Tomi Environmental Solutions, Inc.

TOMZ

Nasdaq; chemicals; SIC 2860, Industrial Organic Chemicals; CIK 0000314227

E

weakest fifth of 319 graded peers in the pooled industrial gro...

rank 295 of 319; percentile 92.8; sampling error 2.7 points; lower is stronger

A B C D E

E, the bear



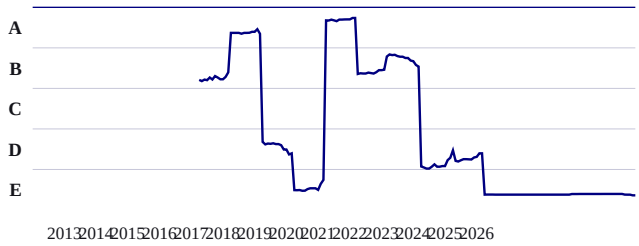
Scoreboard	
Profitability	B percentile 32.1
Solvency	E percentile 88.3
Growth and financing	E percentile 91.4
Reliability	0.76 AUC filers with under $12.5M assets; 95% interval 0.65 to 0.86; 63 events, 2020 to 2025
Peer failure rate	0.60% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	under $12.5M assets total assets $7.0M
Standard universe	outside revenue above $1M and assets above $10M
Warnings	short runway, late filer not computable: distress
Inputs computable	8 of 13
Graded from	filings received through Mar 31, 2026 235 days before the rescan; latest periodic filing 10-Q received Nov 17, 2026
Last close	$2.19 2026-11-20; market equity $21.9M; 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 Mar 31, 2026

TOMI Environmental Solutions, Inc. ("TOMI," "we," "our," or the "Company") is a global provider of disinfection and decontamination solutions, offering environmentally friendly products and services for indoor air and surface treatment. Our flagship product line, SteraMist uses our patented Binary Ionization Technology ("BIT") to deliver a low-concentration (7.8%) hydrogen peroxide-based fog or mist that effectively treats all indoor environments and surface areas.

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 32.1						
Gross profitability	43.7%	21.7%		8.9	348	2025-12-31
Return on invested capital	not computable	9.6%				
latest aligned inputs end 2019-12-31; latest annual assets end 2025-12-31						
Accruals ratio	(30.5%)	(4.3%)		4.3	373	2025-12-31

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Gross margin stability, five years	5.3 pts	2.2 pts	83.2	292	2025-12-31
Solvency, sleeve percentile 88.3					
Altman Z double-prime	(29.53)	3.50	96.7	275	2025-12-31
Net debt to EBITDA	not computable	1.83x			
EBITDA must exceed $100,000					
Interest coverage	not computable	4.55x			
interest expense must exceed $100,000					
Current ratio	1.32x	2.21x	79.8	392	2025-12-31
Growth and financing, sleeve percentile 91.4					
Revenue growth, three-year compound	(12.2%)	1.4%	92.6	340	2025-12-31
Free cash flow growth, three-year compound	not computable	12.5%			
four consecutive annual FCF observations are required; found 10					
Reinvestment rate	not computable	21.8%			
NOPAT must exceed $100,000					
Asset growth, three years	(23.2%)	2.9%	97.4	349	2025-12-31
Net share issuance, one year	2.6%	(0.04%)	84.1	315	2026-03-20

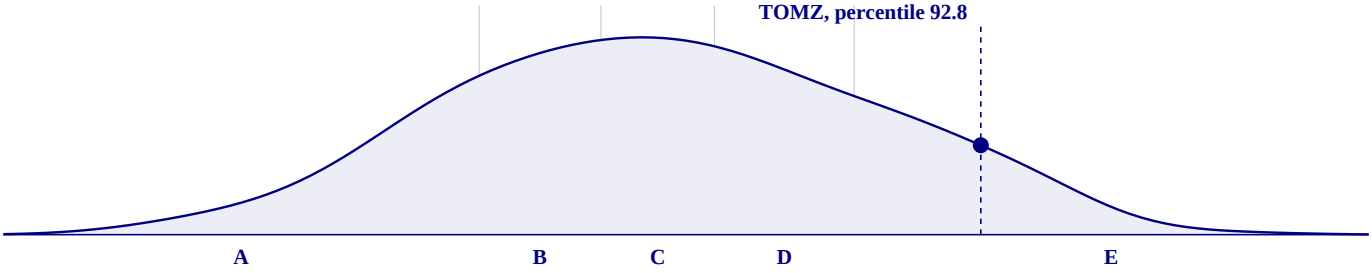
Warnings

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

Check	Measured
Short runway	cash runway is 1.1 months
Late filer	found 2 NT 10-K/Q filings in the last eight quarters

Among 319 peers

chemicals; 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
290	DOW Inc. (DOW)	91.5	E	
291	Tronox Holdings plc (TROX)	91.8	E	
292	DSS, Inc. (DSS)	91.8	E	distress
293	Boeing Co. (BA)	92.2	E	
294	Techprecision Corp. (TPCS)	92.7	E	late filer, fortress balance sheet
295	Tomi Environmental Solutions, Inc. (TOMZ)	92.8	E	short runway, late filer
296	Graftech International Ltd. (EAF)	93.1	E	
297	Rayonier Advanced Materials Inc. (RYAM)	93.5	E	
298	Malibu Boats, Inc. (MBUU)	93.9	E	
299	International Flavors & Fragrances Inc. (IFF)	94.0	E	
300	GoPro, Inc. (GPRO)	94.3	E	late filer, fortress balance sheet

