SCWorx Corp.

WORX

Nasdaq; business equipment; SIC 7374, Services-Computer Processing & Data Preparation; CIK 0001674227

E

weakest fifth of 494 graded peers in business equipment

rank 415 of 494; percentile 84.0; sampling error 2.2 points; lower is stronger

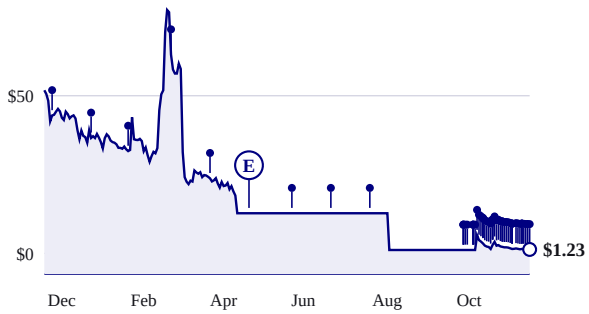
A B C D E

E, the bear



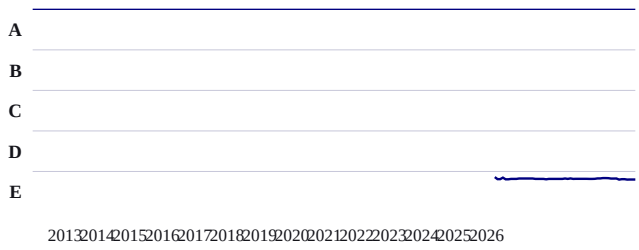
Scoreboard	
Profitability	C percentile 45.0
Solvency	C percentile 54.4
Growth and financing	E percentile 87.0
Reliability	0.76 AUC filers with under $12.5M assets; 95% interval 0.65 to 0.86; 63 events, 2020 to 2025
Peer failure rate	0.60% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	under $12.5M assets total assets $7.9M
Standard universe	outside revenue above $1M and assets above $10M
Warnings	dilution not computable: short runway, distress, fortress balance sheet
Inputs computable	7 of 14
Graded from	filings received through Mar 31, 2026 230 days before the rescan; latest periodic filing 10-Q received Aug 14, 2026
Last close	$1.34 2026-11-11; market equity $120,317; 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 31, 2026

Corp.) ("SCW LLC") was a privately held limited liability company which was organized in Florida on November 17, 2016. On December 31, 2017, SCW LLC acquired Primrose Solutions, LLC ("Primrose"), a Delaware limited liability company, which became its wholly-owned subsidiary and focused on developing functionality for the software now used and sold by SCWorx Corp. (the "Company" or "SCWorx"). The majority interest holders of Primrose were interest holders of SCW LLC and based upon Staff Accounting Bulletin Topic 5G, the technology acquired has been accounted for at predecessor cost of $0.

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 45.0						
Gross profitability	11.6%	28.7%		81.4	550	2025-12-31
Return on invested capital	not computable	11.2%				
one or more required annual facts are missing						

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Accruals ratio	(40.7%)	(7.3%)	8.5	613	2025-12-31
Gross margin stability, five years	not computable	2.3 pts			
five consecutive annual gross margins are required					
Solvency, sleeve percentile 54.4					
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	(4.28)	2.21	74.5	561	2025-12-31
Net debt to EBITDA	not computable	1.09x			
one or more required annual facts are missing					
Interest coverage	not computable	3.77x			
interest expense must exceed $100,000					
Current ratio	2.72x	2.01x	34.4	658	2025-12-31
Growth and financing, sleeve percentile 87.0					
Revenue growth, three-year compound	(10.7%)	6.4%	87.7	531	2025-12-31
Free cash flow growth, three-year compound	not computable	17.7%			
four consecutive annual FCF observations are required; found 1					
Reinvestment rate	not computable	15.1%			
required facts have no common fiscal period end					
Asset growth, three years	(5.1%)	5.2%	74.4	555	2025-12-31
Net share issuance, one year	659.9%	0.5%	98.8	406	2026-03-31

