EON Resources Inc.

EONR

NYSE; energy; SIC 1311, Crude Petroleum & Natural Gas; CIK 0001842556

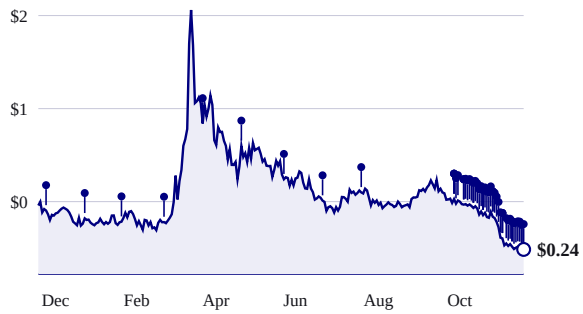
None

No letter

4 of 13 inputs computable; 7 are required, with a score in every sleeve

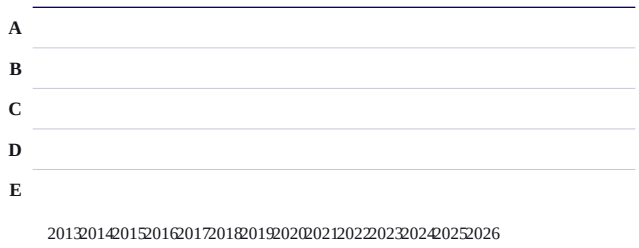
Scoreboard	
Reliability	0.83 AUC filers with $12.5M to $120M assets; 95% interval 0.79 to 0.86; 201 events, 2020 to 2025
Peer failure rate	1.07% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$12.5M to $120M assets total assets $90.5M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	short runway, late filer, thin data not computable: dilution, distress
Inputs computable	4 of 13
Graded from	filings received through Oct 13, 2026 36 days before the rescan; latest periodic filing 10-Q received Oct 22, 2026
Last close	$0.25 2026-11-17; market equity $0; 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 16, 2025

Market for Registrant's Common Equity, Related Stockholder Matters and Issuer Purchases of Equity Securities Management's Discussion and Analysis of Financial Condition and Results of Operations Changes in and Disagreements with Accountants on Accounting and Financial Disclosure Disclosure Regarding Foreign Jurisdictions That Prevent Inspections.

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 95.3						
Gross profitability	not computable	18.7%				
one or more required annual facts are missing						
Return on invested capital	not computable	6.3%				
pretax income must exceed the validity floor and imply a 0%-100% tax rate						
Accruals ratio	0.2%	(5.2%)		95.3	212	2025-12-31

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Gross margin stability, five years	not computable	4.4 pts			
five annual gross margins are required; found 0					
Solvency, sleeve percentile 92.9					
Altman Z double-prime	(2.06)	1.55	86.8	122	2025-12-31
Net debt to EBITDA	not computable	3.34x			
EBITDA must exceed $100,000					
Interest coverage	not computable	2.39x			
latest aligned inputs end 2023-11-14; latest annual assets end 2025-12-31					
Current ratio	0.12x	1.02x	99.1	222	2025-12-31
Growth and financing, sleeve percentile 23.3					
Revenue growth, three-year compound	not computable	2.2%			
four annual observations are required; found 3					
Free cash flow growth, three-year compound	not computable	(10.5%)			
four consecutive annual FCF observations are required; found 0					
Reinvestment rate	not computable	63.3%			
one or more required annual facts are missing					
Asset growth, three years	11.8%	6.9%	23.3	194	2025-12-31
Net share issuance, one year	not computable	0.3%			
firm-wide XBRL shares cannot be assigned to one ticker class					

Warnings

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

Check	Measured
Short runway	cash runway is 1.6 months
Late filer	found 6 NT 10-K/Q filings in the last eight quarters
Thin data	4 of 13 grade factors are computable; minimum is 7

What the price implies

at the 2026-11-17 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(3.6%)	8.0%	29
Distance from 52-week high	(84.1%)	(21.4%)	1
EBIT to enterprise value	not computable	4.7%	
Free cash flow yield	not computable	2.0%	
Book value to price	not computable	0.53	
Sales to price	not computable	0.51	
Composite equity issuance, five years	not computable	(7.9%)	
Relative strength against the sector, log excess return	(0.40)	0.06	16
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	pass
Operating cash flow exceeds net income	fail
Long-term leverage fell	pass
Current ratio improved	fail
No new shares issued	fail
Gross margin improved	fail

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Asset turnover improved	fail

Cash, filings, liquidity

Cash and equivalents	$691,672
Operating cash flow, four quarters	-$5.1M
Months of runway	1.6
Days since last periodic filing	27 (10-Q received Oct 22, 2026)
Median daily dollar volume, 63 sessions	$242,128

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	-$10.3M	2025-12-31	2026-10-13	10-K/A	26-108617
2	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$4.7M	2025-12-31	2026-10-13	10-K/A	26-108617
3	income tax	us-gaap:IncomeTaxExpenseBenefit	$2.8M	2025-12-31	2026-10-13	10-K/A	26-108617
4	total debt	us-gaap:LongTermDebt	$4.5M	2025-12-31	2026-10-13	10-K/A	26-108617
5	book equity	us-gaap:StockholdersEquity	$53.0M	2025-12-31	2026-10-13	10-K/A	26-108617
6	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$375,036	2025-12-31	2026-10-13	10-K/A	26-108617
7	total debt	us-gaap:LongTermDebt	$43.8M	2024-12-31	2026-04-27	10-K/A	26-047665
8	book equity	us-gaap:StockholdersEquity	$3.8M	2024-12-31	2026-10-13	10-K/A	26-108617
9	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$3.0M	2024-12-31	2026-04-27	10-K/A	26-047665
10	net income	us-gaap:NetIncomeLoss	-$7.5M	2025-12-31	2026-10-13	10-K/A	26-108617
11	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$7.6M	2025-12-31	2026-10-13	10-K/A	26-108617
12	assets	us-gaap:Assets	$90.5M	2025-12-31	2026-10-13	10-K/A	26-108617
13	assets	us-gaap:Assets	$102.7M	2024-12-31	2026-10-13	10-K/A	26-108617
14	current assets	us-gaap:AssetsCurrent	$3.1M	2025-12-31	2026-10-13	10-K/A	26-108617
15	current liabilities	us-gaap:LiabilitiesCurrent	$24.9M	2025-12-31	2026-10-13	10-K/A	26-108617
16	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$34.1M	2025-12-31	2026-10-13	10-K/A	26-108617
17	liabilities	us-gaap:Liabilities	$36.7M	2025-12-31	2026-10-13	10-K/A	26-108617
18	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$3.2M	2025-12-31	2026-10-13	10-K/A	26-108617
19	operating income	us-gaap:OperatingIncomeLoss	$7.4M	2023-11-14	2024-05-03	10-K	24-039259
20	interest expense	us-gaap:InterestExpense	$1.8M	2023-11-14	2024-05-03	10-K	24-039259
21	revenue	us-gaap:Revenues	$16.9M	2025-12-31	2026-10-13	10-K/A	26-108617
22	revenue	us-gaap:Revenues	$19.4M	2024-12-31	2026-10-13	10-K/A	26-108617
23	revenue	us-gaap:Revenues	$24.2M	2023-11-14	2024-05-03	10-K	24-039259
24	assets	us-gaap:Assets	$100.7M	2023-12-31	2026-04-27	10-K/A	26-047665
25	assets	us-gaap:Assets	$64.7M	2022-12-31	2024-05-03	10-K	24-039259

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