Federal Signal Corp. FSS

NYSE; consumer durables; SIC 3711, Motor Vehicles & Passenger Car Bodies; CIK 0000277509

A

strongest fifth of 460 graded peers in the pooled consumer gr...

rank 49 of 460; percentile 10.7; sampling error 2.3 points; lower is stronger

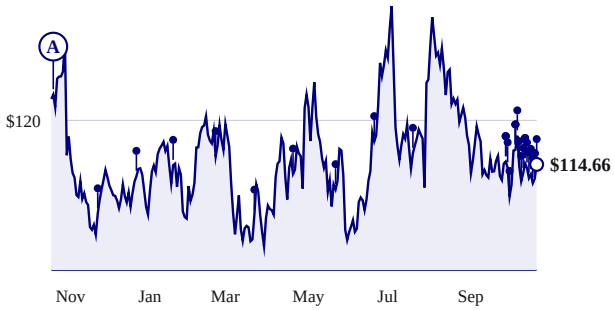
A B C D E

A, the bull



Scoreboard	
Profitability	C/D percentile 59.3
Solvency	A/B percentile 19.8
Growth and financing	A/B percentile 19.6
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 $2.4B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress
Inputs computable	13 of 14
Graded from	filings received through Feb 25, 2026 238 days before the rescan; latest periodic filing 10-Q received Jul 30, 2026
Last close	$114.69 2026-10-20; market equity $7.0B; 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 25, 2026

Federal Signal Corporation, founded in 1901, was reincorporated as a Delaware corporation in 1969. The Company designs, manufactures, and supplies a suite of products and integrated solutions for municipal, governmental, industrial, and commercial customers.

The fourteen inputs

lower percentile is stronger; sleeves and inputs within a sleeve carry equal weight

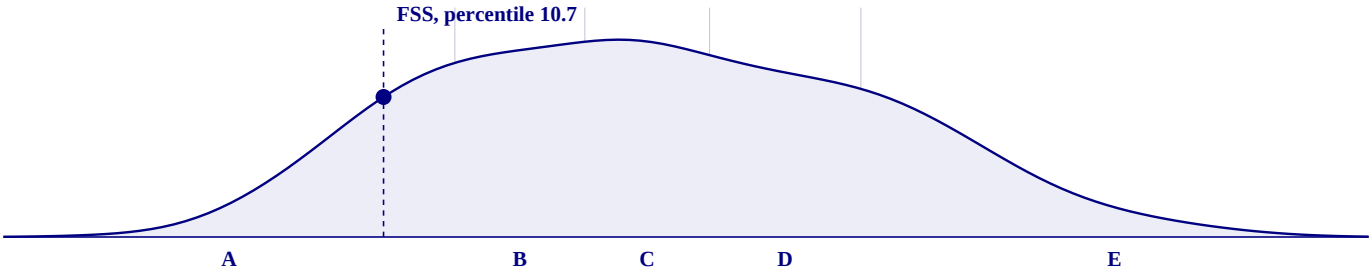
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 59.3						
Gross profitability	26.4%	34.4%		61.0	473	2025-12-31
Return on invested capital	16.3%	8.9%		27.2	163	2025-12-31
Accruals ratio	(0.4%)	(5.1%)		86.0	523	2025-12-31
Gross margin stability, five years	2.2 pts	1.7 pts		62.9	408	2025-12-31
Solvency, sleeve percentile 19.8						

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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	5.75	2.11	16.5	400	2025-12-31
Net debt to EBITDA	1.19x	2.11x	37.6	187	2025-12-31
Interest coverage	24.18x	2.57x	9.4	128	2025-12-31
Current ratio	3.02x	1.56x	15.6	539	2025-12-31
Growth and financing, sleeve percentile 19.6					
Revenue growth, three-year compound	15.0%	1.4%	7.1	482	2025-12-31
Free cash flow growth, three-year compound	129.4%	8.3%	2.8	250	2025-12-31
Reinvestment rate	45.5%	12.0%	34.1	265	2025-12-31
Asset growth, three years	16.2%	1.7%	8.4	487	2025-12-31
Net share issuance, one year	(0.3%)	(0.3%)	45.8	381	2026-01-31

Among 460 peers

consumer durables; 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
44	FirstCash Holdings, Inc. (FCFS)	9.7	A	
45	Jerash Holdings (Us), Inc. (JRSH)	9.8	A	fortress balance sheet
46	Ulta Beauty, Inc. (ULTA)	10.1	A	
47	Lovesac Co. (LOVE)	10.5	A	fortress balance sheet
48	Steven Madden, Ltd. (SHOO)	10.6	A	
49	Federal Signal Corp. (FSS)	10.7	A	
50	Eplus Inc. (PLUS)	10.9	A	fortress balance sheet
51	Dutch Bros Inc. (BROS)	11.3	A	fortress balance sheet
52	Vita Coco Company, Inc. (COCO)	11.4	A	
53	Watsco Inc. (WSO)	11.9	A	fortress balance sheet
54	Watsco Inc. (WSO-B)	11.9	A	fortress balance sheet

