Agios Pharmaceuticals, Inc.

AGIO

Nasdaq; healthcare; SIC 2834, Pharmaceutical Preparations; CIK 0001439222

B

second fifth of 305 graded peers in healthcare

rank 82 of 305; percentile 26.6; sampling error 2.8 points; lower is stronger

A B C D E

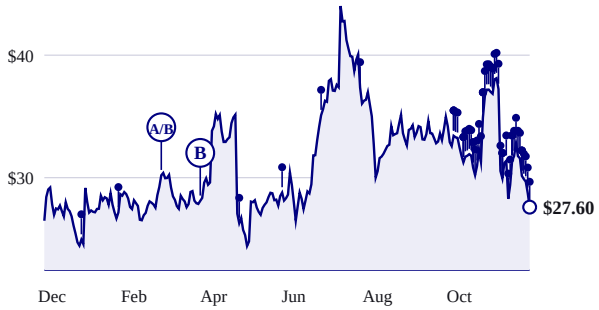
B, the elk



Scoreboard

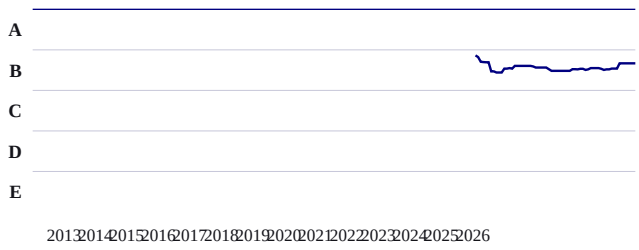
Profitability	D/E percentile 80.1
Solvency	A percentile 10.6
Growth and financing	B percentile 31.0
Reliability	0.91 AUC filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025
Peer failure rate	1.01% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$591M to $2.67B assets total assets $1.3B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	short runway not computable: fortress balance sheet
Inputs computable	7 of 13
Graded from	filings received through Feb 12, 2026 284 days before the rescan; latest periodic filing 10-Q received Nov 5, 2026
Last close	$27.57 2026-11-20; market equity $1.6B; 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 Feb 12, 2026

. As of December 31, 2025, we had an accumulated deficit of $561.7 million. ?We currently rely and expect to continue to rely on third parties for the manufacture of our product candidates for preclinical and clinical testing and for commercial supply of PYRUKYND® and AQVESME? and any product candidate for which we may obtain marketing approval. Any performance failure on the part of our existing or future third-party manufacturers could delay clinical development, marketing approval or our commercialization efforts.

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 80.1						
Gross profitability	3.7%	32.8%		87.2	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	(2.7%)	(6.7%)		73.0	756	2025-12-31
Gross margin stability, five years	not computable	2.8 pts				
five consecutive annual gross margins are required						
Solvency, sleeve percentile 10.6						
Altman Z double-prime	12.52	0.31		7.4	705	2025-12-31
Net debt to EBITDA	not computable	1.82x				
one or more required annual facts are missing						
Interest coverage	not computable	(3.61x)				
one or more required annual facts are missing						
Current ratio	11.46x	2.68x		13.7	781	2025-12-31
Growth and financing, sleeve percentile 31.0						
Revenue growth, three-year compound	56.0%	9.6%		11.3	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%				
NOPAT must exceed $100,000						
Asset growth, three years	1.6%	3.2%		48.6	663	2025-12-31
Net share issuance, one year	2.3%	1.6%		33.1	626	2026-02-06

