Onterris, Inc.

ONT

NYSE; other; SIC 8742, Services-Management Consulting Services; CIK 0001643615

C

middle fifth of 315 graded peers in other

rank 143 of 315; percentile 45.2; sampling error 2.7 points; lower is stronger

A B C D E

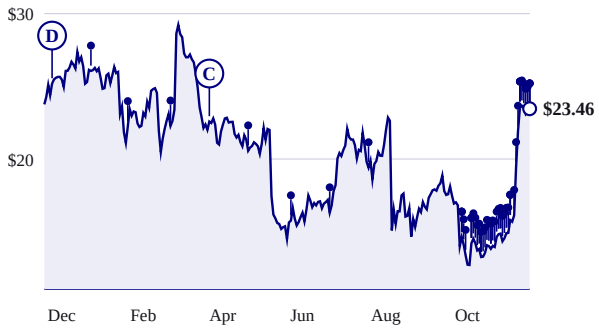
C, the tortoise



Scoreboard

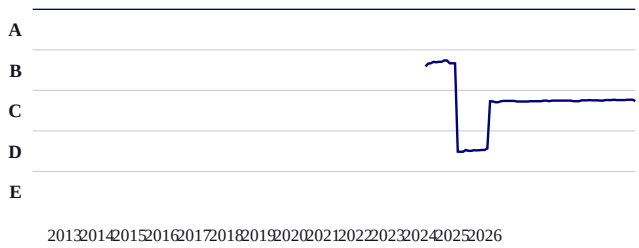
Profitability	B/C percentile 40.8
Solvency	D percentile 66.0
Growth and financing	B percentile 34.6
Reliability	0.91 AUC filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025
Peer failure rate	1.01% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$591M to $2.67B assets total assets $981.3M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress
Inputs computable	10 of 13
Graded from	filings received through Feb 26, 2026 264 days before the rescan; latest periodic filing 10-Q received Nov 5, 2026
Last close	$23.48 2026-11-16; market equity $825.3M; 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

Since our inception in 2012, our mission has been to help clients and communities meet their environmental goals and needs. We service complex and often non-discretionary environmental needs of our diverse clients across our three business segments: Assessment, Permitting and Response; Measurement and Analysis; and Remediation and Reuse. Examples of our services include: Our industry is highly fragmented with no single market leader. By focusing solely on environmental solutions, we believe we are uniquely positioned to become a leading platform in the environmental industry.

The thirteen 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 40.8						
Gross profitability	34.1%	26.9%		35.6	265	2025-12-31
Return on invested capital	not computable	10.1%				

pretax income must exceed the validity floor and imply a 0%-100% tax rate

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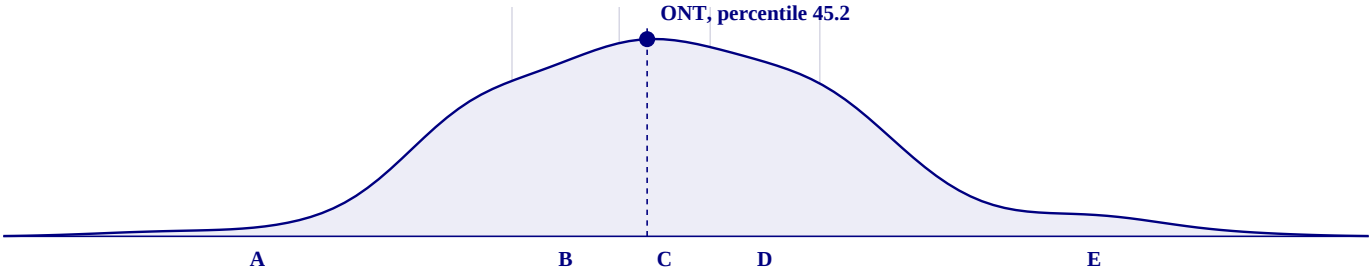
Accruals ratio	(11.0%)	(5.8%)	23.4	458	2025-12-31
Gross margin stability, five years	3.0 pts	2.1 pts	63.4	195	2025-12-31
Solvency, sleeve percentile 66.0					
Altman Z double-prime	0.55	2.06	59.0	357	2025-12-31
Net debt to EBITDA	11.07x	2.37x	94.2	173	2025-12-31
Interest coverage	not computable	2.93x			
one or more required annual facts are missing					
Current ratio	1.43x	1.32x	44.9	462	2025-12-31
Growth and financing, sleeve percentile 34.6					
Revenue growth, three-year compound	15.1%	5.1%	19.1	377	2025-12-31
Free cash flow growth, three-year compound	102.0%	8.9%	4.7	213	2025-12-31
Reinvestment rate	not computable	12.4%			
pretax income must exceed the validity floor and imply a 0%-100% tax rate					
Asset growth, three years	7.4%	4.1%	35.7	402	2025-12-31
Net share issuance, one year	4.8%	(0.6%)	78.9	352	2026-02-20

Among 315 peers

other; 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
138	Werner Enterprises Inc. (WERN)	43.6	C	
139	V2X, Inc. (VVX)	43.9	C	
140	TSS, Inc. (TSSI)	44.3	C	late filer, fortress balance sheet
141	EVgo Inc. (EVGO)	44.6	C	
142	Aecom (ACM)	44.9	C	
143	Onterris, Inc. (ONT)	45.2	C	
144	Freeport-Mcmoran Inc. (FCX)	45.5	C	
145	Everforth Inc. (EFOR)	45.9	C	
146	Fortune Brands Innovations, Inc. (FBIN)	46.2	C	
147	Ebay Inc. (EBAY)	46.5	C	
148	Resources Connection, Inc. (RGP)	46.8	C	