What the price implies

at the 2026-10-20 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(1.2%)	(0.1%)	48
Distance from 52-week high	(14.3%)	(24.0%)	67
EBIT to enterprise value	4.6%	4.9%	48
Free cash flow yield	3.2%	4.4%	39
Book value to price	0.22	0.44	32
Sales to price	0.31	1.45	9
Composite equity issuance, five years	(3.2%)	(16.0%)	70
Relative strength against the sector, log excess return	0.01	(0.01)	53

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Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 8 of 9, period end 2025-12-31	
Return on assets above zero	pass
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	pass
No new shares issued	pass
Gross margin improved	pass
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$62.8M
Operating cash flow, four quarters	$372.5M
Months of runway	not finite
Days since last periodic filing	83 (10-Q received Jul 30, 2026)
Median daily dollar volume, 63 sessions	$45.9M

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	$631.2M	2025-12-31	2026-02-25	10-K	26-011576
2	assets	us-gaap:Assets	$2.4B	2025-12-31	2026-02-25	10-K	26-011576
3	operating income	us-gaap:OperatingIncomeLoss	$340.9M	2025-12-31	2026-02-25	10-K	26-011576
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$324.5M	2025-12-31	2026-02-25	10-K	26-011576
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$77.9M	2025-12-31	2026-02-25	10-K	26-011576
6	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$564.6M	2025-12-31	2026-02-25	10-K	26-011576
7	book equity	us-gaap:StockholdersEquity	$1.4B	2025-12-31	2026-02-25	10-K	26-011576
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$63.7M	2025-12-31	2026-02-25	10-K	26-011576
9	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$204.4M	2024-12-31	2026-02-25	10-K	26-011576
10	book equity	us-gaap:StockholdersEquity	$1.2B	2024-12-31	2026-02-25	10-K	26-011576
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$91.1M	2024-12-31	2026-02-25	10-K	26-011576
12	net income	us-gaap:NetIncomeLoss	$246.6M	2025-12-31	2026-02-25	10-K	26-011576
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$254.7M	2025-12-31	2026-02-25	10-K	26-011576
14	assets	us-gaap:Assets	$1.8B	2024-12-31	2026-02-25	10-K	26-011576
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$2.2B	2025-12-31	2026-02-25	10-K	26-011576
16	gross profit	us-gaap:GrossProfit	$533.0M	2024-12-31	2026-02-25	10-K	26-011576
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.9B	2024-12-31	2026-02-25	10-K	26-011576
18	gross profit	us-gaap:GrossProfit	$450.2M	2023-12-31	2026-02-25	10-K	26-011576
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.7B	2023-12-31	2026-02-25	10-K	26-011576
20	gross profit	us-gaap:GrossProfit	$344.9M	2022-12-31	2025-02-26	10-K	25-000012
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.4B	2022-12-31	2025-02-26	10-K	25-000012
22	gross profit	us-gaap:GrossProfit	$288.7M	2021-12-31	2024-02-27	10-K	24-000005
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.2B	2021-12-31	2024-02-27	10-K	24-000005
24	current assets	us-gaap:AssetsCurrent	$853.8M	2025-12-31	2026-02-25	10-K	26-011576
25	current liabilities	us-gaap:LiabilitiesCurrent	$282.4M	2025-12-31	2026-02-25	10-K	26-011576
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$1.3B	2025-12-31	2026-02-25	10-K	26-011576
27	liabilities	us-gaap:Liabilities	$1.0B	2025-12-31	2026-02-25	10-K	26-011576
28	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$80.5M	2025-12-31	2026-02-25	10-K	26-011576
29	interest expense	us-gaap:InterestExpense	$14.1M	2025-12-31	2026-02-25	10-K	26-011576
30	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$27.6M	2025-12-31	2026-02-25	10-K	26-011576
31	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$231.3M	2024-12-31	2026-02-25	10-K	26-011576

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32	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$40.6M	2024-12-31	2026-02-25	10-K	26-011576
33	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$194.4M	2023-12-31	2026-02-25	10-K	26-011576
34	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$30.3M	2023-12-31	2026-02-25	10-K	26-011576
35	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$71.8M	2022-12-31	2025-02-26	10-K	25-000012
36	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$53.0M	2022-12-31	2025-02-26	10-K	25-000012
37	current assets	us-gaap:AssetsCurrent	$642.5M	2024-12-31	2026-02-25	10-K	26-011576
38	current liabilities	us-gaap:LiabilitiesCurrent	$241.8M	2024-12-31	2026-02-25	10-K	26-011576
39	assets	us-gaap:Assets	$1.6B	2023-12-31	2026-02-25	10-K	26-011576
40	assets	us-gaap:Assets	$1.5B	2022-12-31	2025-02-26	10-K	25-000012
41	shares outstanding	dei:EntityCommonStockSharesOutstanding	60,888,150	2026-01-31	2026-02-25	10-K	26-011576
42	shares outstanding	dei:EntityCommonStockSharesOutstanding	61,097,074	2025-01-31	2025-02-26	10-K	25-000012

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