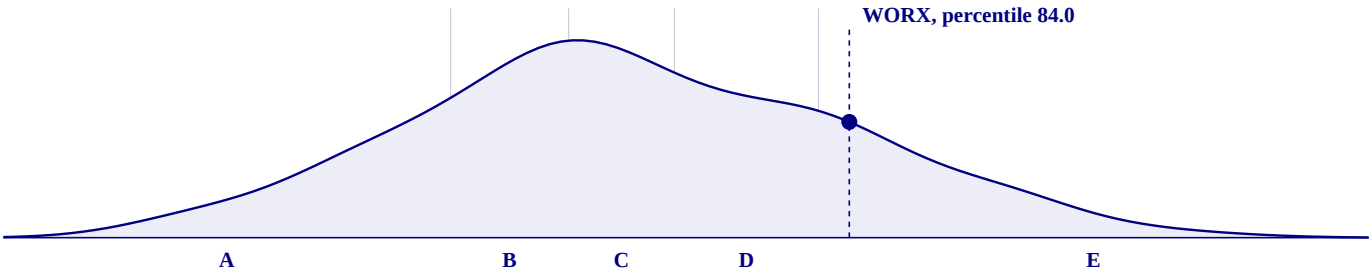
Warnings

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

Check	Measured
Dilution	split-adjusted year-over-year share growth is 659.9%

Among 494 peers

business equipment; 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
410	Healthstream Inc. (HSTM)	83.0	E	
411	Ribbon Communications Inc. (RBBN)	83.2	E	
412	Microvision, Inc. (MVIS)	83.4	E	short runway, fortress balance sheet
413	Rockwell Automation, Inc. (ROK)	83.6	E	
414	Vontier Corp. (VNT)	83.8	E	
415	SCWorx Corp. (WORX)	84.0	E	dilution
416	Marqeta, Inc. (MQ)	84.2	E	
417	Methode Electronics Inc. (MEI)	84.4	E	
418	Magnite, Inc. (MGNI)	84.6	E	
419	Vistance Networks, Inc. (VISN)	84.8	E	
420	Neonode Inc. (NEON)	85.0	E	

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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	(98.1%)	(2.0%)	1
Distance from 52-week high	(98.4%)	(35.0%)	1
EBIT to enterprise value	not computable	1.7%	
Free cash flow yield	(4,348.9%)	2.8%	0
Book value to price	62.77	0.27	100
Sales to price	26.06	0.32	99
Composite equity issuance, five years	318.5%	4.4%	96
Relative strength against the sector, log excess return	(4.22)	(0.29)	1

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	fail
Current ratio improved	pass
No new shares issued	fail
Gross margin improved	pass
Asset turnover improved	fail
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	94 (10-Q received Aug 14, 2026)
Median daily dollar volume, 63 sessions	$0

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	$919,706	2025-12-31	2026-03-31	10-K	26-037303
2	assets	us-gaap:Assets	$7.9M	2025-12-31	2026-03-31	10-K	26-037303
3	net income	us-gaap:NetIncomeLoss	-$4.4M	2025-12-31	2026-03-31	10-K	26-037303
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$1.5M	2025-12-31	2026-03-31	10-K	26-037303
5	assets	us-gaap:Assets	$6.3M	2024-12-31	2026-03-31	10-K	26-037303
6	current assets	us-gaap:AssetsCurrent	$2.0M	2025-12-31	2026-03-31	10-K	26-037303
7	current liabilities	us-gaap:LiabilitiesCurrent	$743,596	2025-12-31	2026-03-31	10-K	26-037303
8	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$35.4M	2025-12-31	2026-03-31	10-K	26-037303
9	operating income	us-gaap:OperatingIncomeLoss	-$958,719	2025-12-31	2026-03-31	10-K	26-037303
10	book equity	us-gaap:StockholdersEquity	$7.2M	2025-12-31	2026-03-31	10-K	26-037303
11	liabilities	us-gaap:Liabilities	$743,596	2025-12-31	2026-03-31	10-K	26-037303
12	operating income	us-gaap:OperatingIncomeLoss	-$11.9M	2019-12-31	2021-05-19	10-K	21-027941
13	interest expense	us-gaap:InterestExpense	$23,720	2019-12-31	2021-05-19	10-K	21-027941
14	revenue	us-gaap:Revenues	$2.9M	2025-12-31	2026-03-31	10-K	26-037303
15	revenue	us-gaap:Revenues	$3.0M	2024-12-31	2026-03-31	10-K	26-037303
16	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$3.8M	2023-12-31	2024-09-24	10-K	24-081111
17	revenue	us-gaap:Revenues	$4.0M	2022-12-31	2023-04-17	10-K	23-030171
18	assets	us-gaap:Assets	$6.3M	2023-12-31	2025-03-31	10-K	25-026169

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19	assets	us-gaap:Assets	$9.2M	2022-12-31	2024-09-24	10-K	24-081111
20	shares outstanding	dei:EntityCommonStockSharesOutstanding	15,999,423	2026-03-31	2026-03-31	10-K	26-037303
21	shares outstanding	dei:EntityCommonStockSharesOutstanding	2,105,755	2025-03-31	2025-03-31	10-K	25-026169

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