Pennant Group, Inc.

PNTG

Nasdaq; healthcare; SIC 8000, Services-Health Services; CIK 0001766400

D

fourth fifth of 369 graded peers in healthcare

rank 263 of 369; percentile 71.2; sampling error 2.5 points; lower is stronger

A B C D E

D, the sloth



Scoreboard

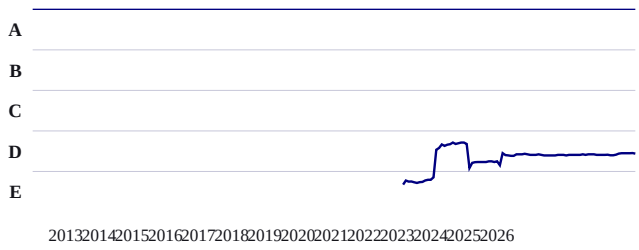
Profitability	D percentile 75.3
Solvency	C/D percentile 58.6
Growth and financing	B percentile 32.5
Reliability	0.91 AUC filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025
Peer failure rate	1.01% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$591M to $2.67B assets total assets $968.2M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: short runway, distress, fortress balance sheet
Inputs computable	7 of 14
Graded from	filings received through Feb 26, 2026 258 days before the rescan; latest periodic filing 10-Q received Nov 4, 2026
Last close	$36.81 2026-11-10; market equity $1.3B; 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

The Pennant Group, Inc. is a leading provider of high-quality healthcare services to patients, residents, and clients of all ages, including the growing senior population, in the United States. We strive to be the provider of choice in the communities we serve through our innovative operating model and unique core values. As of December 31, 2025, we operate in multiple lines of business, including home health, hospice, and senior living services across Alabama, Arizona, California, Colorado, Georgia, Idaho, Montana, Nevada, Oklahoma, Oregon, Tennessee, Texas, Utah, Washington, Wisconsin and Wyoming.

The fourteen inputs

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

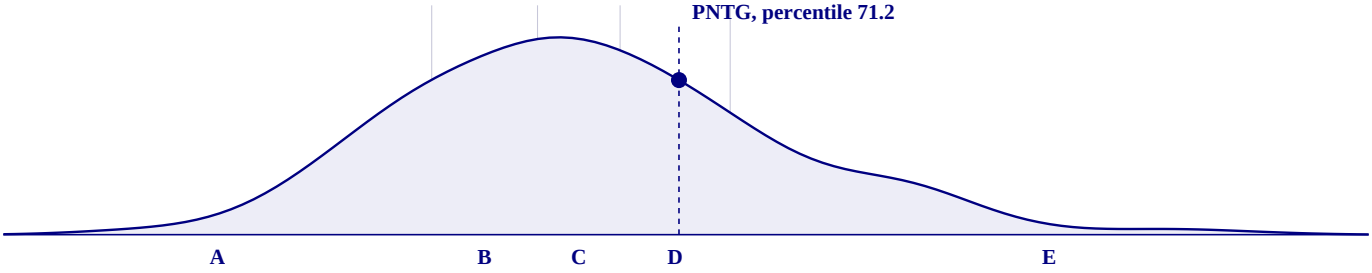
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 75.3						
Gross profitability	not computable	32.3%				
one or more required annual facts are missing						
Return on invested capital	not computable	9.3%				

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one or more required annual facts are missing						
Accruals ratio	(2.3%)	(6.6%)	75.3	800	2025-12-31	
Gross margin stability, five years	not computable	2.8 pts				
five annual gross margins are required; found 0						
Solvency, sleeve percentile 58.6						
Twelve-month failure probability	not computable	0.08%				
latest liabilities, cash plus short-term investments, book equity, and shares are required						
Altman Z double-prime	1.45	(0.35)	30.6	745	2025-12-31	
Net debt to EBITDA	not computable	1.82x				
one or more required annual facts are missing						
Interest coverage	not computable	(4.51x)				
latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31						
Current ratio	1.14x	2.95x	86.5	826	2025-12-31	
Growth and financing, sleeve percentile 32.5						
Revenue growth, three-year compound	26.0%	10.1%	25.1	412	2025-12-31	
Free cash flow growth, three-year compound	not computable	11.0%				
current FCF must be positive and base FCF must exceed $100,000						
Reinvestment rate	6.5%	37.1%	65.4	105	2025-12-31	
Asset growth, three years	23.7%	2.2%	18.6	694	2025-12-31	
Net share issuance, one year	0.7%	2.5%	20.9	628	2026-02-23	

