Robert Half Inc.

RHI

NYSE; other; SIC 7363, Services-Help Supply Services; CIK 0000315213

C

middle fifth of 334 graded peers in other

rank 177 of 334; percentile 52.9; sampling error 2.7 points; lower is stronger

A B C D E

C, the tortoise



Scoreboard	
Profitability	B percentile 31.8
Solvency	B/C percentile 37.5
Growth and financing	D percentile 75.8
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $2.9B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered; fortress balance sheet not computable: distress
Inputs computable	10 of 14
Graded from	filings received through Feb 13, 2026 249 days before the rescan; latest periodic filing 10-Q received Aug 4, 2026
Last close	$32.86 2026-10-19; market equity $3.4B; 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 13, 2026

Robert Half Inc. (the "Company") provides specialized talent solutions and business consulting services through the Robert Half® and Protiviti® company names. The Company's business was originally founded in 1948. Prior to 1986, the Company was primarily a franchisor, under the names Accountemps and Robert Half, with offices providing contract and permanent professionals in the fields of accounting and finance. Beginning in 1986, the Company embarked on a strategy of acquiring the franchised locations. All franchises have since been acquired.

The fourteen 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 31.8						
Gross profitability	70.1%	27.1%		5.6	287	2025-12-31
Return on invested capital	not computable	10.0%				

latest aligned inputs end 2019-12-31; latest annual assets end 2025-12-31

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Accruals ratio	(6.5%)	(5.8%)		44.7	502	2025-12-31
Gross margin stability, five years	2.0 pts	2.2 pts		45.1	205	2025-12-31
Solvency, sleeve percentile 37.5						
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	2.71	2.05		33.9	384	2025-12-31
Net debt to EBITDA	not computable	2.52x				
latest aligned inputs end 2019-12-31; latest annual assets end 2025-12-31						
Interest coverage	not computable	2.18x				
one or more required annual facts are missing						
Current ratio	1.53x	1.33x		41.0	503	2025-12-31
Growth and financing, sleeve percentile 75.8						
Revenue growth, three-year compound	(9.4%)	5.1%		88.2	400	2025-12-31
Free cash flow growth, three-year compound	(24.6%)	8.9%		84.9	219	2025-12-31
Reinvestment rate	(202.7%)	11.9%		93.7	190	2025-12-31
Asset growth, three years	(1.2%)	4.1%		71.8	434	2025-12-31
Net share issuance, one year	(1.0%)	(0.5%)		40.2	354	2026-01-31

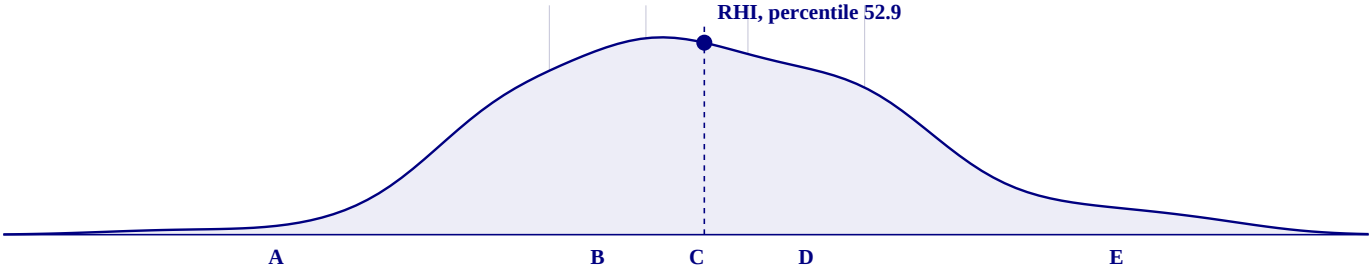
Warnings

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

Check	Measured
Fortress balance sheet	cash minus debt is 270,021,000 USD; Altman Z is not used

Among 334 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
172	Louisiana-Pacific Corp. (LPX)	51.4	C	
173	MGM Resorts International (MGM)	51.7	C	
174	Matson, Inc. (MATX)	52.0	C	
175	Reservoir Media, Inc. (RSVR)	52.3	C	
176	Wynn Resorts Ltd. (WYNN)	52.6	C	
177	Robert Half Inc. (RHI)	52.9	C	fortress balance sheet
178	Rimini Street, Inc. (RMNI)	53.2	C	fortress balance sheet
179	Choice Hotels International Inc. (CHH)	53.5	C	
180	Union Pacific Corp. (UNP)	53.8	C	
181	Lyft, Inc. (LYFT)	54.1	C	fortress balance sheet
182	Arlo Technologies, Inc. (ARLO)	54.4	C	

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What the price implies

at the 2026-10-19 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	43.0%	2.0%	79
Distance from 52-week high	(27.5%)	(26.1%)	48
EBIT to enterprise value	2.5%	4.4%	27
Free cash flow yield	7.9%	4.1%	76
Book value to price	0.36	0.35	52
Sales to price	1.60	0.72	74
Composite equity issuance, five years	(29.9%)	(8.8%)	15
Relative strength against the sector, log excess return	0.21	(0.13)	79

