

Onterris, Inc. (ONT)

NYSE; other; SIC 8742, Services-Management Consulting Services; CIK 0001643615

Onterris, Inc. ONT; other	
Grade	C A B C D E middle fifth of 336 graded peers percentile 45.4; sampling error 2.6 points; lower is stronger
Rank	153 of 336
Profitability	B/C percentile 40.8
Solvency	D percentile 64.1
Growth and financing	B percentile 34.9
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 \$981.3M
Standard universe	inside revenue above \$1M and assets above \$10M
Warnings	none active not computable: distress
Inputs computable	10 of 14
Graded from	filings received through Feb 26, 2026 225 days before the rescen; latest periodic filing 10-Q received Aug 6, 2026
Last close	\$13.67 2026-10-08; market equity \$480.1M
Price used in grade	None



C, the tortoise
middle fifth of its sector; letters are fifths of the 336 graded peers

Share price, twelve months to the rescen
split-adjusted close; the letter is fixed at the rescen that set it



Rescens on file: B from Mar 21, 2024, D from Mar 21, 2025, C from Mar 21, 2026

Letter at every rescans

Jan 21, 2012 to Oct 9, 2026; sector percentile, 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 26, 2026

Since our inception in 2012, our mission has been to help clients and communities meet their environmental goals and needs. We service complex and often non-discretionary environmental needs of our diverse clients across our three business segments: Assessment, Permitting and Response; Measurement and Analysis; and Remediation and Reuse. Examples of our services include: Our industry is highly fragmented with no single market leader. By focusing solely on environmental solutions, we believe we are

uniquely positioned to become a leading platform in the environmental industry.

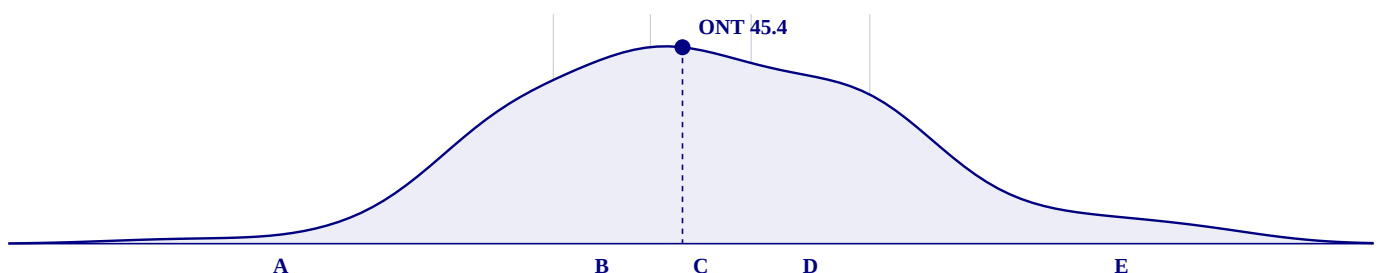
The fourteen inputs

lower percentile is stronger; equal-weighted sleeves

Input	Percentile, 0 to 100	Value	Peer median	Percentile	Peers	Period end
Profitability, sleeve percentile 40.8						
Gross profitability		34.1%	27.1%	36.1	289	2025-12-31
Return on invested capital		not computable	10.0%			pretax income must exceed the validity floor and imply a 0%-100% tax rate
Accruals ratio		(11.0%)	(5.9%)	23.2	506	2025-12-31
Gross margin stability, five years		3.0 pts	2.2 pts	63.1	204	2025-12-31
Solvency, sleeve percentile 64.1						
Twelve-month failure probability		not computable	0.04%			latest liabilities, cash plus short-term investments, book equity, and shares are required
Altman Z double-prime		0.55	2.05	55.8	386	2025-12-31
Net debt to EBITDA		11.07x	2.52x	92.3	184	2025-12-31
Interest coverage		not computable	2.18x			one or more required annual facts are missing
Current ratio		1.43x	1.32x	44.2	506	2025-12-31
Growth and financing, sleeve percentile 34.9						
Revenue growth, three-year compound		15.1%	5.1%	19.7	403	2025-12-31
Free cash flow growth, three-year compound		102.0%	8.7%	4.6	220	2025-12-31
Reinvestment rate		not computable	11.9%			pretax income must exceed the validity floor and imply a 0%-100% tax rate
Asset growth, three years		7.4%	4.1%	35.5	438	2025-12-31
Net share issuance, one year		4.8%	(0.4%)	79.7	356	2026-02-20

Among 336 peers

other; 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
148	Werner Enterprises Inc. (WERN)	43.9	C	
149	TSS, Inc. (TSSI)	44.2	C	late filer, fortress balance sheet
150	Aecom (ACM)	44.5	C	
151	Uber Technologies, Inc. (UBER)	44.8	C	
152	EVgo Inc. (EVGO)	45.1	C	
153	Onterris, Inc. (ONT) <	45.4	C	
154	Everforth Inc. (EFOR)	45.7	C	
155	Fortune Brands Innovations, Inc. (FBIN)	46.0	C	
156	United Parks & Resorts Inc. (PRKS)	46.3	C	late filer
157	Freeport-Mcmoran Inc. (FCX)	46.6	C	
158	Ebay Inc. (EBAY)	46.9	C	

What the price implies

at the 2026-10-08 close; none enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(39.1%)	2.0%	15
Distance from 52-week high	(54.2%)	(26.8%)	17
EBIT to enterprise value	1.5%	4.4%	23
Free cash flow yield	18.9%	4.1%	93
Book value to price	0.89	0.34	84
Sales to price	1.73	0.70	76
Composite equity issuance, five years	33.2%	(8.8%)	89
Relative strength against the sector, log excess return	(0.64)	(0.13)	15

