Endovia Health Sciences, Inc.

EDVA

NYSE; consumer nondurables; SIC 2080, Beverages; CIK 0001553788

E

weakest fifth of 118 graded peers in consumer nondurables

rank 116 of 118; percentile 98.3; sampling error 3.8 points; lower is stronger

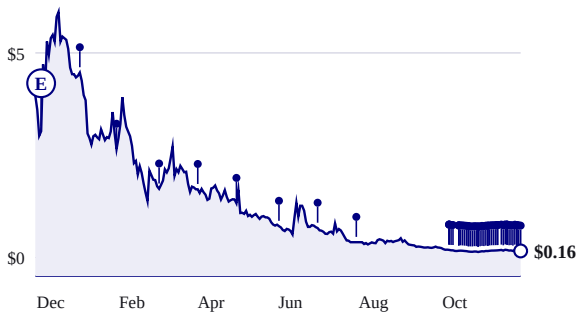
A B C D E

E, the bear



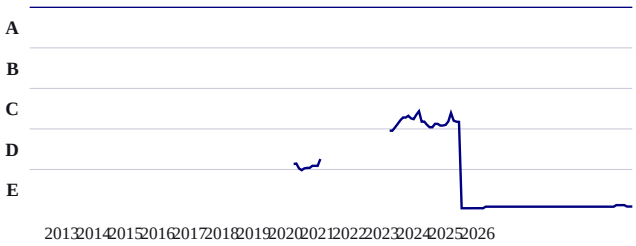
Scoreboard	
Profitability	C percentile 47.4
Solvency	E percentile 93.5
Growth and financing	E percentile 99.6
Reliability	0.76 AUC filers with under $12.5M assets; 95% interval 0.65 to 0.86; 63 events, 2020 to 2025
Peer failure rate	0.60% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	under $12.5M assets total assets $965,694
Standard universe	outside revenue above $1M and assets above $10M
Warnings	short runway, late filer, degenerate in... not computable: dilution, distress
Inputs computable	7 of 13
Graded from	filings received through Apr 30, 2026 203 days before the rescan; latest periodic filing 10-Q received Aug 19, 2026
Last close	$0.16 2026-11-18; market equity $1.0M; 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

The disclosure se forth in "Item 7 - Management's Discussion and Analysis of Financial Condition and Results of Operations - Liquidity and Capital Resources - Warrants" is incorporated During the three-month period ended December 31, 2025, no officer or director has adopted any Rule 10b5-1 trading arrangement or any non-Rule 10b5-1 trading arrangement within the meaning of Item 408 of Regulation S-K promulgated under the Securities Act of 1933. ITEM 9C. 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 47.4						
Gross profitability	1.7%	30.0%		94.8	135	2025-12-31
Return on invested capital	not computable	5.7%				
one or more required annual facts are missing						

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Accruals ratio	(1,096.1%)	(5.2%)	0.0	139	2025-12-31
Gross margin stability, five years	not computable	1.9 pts			
annual revenue must exceed $100,000					
Solvency, sleeve percentile 93.5					
Altman Z double-prime	(819.93)	3.11	100.0	110	2025-12-31
Net debt to EBITDA	not computable	2.44x			
EBITDA must exceed $100,000					
Interest coverage	(5.62x)	2.36x	80.6	37	2025-12-31
Current ratio	0.04x	1.82x	100.0	143	2025-12-31
Growth and financing, sleeve percentile 99.6					
Revenue growth, three-year compound	(84.1%)	(0.1%)	100.0	125	2025-12-31
Free cash flow growth, three-year compound	not computable	14.7%			
four consecutive annual FCF observations are required; found 9					
Reinvestment rate	not computable	11.8%			
one or more required annual facts are missing					
Asset growth, three years	(61.8%)	0.2%	99.2	125	2025-12-31
Net share issuance, one year	not computable	0.03%			
prior share count is 8 days earlier					

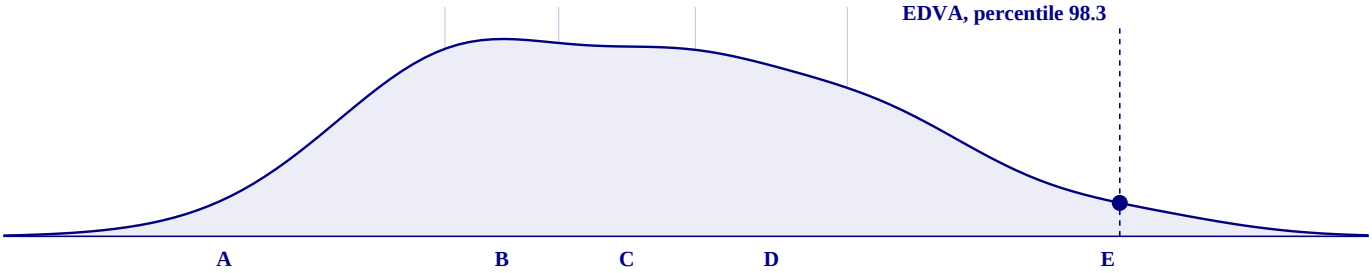
Warnings

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

Check	Measured
Short runway	cash runway is 0.5 months
Late filer	found 7 NT 10-K/Q filings in the last eight quarters
Degenerate inputs	latest revenue or assets are at or below the $100,000 validity floor
Fortress balance sheet	cash minus debt is 278,017 USD; Altman Z is not used