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	pass
Operating cash flow above zero	pass
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	pass
Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$324.7M
Operating cash flow, four quarters	$256.3M
Months of runway	not finite
Days since last periodic filing	77 (10-Q received Aug 4, 2026)
Median daily dollar volume, 63 sessions	$76.3M

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	$2.0B	2025-12-31	2026-02-13	10-K	26-000006
2	assets	us-gaap:Assets	$2.9B	2025-12-31	2026-02-13	10-K	26-000006
3	operating income	us-gaap:OperatingIncomeLoss	$621.8M	2019-12-31	2022-02-14	10-K	22-000018
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$625.5M	2019-12-31	2021-02-12	10-K	21-000025
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$171.1M	2019-12-31	2022-02-14	10-K	22-000018
6	total debt	us-gaap:LongTermDebt	$457,000	2019-12-31	2020-02-14	10-K	20-000029
7	book equity	us-gaap:StockholdersEquity	$1.1B	2019-12-31	2023-02-10	10-K	23-000016
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$270.5M	2019-12-31	2021-02-12	10-K	21-000025
9	total debt	us-gaap:LongTermDebt	$657,000	2018-12-31	2019-02-15	10-K	19-001488
10	book equity	us-gaap:StockholdersEquity	$1.1B	2018-12-31	2022-02-14	10-K	22-000018
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$276.6M	2018-12-31	2020-02-14	10-K	20-000029
12	net income	us-gaap:NetIncomeLoss	$133.0M	2025-12-31	2026-02-13	10-K	26-000006
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$320.0M	2025-12-31	2026-02-13	10-K	26-000006
14	assets	us-gaap:Assets	$2.9B	2024-12-31	2026-02-13	10-K	26-000006
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$5.4B	2025-12-31	2026-02-13	10-K	26-000006
16	gross profit	us-gaap:GrossProfit	$2.2B	2024-12-31	2026-02-13	10-K	26-000006
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$5.8B	2024-12-31	2026-02-13	10-K	26-000006
18	gross profit	us-gaap:GrossProfit	$2.6B	2023-12-31	2026-02-13	10-K	26-000006

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19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$6.4B	2023-12-31	2026-02-13	10-K	26-000006
20	gross profit	us-gaap:GrossProfit	$3.1B	2022-12-31	2025-02-13	10-K	25-000007
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$7.2B	2022-12-31	2025-02-13	10-K	25-000007
22	gross profit	us-gaap:GrossProfit	$2.7B	2021-12-31	2024-02-20	10-K	24-000011
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$6.5B	2021-12-31	2024-02-20	10-K	24-000011
24	current assets	us-gaap:AssetsCurrent	$2.1B	2025-12-31	2026-02-13	10-K	26-000006
25	current liabilities	us-gaap:LiabilitiesCurrent	$1.4B	2025-12-31	2026-02-13	10-K	26-000006
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$0	2025-12-31	2026-02-13	10-K	26-000006
27	operating income	us-gaap:OperatingIncomeLoss	$76.5M	2025-12-31	2026-02-13	10-K	26-000006
28	book equity	us-gaap:StockholdersEquity	$1.3B	2025-12-31	2026-02-13	10-K	26-000006
29	liabilities	us-gaap:Liabilities	$1.6B	2025-12-31	2026-02-13	10-K	26-000006
30	depreciation amortization	us-gaap:Depreciation	$64.3M	2019-12-31	2022-02-14	10-K	22-000018
31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$53.2M	2025-12-31	2026-02-13	10-K	26-000006
32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$410.5M	2024-12-31	2026-02-13	10-K	26-000006
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$56.3M	2024-12-31	2026-02-13	10-K	26-000006
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$636.9M	2023-12-31	2026-02-13	10-K	26-000006
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$45.9M	2023-12-31	2026-02-13	10-K	26-000006
36	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$683.8M	2022-12-31	2025-02-13	10-K	25-000007
37	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$61.1M	2022-12-31	2025-02-13	10-K	25-000007
38	depreciation amortization	us-gaap:Depreciation	$50.0M	2025-12-31	2026-02-13	10-K	26-000006
39	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$194.4M	2025-12-31	2026-02-13	10-K	26-000006
40	income tax	us-gaap:IncomeTaxExpenseBenefit	$61.4M	2025-12-31	2026-02-13	10-K	26-000006
41	current assets	us-gaap:AssetsCurrent	$2.1B	2024-12-31	2026-02-13	10-K	26-000006
42	current liabilities	us-gaap:LiabilitiesCurrent	$1.3B	2024-12-31	2026-02-13	10-K	26-000006
43	assets	us-gaap:Assets	$3.0B	2023-12-31	2025-02-13	10-K	25-000007
44	assets	us-gaap:Assets	$3.0B	2022-12-31	2024-02-20	10-K	24-000011
45	shares outstanding	dei:EntityCommonStockSharesOutstanding	101,143,596	2026-01-31	2026-02-13	10-K	26-000006
46	shares outstanding	dei:EntityCommonStockSharesOutstanding	102,199,469	2025-01-31	2025-02-13	10-K	25-000007

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