Diagnostics

not in the grade

Measure	Value
Piotroski F-score 4 of 9, period end 2025-12-31	
Return on assets above zero	fail
Operating cash flow above zero	pass
Return on assets improved	pass
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	fail
Cash, filings, liquidity	
Cash and equivalents	\$12.7M
Operating cash flow, four quarters	\$74.6M
Months of runway	not finite
Days since last periodic filing	64 (10-Q received Aug 6, 2026)
Median daily dollar volume, 63 sessions	\$9.8M

Sources

each row links to the filing index on sec.gov

#	Concept	XBRL tag	Value	Period end	Received	Form	Accession
1	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$830.5M	2025-12-31	2026-02-26	10-K	0001193125-26-076511
2	cost of revenue	us-gaap:CostOfRevenue	\$496.2M	2025-12-31	2026-02-26	10-K	0001193125-26-076511
3	assets	us-gaap:Assets	\$981.3M	2025-12-31	2026-02-26	10-K	0001193125-26-076511
4	operating income	us-gaap:OperatingIncomeLoss	\$11.7M	2025-12-31	2026-02-26	10-K	0001193125-26-076511
5	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraord	\$11.2M	2025-12-31	2026-02-26	10-K	0001193125-26-076511
6	income tax	us-gaap:IncomeTaxExpenseBenefit	\$12.1M	2025-12-31	2026-02-26	10-K	0001193125-26-076511

7	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	\$277.1M	2025-12-31	2026-02-26	10-K	0001193125-26-076511
8	book equity	us-gaap:StockholdersEquity	\$451.2M	2025-12-31	2026-02-26	10-K	0001193125-26-076511
9	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$11.2M	2025-12-31	2026-02-26	10-K	0001193125-26-076511
10	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	\$204.8M	2024-12-31	2026-02-26	10-K	0001193125-26-076511
11	book equity	us-gaap:StockholdersEquity	\$446.3M	2024-12-31	2026-02-26	10-K	0001193125-26-076511
12	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$12.9M	2024-12-31	2026-02-26	10-K	0001193125-26-076511
13	net income	us-gaap:NetIncomeLoss	-\$843,000	2025-12-31	2026-02-26	10-K	0001193125-26-076511
14	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$107.5M	2025-12-31	2026-02-26	10-K	0001193125-26-076511
15	assets	us-gaap:Assets	\$990.4M	2024-12-31	2026-02-26	10-K	0001193125-26-076511
16	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$696.4M	2024-12-31	2026-02-26	10-K	0001193125-26-076511
17	cost of revenue	us-gaap:CostOfRevenue	\$418.2M	2024-12-31	2026-02-26	10-K	0001193125-26-076511
18	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$624.2M	2023-12-31	2026-02-26	10-K	0001193125-26-076511
19	cost of revenue	us-gaap:CostOfRevenue	\$383.9M	2023-12-31	2026-02-26	10-K	0001193125-26-076511
20	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$544.4M	2022-12-31	2025-03-03	10-K	0000950170-25-030806
21	cost of revenue	us-gaap:CostOfRevenue	\$351.9M	2022-12-31	2025-03-03	10-K	0000950170-25-030806
22	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$546.4M	2021-12-31	2024-02-29	10-K	0000950170-24-023043
23	cost of revenue	us-gaap:CostOfRevenue	\$369.0M	2021-12-31	2024-02-29	10-K	0000950170-24-023043
24	current assets	us-gaap:AssetsCurrent	\$240.4M	2025-12-31	2026-02-26	10-K	0001193125-26-076511
25	current liabilities	us-gaap:LiabilitiesCurrent	\$168.0M	2025-12-31	2026-02-26	10-K	0001193125-26-076511
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-\$273.5M	2025-12-31	2026-02-26	10-K	0001193125-26-076511
27	liabilities	us-gaap:Liabilities	\$530.1M	2025-12-31	2026-02-26	10-K	0001193125-26-076511
28	depreciation amortization	us-gaap:Depreciation	\$12.3M	2025-12-31	2026-02-26	10-K	0001193125-26-076511
29	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$16.3M	2025-12-31	2026-02-26	10-K	0001193125-26-076511
30	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$22.2M	2024-12-31	2026-02-26	10-K	0001193125-26-076511
31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$21.3M	2024-12-31	2026-02-26	10-K	0001193125-26-076511
32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$56.0M	2023-12-31	2026-02-26	10-K	0001193125-26-076511
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$29.6M	2023-12-31	2026-02-26	10-K	0001193125-26-076511
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$20.6M	2022-12-31	2025-03-03	10-K	0000950170-25-030806
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$9.6M	2022-12-31	2025-03-03	10-K	0000950170-25-030806
36	current assets	us-gaap:AssetsCurrent	\$238.0M	2024-12-31	2026-02-26	10-K	0001193125-26-076511
37	current liabilities	us-gaap:LiabilitiesCurrent	\$158.7M	2024-12-31	2026-02-26	10-K	0001193125-26-076511
38	assets	us-gaap:Assets	\$816.8M	2023-12-31	2025-03-03	10-K	0000950170-25-030806
39	assets	us-gaap:Assets	\$791.9M	2022-12-31	2024-02-29	10-K	0000950170-24-023043
40	shares outstanding	dei:EntityCommonStockSharesOutstanding	35,980,650	2026-02-20	2026-02-26	10-K	0001193125-26-076511
41	shares outstanding	dei:EntityCommonStockSharesOutstanding	34,339,764	2025-02-21	2025-03-03	10-K	0000950170-25-030806