twelve-month failure probability	not computable	0.05%			
liabilities and a nearby cover-page share count are required at 2026-09-30					
Altman Z double-prime	not computable	1.48			
one or more required annual facts are missing					
Net debt to EBITDA	not computable	3.60x			
one or more required annual facts are missing					
Interest coverage	27.17x	2.37x	0.0	83	2025-12-31
Current ratio	1.63x	1.01x	20.4	281	2025-12-31
Growth and financing, sleeve percentile 43.2					
Revenue growth, three-year compound	(4.2%)	0.7%	72.7	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	7.8%	6.3%	48.4	245	2025-12-31
Net share issuance, one year	(3.1%)	0.4%	8.4	156	2026-02-13

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 2026-11-09 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	33.4%	6.3%	77
Distance from 52-week high	(10.3%)	(18.6%)	75
EBIT to enterprise value	8.5%	4.6%	83
Free cash flow yield	not computable	1.7%	
Book value to price	0.43	0.52	30
Sales to price	0.29	0.49	29
Composite equity issuance, five years	(37.8%)	(7.0%)	14
Relative strength against the sector, log excess return	(0.07)	0.02	36

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	fail
Current ratio improved	fail
No new shares issued	pass
Gross margin improved	fail
Asset turnover improved	fail

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Cash, filings, liquidity	
Cash and equivalents	$5.7B
Operating cash flow, four quarters	$14.1B
Months of runway	not finite
Days since last periodic filing	5 (10-Q received Nov 5, 2026)
Median daily dollar volume, 63 sessions	$403.6M

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	net income	us-gaap:NetIncomeLoss	$5.0B	2025-12-31	2026-02-24	10-K	26-000054
2	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$10.0B	2025-12-31	2026-02-24	10-K	26-000054
3	assets	us-gaap:Assets	$51.8B	2025-12-31	2026-02-24	10-K	26-000054
4	assets	us-gaap:Assets	$47.2B	2024-12-31	2026-02-24	10-K	26-000054
5	operating income	us-gaap:OperatingIncomeLoss	$6.4B	2025-12-31	2026-02-24	10-K	26-000054
6	interest expense	us-gaap:InterestExpense	$235.0M	2025-12-31	2026-02-24	10-K	26-000054
7	current assets	us-gaap:AssetsCurrent	$7.7B	2025-12-31	2026-02-24	10-K	26-000054
8	current liabilities	us-gaap:LiabilitiesCurrent	$4.7B	2025-12-31	2026-02-24	10-K	26-000054
9	revenue	us-gaap:Revenues	$22.6B	2025-12-31	2026-02-24	10-K	26-000054
10	revenue	us-gaap:Revenues	$23.7B	2024-12-31	2026-02-24	10-K	26-000054
11	revenue	us-gaap:Revenues	$24.2B	2023-12-31	2026-02-24	10-K	26-000054
12	revenue	us-gaap:Revenues	$25.7B	2022-12-31	2025-02-27	10-K	25-000011
13	assets	us-gaap:Assets	$43.9B	2023-12-31	2026-02-24	10-K	26-000054
14	assets	us-gaap:Assets	$41.4B	2022-12-31	2025-02-27	10-K	25-000011
15	shares outstanding	dei:EntityCommonStockSharesOutstanding	536,491,493	2026-02-13	2026-02-24	10-K	26-000054
16	shares outstanding	dei:EntityCommonStockSharesOutstanding	553,926,330	2025-02-13	2025-02-27	10-K	25-000011

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