Endovia Health Sciences, Inc.

EDVA

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

E

weakest fifth of 125 graded peers in consumer nondurables

rank 123 of 125; percentile 98.4; sampling error 3.8 points; lower is stronger

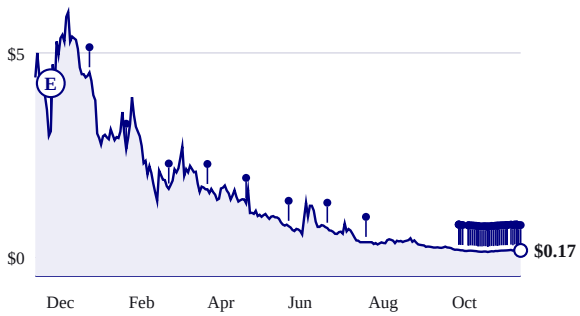
A B C D E

E, the bear



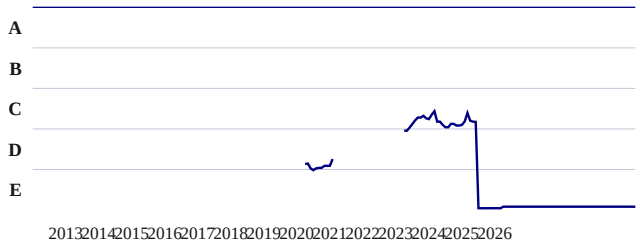
Scoreboard	
Profitability	C percentile 47.2
Solvency	E percentile 93.8
Growth and financing	E percentile 99.6
Reliability	0.76 AUC filers with under $12.5M assets; 95% interval 0.65 to 0.86; 63 events, 2020 to 2025
Peer failure rate	0.60% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	under $12.5M assets total assets $965,694
Standard universe	outside revenue above $1M and assets above $10M
Warnings	short runway, late filer, degenerate in... not computable: dilution, distress
Inputs computable	7 of 14
Graded from	filings received through Apr 30, 2026 196 days before the rescan; latest periodic filing 10-Q received Aug 19, 2026
Last close	$0.18 2026-11-11; 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						

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Accruals ratio	(1,096.1%)	(5.2%)	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 93.8					
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)	3.06	100.0	120	2025-12-31
Net debt to EBITDA	not computable	2.58x			
EBITDA must exceed $100,000					
Interest coverage	(5.62x)	2.36x	81.4	44	2025-12-31
Current ratio	0.04x	1.79x	100.0	154	2025-12-31
Growth and financing, sleeve percentile 99.6					
Revenue growth, three-year compound	(84.1%)	0.06%	100.0	134	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	0.05%			
prior share count is 8 days earlier					

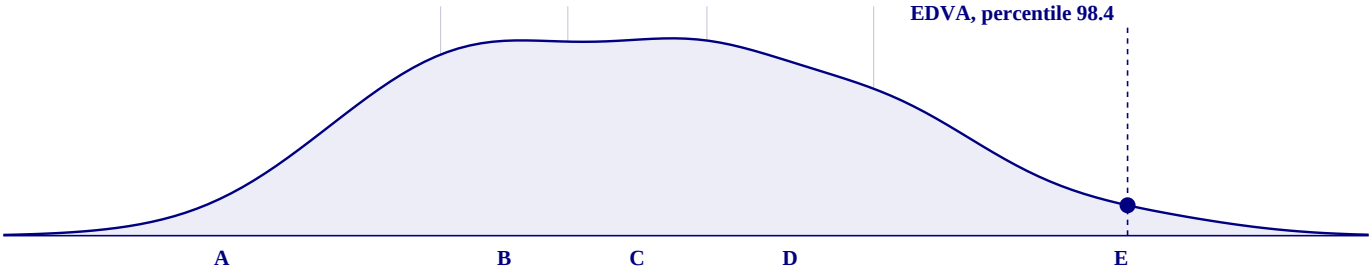
Warnings

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 125 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
118	Mondelez International, Inc. (MDLZ)	94.4	E	
119	Hain Celestial Group Inc. (HAIN)	95.2	E	fortress balance sheet
120	Limoneira Co. (LMNR)	96.0	E	
121	Blue Star Foods Corp. (BSFC)	96.8	E	dilution, late filer, fortress balance sheet
122	Reed'S, Inc. (REED)	97.6	E	
123	Endovia Health Sciences, Inc. (EDVA)	98.4	E	short runway, late filer, degenerate inputs, fortress balance sheet
124	22nd Century Group, Inc. (XXII)	99.2	E	dilution, fortress balance sheet

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125	Planet Green Holdings Corp. (PLAG)	100.0	E	dilution, late filer, fortress balance sheet

What the price implies

at the 2026-11-11 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	(97.1%)	(19.7%)	2
EBIT to enterprise value	(1,629.2%)	3.2%	0
Free cash flow yield	(656.7%)	3.9%	1
Book value to price	(14.16)	0.54	0
Sales to price	0.07	1.18	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	85 (10-Q received Aug 19, 2026)
Median daily dollar volume, 63 sessions	$97,835

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

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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
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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