Vivos Therapeutics, Inc.

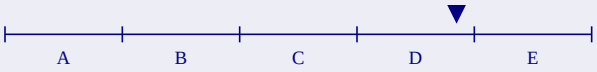
VVOS

Nasdaq; healthcare; SIC 3841, Surgical & Medical Instruments & Apparatus; CIK 0001716166

D

fourth fifth of 305 graded peers in healthcare

rank 235 of 305; percentile 77.0; sampling error 2.8 points; lower is stronger



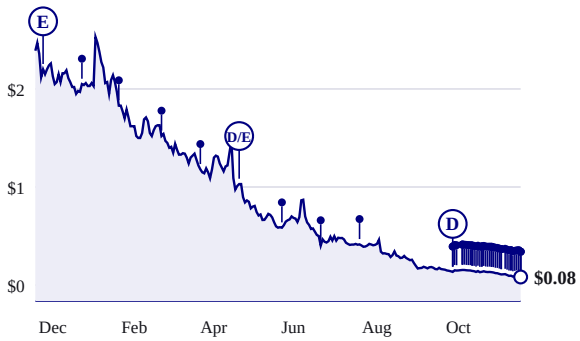
D, the sloth



Scoreboard

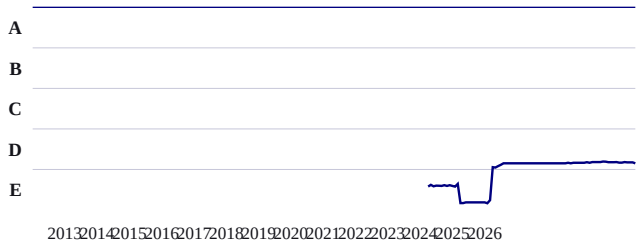
Profitability	B/C percentile 39.0
Solvency	D/E percentile 79.9
Growth and financing	C percentile 56.3
Reliability	0.83 AUC filers with $12.5M to $120M assets; 95% interval 0.79 to 0.86; 201 events, 2020 to 2025
Peer failure rate	1.07% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$12.5M to $120M assets total assets $25.2M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	dilution, short runway, late filer not computable: distress
Inputs computable	9 of 13
Graded from	filings received through Apr 15, 2026 216 days before the rescan; latest periodic filing 10-Q received Nov 16, 2026
Last close	$0.08 2026-11-16; market equity $2.9M; 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

are a revenue stage medical technology and healthcare services company that features a comprehensive suite of proprietary oral appliances and therapeutic treatments. Our products non-surgically treat certain maxillofacial and developmental abnormalities of the mouth and jaws that are closely associated with breathing and sleep disorders such as mild to severe obstructive sleep apnea (known as OSA) and snoring in adults. We call the use of our appliances coupled with specific therapeutic treatment protocols The Vivos Method.

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 39.0						
Gross profitability	41.9%	32.8%		30.4	346	2025-12-31
Return on invested capital	not computable	9.6%				
one or more required annual facts are missing						

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Accruals ratio	(29.2%)	(6.7%)	13.2	756	2025-12-31
Gross margin stability, five years	5.6 pts	2.8 pts	73.3	237	2025-12-31
Solvency, sleeve percentile 79.9					
Altman Z double-prime	(25.19)	0.31	78.8	705	2025-12-31
Net debt to EBITDA	not computable	1.82x			
EBITDA must exceed $100,000					
Interest coverage	(14.21x)	(3.61x)	63.0	74	2025-12-31
Current ratio	0.24x	2.68x	97.9	781	2025-12-31
Growth and financing, sleeve percentile 56.3					
Revenue growth, three-year compound	2.9%	9.6%	64.2	400	2025-12-31
Free cash flow growth, three-year compound	not computable	11.1%			
current FCF must be positive and base FCF must exceed $100,000					
Reinvestment rate	not computable	33.9%			
one or more required annual facts are missing					
Asset growth, three years	22.4%	3.2%	18.9	663	2025-12-31
Net share issuance, one year	129.0%	1.6%	85.7	624	2026-04-15

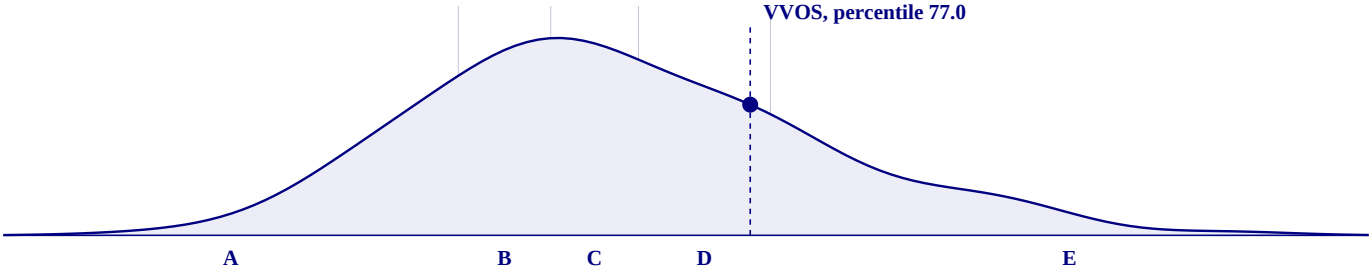
Warnings

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

Check	Measured
Dilution	split-adjusted year-over-year share growth is 129.0%
Short runway	cash runway is 0.2 months
Late filer	found 4 NT 10-K/Q filings in the last eight quarters

