SCWorx Corp.

WORX

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

E

weakest fifth of 469 graded peers in business equipment

rank 395 of 469; percentile 84.2; sampling error 2.3 points; lower is stronger

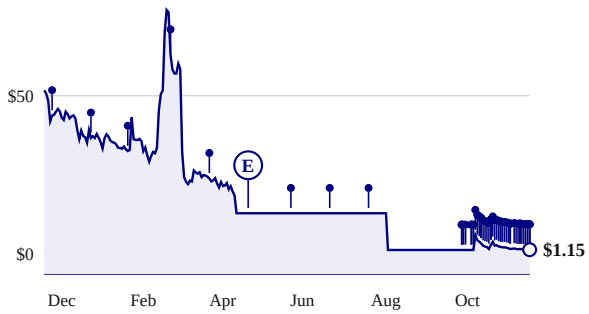
A B C D E

E, the bear



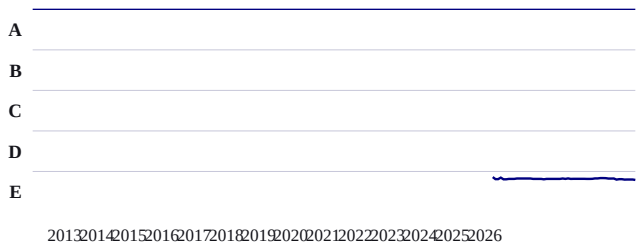
Scoreboard	
Profitability	C percentile 45.2
Solvency	C percentile 55.0
Growth and financing	E percentile 87.2
Reliability	0.76 AUC filers with under $12.5M assets; 95% interval 0.65 to 0.86; 63 events, 2020 to 2025
Peer failure rate	0.60% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	under $12.5M assets total assets $7.9M
Standard universe	outside revenue above $1M and assets above $10M
Warnings	dilution, late filer not computable: short runway, distress, fortress balance sheet
Inputs computable	7 of 13
Graded from	filings received through Mar 31, 2026 231 days before the rescan; latest periodic filing 10-Q received Aug 14, 2026
Last close	$1.21 2026-11-16; market equity $108,196; 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 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 45.2						
Gross profitability	11.6%	29.1%		82.8	512	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%)	(7.4%)		7.6	566	2025-12-31
Gross margin stability, five years	not computable	2.3 pts				
five consecutive annual gross margins are required						
Solvency, sleeve percentile 55.0						
Altman Z double-prime	(4.28)	2.19		76.1	516	2025-12-31
Net debt to EBITDA	not computable	1.15x				
one or more required annual facts are missing						
Interest coverage	not computable	4.90x				
interest expense must exceed $100,000						
Current ratio	2.72x	1.98x		33.9	599	2025-12-31
Growth and financing, sleeve percentile 87.2						
Revenue growth, three-year compound	(10.7%)	6.4%		87.8	502	2025-12-31
Free cash flow growth, three-year compound	not computable	18.2%				
four consecutive annual FCF observations are required; found 1						
Reinvestment rate	not computable	14.3%				
required facts have no common fiscal period end						
Asset growth, three years	(5.1%)	5.0%		74.9	519	2025-12-31
Net share issuance, one year	659.9%	0.5%		98.8	405	2026-03-31

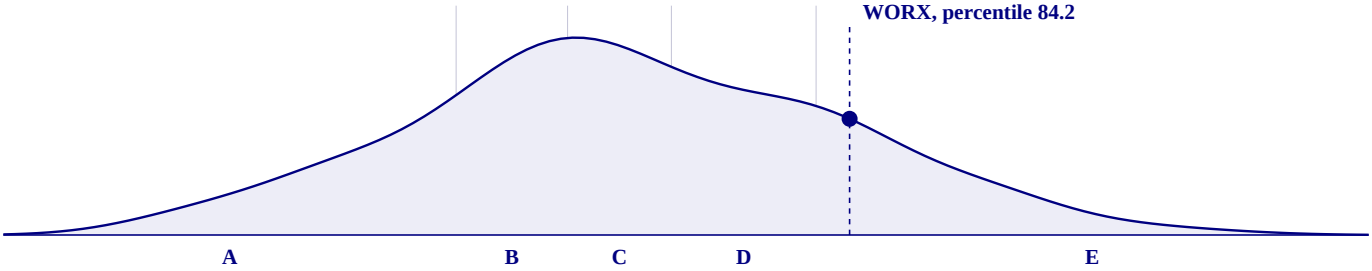
Warnings

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

Check	Measured
Dilution	split-adjusted year-over-year share growth is 659.9%
Late filer	found 1 NT 10-K/Q filings in the last eight quarters

Among 469 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
390	NCR Atleos Corp. (NATL)	83.1	E	
391	Healthstream Inc. (HSTM)	83.3	E	
392	Take TWO Interactive Software Inc. (TTWO)	83.5	E	
393	Ribbon Communications Inc. (RBBN)	83.8	E	
394	Rockwell Automation, Inc. (ROK)	84.0	E	
395	SCWorx Corp. (WORX)	84.2	E	dilution, late filer
396	Neonode Inc. (NEON)	84.4	E	
397	Vontier Corp. (VNT)	84.6	E	
398	Synopsys Inc. (SNPS)	84.8	E	
399	Marqeta, Inc. (MQ)	85.0	E	
400	Methode Electronics Inc. (MEI)	85.3	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	(98.1%)	(2.0%)	1
Distance from 52-week high	(98.5%)	(36.5%)	1
EBIT to enterprise value	not computable	1.8%	
Free cash flow yield	(4,651.4%)	2.9%	0
Book value to price	67.14	0.28	100
Sales to price	27.87	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
Twelve-month failure probability, CHS model	not computable	0.05%	

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	95 (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

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18	assets	us-gaap:Assets	$6.3M	2023-12-31	2025-03-31	10-K	25-026169
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