Uniti Group Inc.

UNIT

Nasdaq; telecom; SIC 4813, Telephone Communications (No Radiotelephone); CIK 0002020795

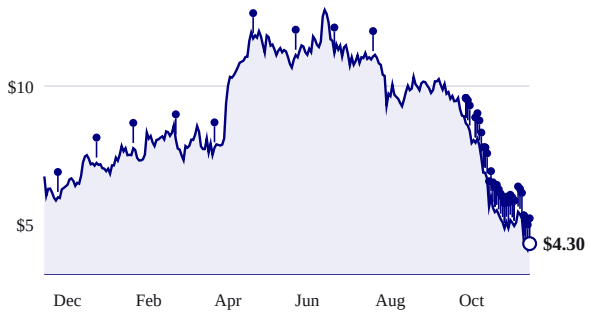
None

No letter

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

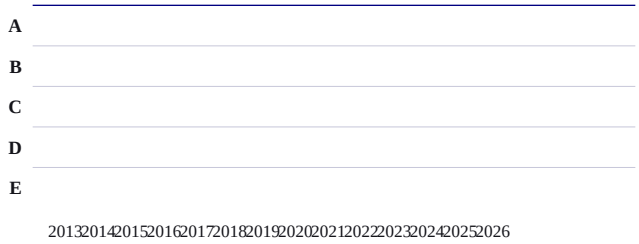
Scoreboard	
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $12.0B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	thin data not computable: dilution, distress
Inputs computable	2 of 14
Graded from	filings received through Mar 2, 2026 256 days before the rescan; latest periodic filing 10-Q received Nov 9, 2026
Last close	$4.28 2026-11-12; market equity $1.0B; 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 Mar 2, 2026

Uniti Group Inc. (herein referred to as the "Company," "Uniti," "we," "us," or "our") was incorporated in the State of Delaware on April 19, 2024, under the name "Windstream Parent, Inc" and as a subsidiary of New Windstream, LLC ("Windstream") (as successor to Windstream Holdings II, LLC) in connection with the Merger (as defined below). Uniti is a premier digital infrastructure company with approximately 240,000 fiber route miles across 47 states.

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						
Gross profitability	not computable	28.4%				
one or more required annual facts are missing						
Return on invested capital	not computable	8.9%				
a prior annual debt, equity, and cash observation is required						

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Accruals ratio	not computable	(7.3%)			
a prior annual assets observation is required					
Gross margin stability, five years	not computable	2.3 pts			
five annual gross margins are required; found 0					
Solvency, sleeve percentile 92.3					
Twelve-month failure probability	not computable	0.05%			
latest liabilities, cash plus short-term investments, book equity, and shares are required					
Altman Z double-prime	not computable	2.01			
one or more required annual facts are missing					
Net debt to EBITDA	12.07x	1.69x	95.7	188	2025-12-31
Interest coverage	not computable	2.81x			
one or more required annual facts are missing					
Current ratio	0.74x	1.96x	88.9	752	2025-12-31
Growth and financing					
Revenue growth, three-year compound	not computable	5.9%			
four annual observations are required; found 1					
Free cash flow growth, three-year compound	not computable	15.2%			
four consecutive annual FCF observations are required; found 0					
Reinvestment rate	not computable	16.2%			
one or more required annual facts are missing					
Asset growth, three years	not computable	4.2%			
four annual observations are required; found 1					
Net share issuance, one year	not computable	0.6%			
two annual share counts are required; found 1					

Warnings

1 of 7 checks triggered; none of them enters the letter

Check	Measured
Thin data	2 of 14 grade factors are computable; minimum is 7

What the price implies

at the 2026-11-12 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	45.5%	(3.1%)	78
Distance from 52-week high	(66.3%)	(32.7%)	17
EBIT to enterprise value	2.3%	1.7%	55
Free cash flow yield	not computable	2.8%	
Book value to price	(0.08)	0.27	6
Sales to price	2.14	0.33	87
Composite equity issuance, five years	not computable	3.6%	
Relative strength against the sector, log excess return	0.40	(0.26)	89

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	pass
Return on assets improved	fail
Operating cash flow exceeds net income	fail
Long-term leverage fell	fail
Current ratio improved	fail

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No new shares issued	fail
Gross margin improved	fail
Asset turnover improved	fail

Cash, filings, liquidity

Cash and equivalents	$861.5M
Operating cash flow, four quarters	$587.5M
Months of runway	not finite
Days since last periodic filing	4 (10-Q received Nov 9, 2026)
Median daily dollar volume, 63 sessions	$21.7M

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	operating income	us-gaap:OperatingIncomeLoss	$262.0M	2025-12-31	2026-03-02	10-K	26-013196
2	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$1.2B	2025-12-31	2026-03-02	10-K	26-013196
3	income tax	us-gaap:IncomeTaxExpenseBenefit	-$136.5M	2025-12-31	2026-03-02	10-K	26-013196
4	total debt	us-gaap:LongTermDebt	$9.5B	2025-12-31	2026-03-02	10-K	26-013196
5	book equity	us-gaap:StockholdersEquity	$380.3M	2025-12-31	2026-03-02	10-K	26-013196
6	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$53.5M	2025-12-31	2026-03-02	10-K	26-013196
7	net income	us-gaap:NetIncomeLoss	$1.3B	2025-12-31	2026-03-02	10-K	26-013196
8	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$350.2M	2025-12-31	2026-03-02	10-K	26-013196
9	assets	us-gaap:Assets	$12.0B	2025-12-31	2026-03-02	10-K	26-013196
10	depreciation amortization	us-gaap:Depreciation	$522.8M	2025-12-31	2026-03-02	10-K	26-013196
11	current assets	us-gaap:AssetsCurrent	$831.0M	2025-12-31	2026-03-02	10-K	26-013196
12	current liabilities	us-gaap:LiabilitiesCurrent	$1.1B	2025-12-31	2026-03-02	10-K	26-013196
13	revenue	us-gaap:Revenues	$2.2B	2025-12-31	2026-03-02	10-K	26-013196
14	shares outstanding	dei:EntityCommonStockSharesOutstanding	239,073,223	2026-02-23	2026-03-02	10-K	26-013196

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