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What the price implies

at the 2026-11-20 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(54.5%)	11.1%	4
Distance from 52-week high	(34.0%)	(30.7%)	43
EBIT to enterprise value	(17.6%)	4.0%	8
Free cash flow yield	(5.6%)	3.7%	16
Book value to price	0.19	0.43	18
Sales to price	0.26	0.61	18
Composite equity issuance, five years	58.1%	(10.3%)	92
Relative strength against the sector, log excess return	(0.93)	(0.00)	4
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	fail
Current ratio improved	fail
No new shares issued	fail
Gross margin improved	pass
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$195,000
Operating cash flow, four quarters	-$2.2M
Months of runway	1.1
Days since last periodic filing	4 (10-Q received Nov 17, 2026)
Median daily dollar volume, 63 sessions	$39,279

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	$3.1M	2025-12-31	2026-03-31	10-K	26-003091
2	assets	us-gaap:Assets	$7.0M	2025-12-31	2026-03-31	10-K	26-003091
3	operating income	us-gaap:OperatingIncomeLoss	-$2.1M	2019-12-31	2021-03-30	10-K	21-003525
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$2.3M	2019-12-31	2021-03-30	10-K	21-003525
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$0	2019-12-31	2021-03-30	10-K	21-003525
6	total debt	us-gaap:LongTermDebt	$5.0M	2019-12-31	2020-03-30	10-K	20-003413
7	book equity	us-gaap:StockholdersEquity	$889,543	2019-12-31	2022-03-29	10-K	22-004048
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$897,223	2019-12-31	2022-03-29	10-K	22-004048
9	total debt	us-gaap:LongTermDebt	$5.0M	2018-12-31	2020-03-30	10-K	20-003413
10	book equity	us-gaap:StockholdersEquity	$3.0M	2018-12-31	2021-03-30	10-K	21-003525
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$2.0M	2018-12-31	2021-03-30	10-K	21-003525
12	net income	us-gaap:NetIncomeLoss	-$3.7M	2025-12-31	2026-03-31	10-K	26-003091
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$1.2M	2025-12-31	2026-03-31	10-K	26-003091
14	assets	us-gaap:Assets	$9.7M	2024-12-31	2026-03-31	10-K	26-003091
15	revenue	us-gaap:Revenues	$5.6M	2025-12-31	2026-03-31	10-K	26-003091
16	gross profit	us-gaap:GrossProfit	$3.6M	2024-12-31	2026-03-31	10-K	26-003091
17	revenue	us-gaap:Revenues	$7.7M	2024-12-31	2026-03-31	10-K	26-003091

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18	gross profit	us-gaap:GrossProfit	$4.3M	2023-12-31	2025-04-14	10-K	25-004233
19	revenue	us-gaap:Revenues	$7.4M	2023-12-31	2025-04-14	10-K	25-004233
20	gross profit	us-gaap:GrossProfit	$5.1M	2022-12-31	2024-04-01	10-K	24-004045
21	revenue	us-gaap:Revenues	$8.3M	2022-12-31	2024-04-01	10-K	24-004045
22	gross profit	us-gaap:GrossProfit	$4.6M	2021-12-31	2023-03-16	10-K	23-003029
23	revenue	us-gaap:Revenues	$7.8M	2021-12-31	2023-03-16	10-K	23-003029
24	current assets	us-gaap:AssetsCurrent	$4.2M	2025-12-31	2026-03-31	10-K	26-003091
25	current liabilities	us-gaap:LiabilitiesCurrent	$3.2M	2025-12-31	2026-03-31	10-K	26-003091
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$58.1M	2025-12-31	2026-03-31	10-K	26-003091
27	operating income	us-gaap:OperatingIncomeLoss	-$3.9M	2025-12-31	2026-03-31	10-K	26-003091
28	book equity	us-gaap:StockholdersEquity	$588,504	2025-12-31	2026-03-31	10-K	26-003091
29	liabilities	us-gaap:Liabilities	$6.4M	2025-12-31	2026-03-31	10-K	26-003091
30	depreciation amortization	us-gaap:Depreciation	$345,687	2019-12-31	2021-03-30	10-K	21-003525
31	operating income	us-gaap:OperatingIncomeLoss	-$3.3M	2023-12-31	2025-04-14	10-K	25-004233
32	interest expense	us-gaap:InterestExpense	$63,305	2023-12-31	2024-04-01	10-K	24-004045
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$5,165	2025-12-31	2026-03-31	10-K	26-003091
34	depreciation amortization	us-gaap:Depreciation	$241,506	2025-12-31	2026-03-31	10-K	26-003091
35	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$3.7M	2025-12-31	2026-03-31	10-K	26-003091
36	income tax	us-gaap:IncomeTaxExpenseBenefit	$0	2025-12-31	2026-03-31	10-K	26-003091
37	current assets	us-gaap:AssetsCurrent	$6.5M	2024-12-31	2026-03-31	10-K	26-003091
38	current liabilities	us-gaap:LiabilitiesCurrent	$2.7M	2024-12-31	2026-03-31	10-K	26-003091
39	assets	us-gaap:Assets	$13.4M	2023-12-31	2025-04-14	10-K	25-004233
40	assets	us-gaap:Assets	$15.5M	2022-12-31	2024-04-01	10-K	24-004045
41	shares outstanding	dei:EntityCommonStockSharesOutstanding	20,540,539	2026-03-20	2026-03-31	10-K	26-003091
42	shares outstanding	dei:EntityCommonStockSharesOutstanding	20,015,205	2025-04-30	2025-05-01	10-K/A	25-004993

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