Among 305 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
230	Precision Optics Corporation, Inc. (POCI)	75.3	D	dilution, fortress balance sheet
231	NutriBand Inc. (NTRB)	75.7	D	fortress balance sheet
232	Teleflex Inc. (TFX)	76.0	D	
233	Whitehawk Therapeutics, Inc. (WHWK)	76.3	D	
234	Standard Biotools Inc. (LAB)	76.6	D	late filer, fortress balance sheet
235	Vivos Therapeutics, Inc. (VVOS)	77.0	D	dilution, short runway, late filer
236	Baxter International Inc. (BAX)	77.3	D/E	
237	Cytosorbents Corp. (CTSO)	77.6	D/E	short runway, fortress balance sheet
238	biote Corp. (BTMD)	78.0	D/E	
239	Abeona Therapeutics Inc. (ABEO)	78.3	D/E	fortress balance sheet
240	Quest Diagnostics Inc. (DGX)	78.6	D/E	

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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	(94.3%)	(1.7%)	1
Distance from 52-week high	(96.8%)	(31.5%)	1
EBIT to enterprise value	(648.8%)	0.5%	2
Free cash flow yield	(633.2%)	0.5%	0
Book value to price	0.85	0.28	81
Sales to price	6.27	0.36	98
Composite equity issuance, five years	383.8%	13.2%	97
Relative strength against the sector, log excess return	(3.03)	(0.19)	1
Twelve-month failure probability, CHS model	not computable	0.06%	

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 3 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	pass
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$247,000
Operating cash flow, four quarters	-$16.1M
Months of runway	0.2
Days since last periodic filing	1 (10-Q received Nov 16, 2026)
Median daily dollar volume, 63 sessions	$178,538

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	$10.5M	2025-12-31	2026-04-15	10-K	26-016854
2	assets	us-gaap:Assets	$25.2M	2025-12-31	2026-04-15	10-K	26-016854
3	net income	us-gaap:NetIncomeLoss	-$21.2M	2025-12-31	2026-04-15	10-K	26-016854
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$15.3M	2025-12-31	2026-04-15	10-K	26-016854
5	assets	us-gaap:Assets	$15.3M	2024-12-31	2026-04-15	10-K	26-016854
6	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$17.4M	2025-12-31	2026-04-15	10-K	26-016854
7	gross profit	us-gaap:GrossProfit	$9.0M	2024-12-31	2026-04-15	10-K	26-016854
8	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$15.0M	2024-12-31	2026-04-15	10-K	26-016854
9	gross profit	us-gaap:GrossProfit	$8.3M	2023-12-31	2025-03-31	10-K	25-001750
10	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$13.8M	2023-12-31	2025-03-31	10-K	25-001750
11	gross profit	us-gaap:GrossProfit	$10.0M	2022-12-31	2024-07-30	10-K/A	24-029491
12	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$16.0M	2022-12-31	2024-07-30	10-K/A	24-029491
13	gross profit	us-gaap:GrossProfit	$12.6M	2021-12-31	2023-03-30	10-K	23-009765
14	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$16.9M	2021-12-31	2023-03-30	10-K	23-009765
15	current assets	us-gaap:AssetsCurrent	$4.4M	2025-12-31	2026-04-15	10-K	26-016854
16	current liabilities	us-gaap:LiabilitiesCurrent	$18.1M	2025-12-31	2026-04-15	10-K	26-016854
17	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$125.4M	2025-12-31	2026-04-15	10-K	26-016854

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18	operating income	us-gaap:OperatingIncomeLoss	-$19.9M	2025-12-31	2026-04-15	10-K	26-016854
19	book equity	us-gaap:StockholdersEquity	-$1.5M	2025-12-31	2026-04-15	10-K	26-016854
20	liabilities	us-gaap:Liabilities	$26.7M	2025-12-31	2026-04-15	10-K	26-016854
21	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$2.9M	2025-12-31	2026-04-15	10-K	26-016854
22	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$2.0M	2025-12-31	2026-04-15	10-K	26-016854
23	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$1.3M	2025-12-31	2026-04-15	10-K	26-016854
24	interest expense	us-gaap:InterestExpense	$1.4M	2025-12-31	2026-04-15	10-K	26-016854
25	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$2.3M	2025-12-31	2026-04-15	10-K	26-016854
26	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$12.7M	2024-12-31	2026-04-15	10-K	26-016854
27	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$568,000	2024-12-31	2026-04-15	10-K	26-016854
28	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$11.9M	2023-12-31	2025-03-31	10-K	25-001750
29	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$803,000	2023-12-31	2025-03-31	10-K	25-001750
30	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$19.6M	2022-12-31	2024-07-30	10-K/A	24-029491
31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$924,000	2022-12-31	2024-07-30	10-K/A	24-029491
32	assets	us-gaap:Assets	$10.7M	2023-12-31	2025-03-31	10-K	25-001750
33	assets	us-gaap:Assets	$13.7M	2022-12-31	2024-07-30	10-K/A	24-029491
34	shares outstanding	dei:EntityCommonStockSharesOutstanding	13,486,006	2026-04-15	2026-04-15	10-K	26-016854
35	shares outstanding	dei:EntityCommonStockSharesOutstanding	5,889,520	2025-03-31	2025-03-31	10-K	25-001750

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