Among 118 peers

consumer nondurables; 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
111	Culp Inc. (CULP)	94.0	E	fortress balance sheet
112	Hain Celestial Group Inc. (HAIN)	94.9	E	fortress balance sheet
113	Limoneira Co. (LMNR)	95.7	E	
114	Reed'S, Inc. (REED)	96.6	E	
115	Arcadia Biosciences, Inc. (RKDA)	97.4	E	distress, fortress balance sheet
116	Endovia Health Sciences, Inc. (EDVA)	98.3	E	short runway, late filer, degenerate inputs, fortress balance sheet
117	22nd Century Group, Inc. (XXII)	99.1	E	dilution, fortress balance sheet
118	Planet Green Holdings Corp. (PLAG)	100.0	E	dilution, late filer, fortress balance sheet

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What the price implies

at the 2026-11-18 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(97.3%)	(1.0%)	2
Distance from 52-week high	(97.3%)	(21.1%)	2
EBIT to enterprise value	(1,803.2%)	3.5%	0
Free cash flow yield	(710.3%)	4.4%	0
Book value to price	(15.31)	0.58	0
Sales to price	0.07	1.16	0
Composite equity issuance, five years	not computable	(17.0%)	
Relative strength against the sector, log excess return	(3.70)	(0.09)	2
Twelve-month failure probability, CHS model	not computable	0.04%	

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	pass
Current ratio improved	fail
No new shares issued	fail
Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$242,702
Operating cash flow, four quarters	-$5.5M
Months of runway	0.5
Days since last periodic filing	92 (10-Q received Aug 19, 2026)
Median daily dollar volume, 63 sessions	$79,974

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	$16,898	2025-12-31	2026-04-15	10-K	26-000577
2	assets	us-gaap:Assets	$965,694	2025-12-31	2026-04-15	10-K	26-000577
3	net income	us-gaap:NetIncomeLoss	-$25.2M	2025-12-31	2026-04-15	10-K	26-000577
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$4.8M	2025-12-31	2026-04-15	10-K	26-000577
5	assets	us-gaap:Assets	$2.8M	2024-12-31	2026-04-15	10-K	26-000577
6	revenue	us-gaap:Revenues	$73,066	2025-12-31	2026-04-15	10-K	26-000577
7	current assets	us-gaap:AssetsCurrent	$631,993	2025-12-31	2026-04-15	10-K	26-000577
8	current liabilities	us-gaap:LiabilitiesCurrent	$16.3M	2025-12-31	2026-04-15	10-K	26-000577
9	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$181.9M	2025-12-31	2026-04-15	10-K	26-000577
10	operating income	us-gaap:OperatingIncomeLoss	-$14.2M	2025-12-31	2026-04-15	10-K	26-000577
11	book equity	us-gaap:StockholdersEquity	-$15.3M	2025-12-31	2026-04-15	10-K	26-000577
12	liabilities	us-gaap:Liabilities	$16.3M	2025-12-31	2026-04-15	10-K	26-000577
13	total debt	us-gaap:LongTermDebt	$3,418	2025-12-31	2026-04-15	10-K	26-000577
14	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$281,435	2025-12-31	2026-04-15	10-K	26-000577
15	depreciation amortization	us-gaap:Depreciation	$148,070	2025-12-31	2026-04-15	10-K	26-000577
16	interest expense	us-gaap:InterestExpense	$2.5M	2025-12-31	2026-04-15	10-K	26-000577
17	revenue	us-gaap:Revenues	$801,273	2024-12-31	2026-04-15	10-K	26-000577

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18	revenue	us-gaap:Revenues	$18.9M	2023-12-31	2025-07-11	10-K	25-000964
19	revenue	us-gaap:Revenues	$18.1M	2022-12-31	2024-03-29	10-K	24-000539
20	assets	us-gaap:Assets	$9.9M	2023-12-31	2025-07-11	10-K	25-000964
21	assets	us-gaap:Assets	$17.3M	2022-12-31	2024-03-29	10-K	24-000539
22	shares outstanding	dei:EntityCommonStockSharesOutstanding	10,858,508	2026-04-22	2026-04-30	10-K/A	26-000640
23	shares outstanding	dei:EntityCommonStockSharesOutstanding	9,953,538	2026-04-14	2026-04-15	10-K	26-000577

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