What the price implies

at the 2026-11-16 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(48.3%)	(0.7%)	11
Distance from 52-week high	(19.7%)	(23.6%)	57
EBIT to enterprise value	1.1%	4.4%	23
Free cash flow yield	11.1%	4.2%	86
Book value to price	0.55	0.36	70
Sales to price	1.01	0.71	61
Composite equity issuance, five years	33.3%	(9.4%)	89
Relative strength against the sector, log excess return	(0.78)	(0.13)	11

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Twelve-month failure probability, CHS model	not computable	0.03%

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 4 of 9, period end 2025-12-31	
Return on assets above zero	fail
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	pass
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$20.1M
Operating cash flow, four quarters	$87.3M
Months of runway	not finite
Days since last periodic filing	12 (10-Q received Nov 5, 2026)
Median daily dollar volume, 63 sessions	$9.3M

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	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$830.5M	2025-12-31	2026-02-26	10-K	26-076511
2	cost of revenue	us-gaap:CostOfRevenue	$496.2M	2025-12-31	2026-02-26	10-K	26-076511
3	assets	us-gaap:Assets	$981.3M	2025-12-31	2026-02-26	10-K	26-076511
4	operating income	us-gaap:OperatingIncomeLoss	$11.7M	2025-12-31	2026-02-26	10-K	26-076511
5	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$11.2M	2025-12-31	2026-02-26	10-K	26-076511
6	income tax	us-gaap:IncomeTaxExpenseBenefit	$12.1M	2025-12-31	2026-02-26	10-K	26-076511
7	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$277.1M	2025-12-31	2026-02-26	10-K	26-076511
8	book equity	us-gaap:StockholdersEquity	$451.2M	2025-12-31	2026-02-26	10-K	26-076511
9	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$11.2M	2025-12-31	2026-02-26	10-K	26-076511
10	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$204.8M	2024-12-31	2026-02-26	10-K	26-076511
11	book equity	us-gaap:StockholdersEquity	$446.3M	2024-12-31	2026-02-26	10-K	26-076511
12	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$12.9M	2024-12-31	2026-02-26	10-K	26-076511
13	net income	us-gaap:NetIncomeLoss	-$843,000	2025-12-31	2026-02-26	10-K	26-076511
14	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$107.5M	2025-12-31	2026-02-26	10-K	26-076511
15	assets	us-gaap:Assets	$990.4M	2024-12-31	2026-02-26	10-K	26-076511
16	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$696.4M	2024-12-31	2026-02-26	10-K	26-076511
17	cost of revenue	us-gaap:CostOfRevenue	$418.2M	2024-12-31	2026-02-26	10-K	26-076511
18	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$624.2M	2023-12-31	2026-02-26	10-K	26-076511
19	cost of revenue	us-gaap:CostOfRevenue	$383.9M	2023-12-31	2026-02-26	10-K	26-076511
20	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$544.4M	2022-12-31	2025-03-03	10-K	25-030806
21	cost of revenue	us-gaap:CostOfRevenue	$351.9M	2022-12-31	2025-03-03	10-K	25-030806
22	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$546.4M	2021-12-31	2024-02-29	10-K	24-023043
23	cost of revenue	us-gaap:CostOfRevenue	$369.0M	2021-12-31	2024-02-29	10-K	24-023043
24	current assets	us-gaap:AssetsCurrent	$240.4M	2025-12-31	2026-02-26	10-K	26-076511
25	current liabilities	us-gaap:LiabilitiesCurrent	$168.0M	2025-12-31	2026-02-26	10-K	26-076511
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$273.5M	2025-12-31	2026-02-26	10-K	26-076511
27	liabilities	us-gaap:Liabilities	$530.1M	2025-12-31	2026-02-26	10-K	26-076511
28	depreciation amortization	us-gaap:Depreciation	$12.3M	2025-12-31	2026-02-26	10-K	26-076511
29	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$16.3M	2025-12-31	2026-02-26	10-K	26-076511
30	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$22.2M	2024-12-31	2026-02-26	10-K	26-076511

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31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$21.3M	2024-12-31	2026-02-26	10-K	26-076511
32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$56.0M	2023-12-31	2026-02-26	10-K	26-076511
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$29.6M	2023-12-31	2026-02-26	10-K	26-076511
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$20.6M	2022-12-31	2025-03-03	10-K	25-030806
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$9.6M	2022-12-31	2025-03-03	10-K	25-030806
36	current assets	us-gaap:AssetsCurrent	$238.0M	2024-12-31	2026-02-26	10-K	26-076511
37	current liabilities	us-gaap:LiabilitiesCurrent	$158.7M	2024-12-31	2026-02-26	10-K	26-076511
38	assets	us-gaap:Assets	$816.8M	2023-12-31	2025-03-03	10-K	25-030806
39	assets	us-gaap:Assets	$791.9M	2022-12-31	2024-02-29	10-K	24-023043
40	shares outstanding	dei:EntityCommonStockSharesOutstanding	35,980,650	2026-02-20	2026-02-26	10-K	26-076511
41	shares outstanding	dei:EntityCommonStockSharesOutstanding	34,339,764	2025-02-21	2025-03-03	10-K	25-030806

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