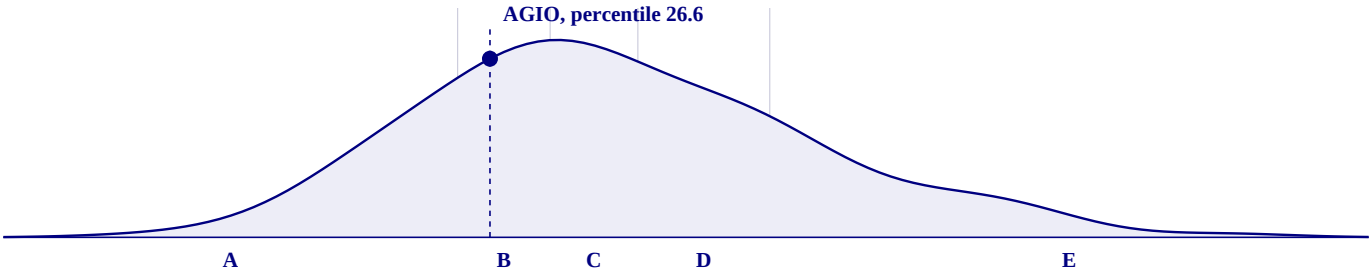
Warnings

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

Check	Measured
Short runway	cash runway is 4.7 months

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
77	Axogen, Inc. (AXGN)	25.0	B	
78	NeuroPace Inc. (NPCE)	25.3	B	
79	GE HealthCare Technologies Inc. (GEHC)	25.7	B	
80	Phibro Animal Health Corp. (PAHC)	26.0	B	
81	Mannatech Inc. (MTEX)	26.3	B	late filer, fortress balance sheet
82	Agios Pharmaceuticals, Inc. (AGIO)	26.6	B	short runway
83	Sensus Healthcare, Inc. (SRTS)	27.0	B	
84	Alphatec Holdings, Inc. (ATEC)	27.3	B	
85	Travere Therapeutics, Inc. (TVTX)	27.6	B	
86	Tela Bio, Inc. (TELA)	28.0	B	fortress balance sheet
87	Cytokinetics Inc. (CYTK)	28.3	B	short runway

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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	(23.1%)	(1.7%)	35
Distance from 52-week high	(37.3%)	(33.0%)	46
EBIT to enterprise value	not computable	0.5%	
Free cash flow yield	(22.9%)	0.6%	20
Book value to price	0.59	0.29	71
Sales to price	0.03	0.38	6
Composite equity issuance, five years	(15.2%)	13.5%	14
Relative strength against the sector, log excess return	(0.43)	(0.19)	35
Twelve-month failure probability, CHS model	0.03%	0.06%	30

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	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$128.5M
Operating cash flow, four quarters	-$331.7M
Months of runway	4.7
Days since last periodic filing	18 (10-Q received Nov 5, 2026)
Median daily dollar volume, 63 sessions	$31.6M

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	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$54.0M	2025-12-31	2026-02-12	10-K	26-000025
2	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$6.3M	2025-12-31	2026-02-12	10-K	26-000025
3	assets	us-gaap:Assets	$1.3B	2025-12-31	2026-02-12	10-K	26-000025
4	net income	us-gaap:NetIncomeLoss	-$412.8M	2025-12-31	2026-02-12	10-K	26-000025
5	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$373.0M	2025-12-31	2026-02-12	10-K	26-000025
6	assets	us-gaap:Assets	$1.7B	2024-12-31	2026-02-12	10-K	26-000025
7	current assets	us-gaap:AssetsCurrent	$942.1M	2025-12-31	2026-02-12	10-K	26-000025
8	current liabilities	us-gaap:LiabilitiesCurrent	$82.2M	2025-12-31	2026-02-12	10-K	26-000025
9	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$561.7M	2025-12-31	2026-02-12	10-K	26-000025
10	operating income	us-gaap:OperatingIncomeLoss	-$472.1M	2025-12-31	2026-02-12	10-K	26-000025
11	book equity	us-gaap:StockholdersEquity	$1.2B	2025-12-31	2026-02-12	10-K	26-000025
12	liabilities	us-gaap:Liabilities	$104.1M	2025-12-31	2026-02-12	10-K	26-000025
13	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$36.5M	2024-12-31	2026-02-12	10-K	26-000025
14	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$26.8M	2023-12-31	2026-02-12	10-K	26-000025
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$14.2M	2022-12-31	2025-02-13	10-K	25-000009
16	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$4.3M	2025-12-31	2026-02-12	10-K	26-000025
17	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$389.8M	2024-12-31	2026-02-12	10-K	26-000025

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18	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$1.7M	2024-12-31	2026-02-12	10-K	26-000025
19	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$296.1M	2023-12-31	2026-02-12	10-K	26-000025
20	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$999,000	2023-12-31	2026-02-12	10-K	26-000025
21	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$309.5M	2022-12-31	2025-02-13	10-K	25-000009
22	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$4.9M	2022-12-31	2025-02-13	10-K	25-000009
23	depreciation amortization	us-gaap:Depreciation	$5.2M	2025-12-31	2026-02-12	10-K	26-000025
24	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$413.8M	2025-12-31	2026-02-12	10-K	26-000025
25	income tax	us-gaap:IncomeTaxExpenseBenefit	-$1.0M	2025-12-31	2026-02-12	10-K	26-000025
26	current assets	us-gaap:AssetsCurrent	$965.6M	2024-12-31	2026-02-12	10-K	26-000025
27	current liabilities	us-gaap:LiabilitiesCurrent	$81.2M	2024-12-31	2026-02-12	10-K	26-000025
28	assets	us-gaap:Assets	$937.1M	2023-12-31	2025-02-13	10-K	25-000009
29	assets	us-gaap:Assets	$1.2B	2022-12-31	2024-02-15	10-K	24-000035
30	shares outstanding	dei:EntityCommonStockSharesOutstanding	58,592,172	2026-02-06	2026-02-12	10-K	26-000025
31	shares outstanding	dei:EntityCommonStockSharesOutstanding	57,296,167	2025-02-07	2025-02-13	10-K	25-000009

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