Among 369 peers

healthcare; 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
258	Lyell Immunopharma, Inc. (LYEL)	69.8	D	dilution, degenerate inputs
259	Bioventus Inc. (BVS)	70.1	D	
260	Regeneron Pharmaceuticals, Inc. (REGN)	70.4	D	
261	uniQure N.V. (QURE)	70.7	D	fortress balance sheet
262	Bausch & Lomb Corp. (BLCO)	70.9	D	
263	Pennant Group, Inc. (PNTG)	71.2	D	
264	Bausch Health Companies Inc. (BHC)	71.5	D	
265	Cumberland Pharmaceuticals Inc. (CPIX)	71.7	D	
266	3M Co. (MMM)	72.0	D	
267	Elanco Animal Health Inc. (ELAN)	72.3	D	
268	Rockwell Medical, Inc. (RMTI)	72.6	D	

What the price implies

at the 2026-11-10 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	57.7%	(1.9%)	80
Distance from 52-week high	(16.6%)	(28.5%)	62
EBIT to enterprise value	not computable	(1.6%)	

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Free cash flow yield	2.8%	(1.0%)	70
Book value to price	0.33	0.27	55
Sales to price	0.73	0.29	76
Composite equity issuance, five years	21.8%	20.8%	50
Relative strength against the sector, log excess return	0.29	(0.19)	80

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	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	fail
Asset turnover improved	pass
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	7 (10-Q received Nov 4, 2026)
Median daily dollar volume, 63 sessions	$10.6M

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	$29.6M	2025-12-31	2026-02-26	10-K	26-000014
2	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$48.3M	2025-12-31	2026-02-26	10-K	26-000014
3	assets	us-gaap:Assets	$968.2M	2025-12-31	2026-02-26	10-K	26-000014
4	assets	us-gaap:Assets	$679.5M	2024-12-31	2026-02-26	10-K	26-000014
5	current assets	us-gaap:AssetsCurrent	$167.4M	2025-12-31	2026-02-26	10-K	26-000014
6	current liabilities	us-gaap:LiabilitiesCurrent	$147.3M	2025-12-31	2026-02-26	10-K	26-000014
7	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$86.8M	2025-12-31	2026-02-26	10-K	26-000014
8	operating income	us-gaap:OperatingIncomeLoss	$51.9M	2025-12-31	2026-02-26	10-K	26-000014
9	book equity	us-gaap:StockholdersEquityIncludingPortionAttributableT...	$374.3M	2025-12-31	2026-02-26	10-K	26-000014
10	liabilities	us-gaap:Liabilities	$593.9M	2025-12-31	2026-02-26	10-K	26-000014
11	operating income	us-gaap:OperatingIncomeLoss	$25.2M	2023-12-31	2026-02-26	10-K	26-000014
12	interest expense	us-gaap:InterestExpense	$5.9M	2023-12-31	2024-02-28	10-K	24-000022
13	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$947.7M	2025-12-31	2026-02-26	10-K	26-000014
14	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$695.2M	2024-12-31	2026-02-26	10-K	26-000014
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$544.9M	2023-12-31	2026-02-26	10-K	26-000014
16	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$473.2M	2022-12-31	2025-02-27	10-K	25-000024
17	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$12.0M	2025-12-31	2026-02-26	10-K	26-000014
18	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$39.3M	2024-12-31	2026-02-26	10-K	26-000014
19	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$9.0M	2024-12-31	2026-02-26	10-K	26-000014
20	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$33.1M	2023-12-31	2026-02-26	10-K	26-000014
21	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$8.1M	2023-12-31	2026-02-26	10-K	26-000014
22	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$9.0M	2022-12-31	2025-02-27	10-K	25-000024
23	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$14.2M	2022-12-31	2025-02-27	10-K	25-000024
24	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$8.5M	2025-12-31	2026-02-26	10-K	26-000014
25	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$45.6M	2025-12-31	2026-02-26	10-K	26-000014

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26	income tax	us-gaap:IncomeTaxExpenseBenefit	$11.9M	2025-12-31	2026-02-26	10-K	26-000014
27	current assets	us-gaap:AssetsCurrent	$122.9M	2024-12-31	2026-02-26	10-K	26-000014
28	current liabilities	us-gaap:LiabilitiesCurrent	$101.7M	2024-12-31	2026-02-26	10-K	26-000014
29	assets	us-gaap:Assets	$539.7M	2023-12-31	2025-02-27	10-K	25-000024
30	assets	us-gaap:Assets	$512.1M	2022-12-31	2024-02-28	10-K	24-000022
31	shares outstanding	dei:EntityCommonStockSharesOutstanding	34,663,118	2026-02-23	2026-02-26	10-K	26-000014
32	shares outstanding	dei:EntityCommonStockSharesOutstanding	34,429,989	2025-02-24	2025-02-27	10-K	25-000024

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