Twin Disc Inc.

TWIN

Nasdaq; manufacturing; SIC 3560, General Industrial Machinery & Equipment; CIK 0000100378

B

second fifth of 255 graded peers in manufacturing

rank 75 of 255; percentile 29.1; sampling error 3.0 points; lower is stronger

A B C D E

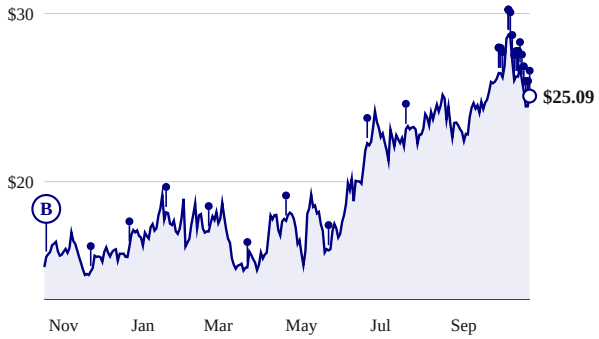
B, the elk



Scoreboard

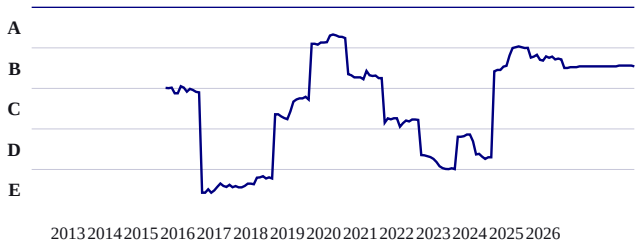
Profitability	B/C percentile 40.4
Solvency	B percentile 35.0
Growth and financing	C percentile 51.6
Reliability	0.87 AUC filers with $120M to $591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025
Peer failure rate	1.03% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$120M to $591M assets total assets $401.2M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: short runway, distress, fortress balance sheet
Inputs computable	9 of 14
Graded from	filings received through Sep 4, 2026 47 days before the rescan; latest periodic filing 10-K received Sep 4, 2026
Last close	$25.18 2026-10-20; market equity $366.1M; 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 Sep 4, 2026

Twin Disc, Incorporated ("Twin Disc" or the "Company") was incorporated under the laws of the state of Wisconsin in 1918. Twin Disc designs, manufactures and sells marine and heavy-duty off?highway power transmission equipment. The Company has manufacturing locations in the United States, Belgium, Canada, Finland, Italy, the Netherlands, and Switzerland. In addition to these countries, it has distribution locations in Belgium, Singapore, China, Australia, New Zealand, and Japan.

The fourteen inputs

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

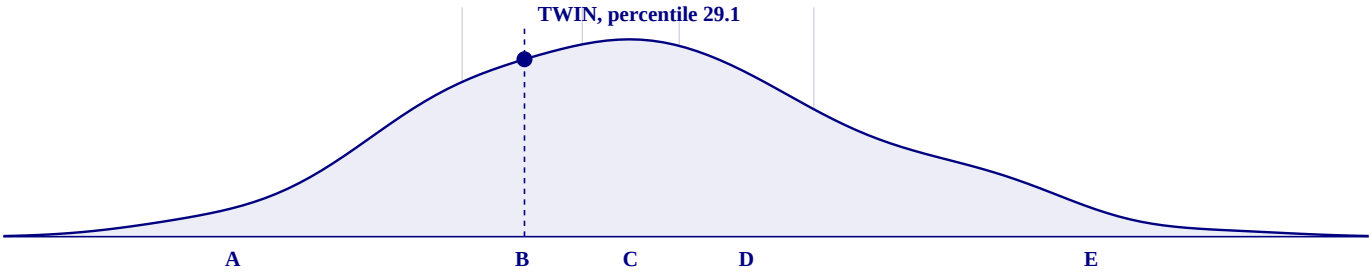
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 40.4						
Gross profitability	25.6%	21.9%		31.4	275	2026-06-30
Return on invested capital	not computable	9.7%				
one or more required annual facts are missing						
Accruals ratio	1.1%	(3.6%)		83.7	307	2026-06-30

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Gross margin stability, five years	0.6 pts	2.1 pts		6.1	229	2026-06-30
Solvency, sleeve percentile 35.0						
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	5.66	3.66		24.8	243	2026-06-30
Net debt to EBITDA	not computable	1.78x				
one or more required annual facts are missing						
Interest coverage	not computable	5.09x				
latest aligned inputs end 2024-06-30; latest annual assets end 2026-06-30						
Current ratio	2.35x	2.25x		45.2	324	2026-06-30
Growth and financing, sleeve percentile 51.6						
Revenue growth, three-year compound	11.2%	2.2%		17.9	269	2026-06-30
Free cash flow growth, three-year compound	(15.0%)	13.9%		89.1	139	2026-06-30
Reinvestment rate	not computable	26.4%				
pretax income must exceed the validity floor and imply a 0%-100% tax rate						
Asset growth, three years	11.5%	4.4%		23.5	278	2026-06-30
Net share issuance, one year	1.0%	0.01%		75.9	242	2026-08-10

Among 255 peers

manufacturing; 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
70	Carlisle Companies Inc. (CSL)	27.2	B	
71	CRH Public Ltd. Co. (CRH)	27.6	B	
72	Janus International Group, Inc. (JBI)	28.0	B	
73	Cricut, Inc. (CRCT)	28.3	B	
74	Powell Industries Inc. (POWL)	28.7	B	fortress balance sheet
75	Twin Disc Inc. (TWIN)	29.1	B	
76	Flowserve Corp. (FLS)	29.5	B	
77	Smith & Wesson Brands, Inc. (SWBI)	29.9	B	
78	Mueller Industries Inc. (MLI)	30.3	B	fortress balance sheet
79	Core Molding Technologies Inc. (CMT)	30.7	B	fortress balance sheet
80	Snap-on Inc. (SNA)	31.1	B	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	66.2%	13.7%	84
Distance from 52-week high	(12.6%)	(25.5%)	78
EBIT to enterprise value	not computable	4.1%	
Free cash flow yield	2.5%	3.4%	39
Book value to price	0.60	0.35	70
Sales to price	1.05	0.55	70

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Composite equity issuance, five years	2.5%	(9.5%)	70
Relative strength against the sector, log excess return	0.37	(0.00)	84

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 5 of 9, period end 2026-06-30	
Return on assets above zero	pass
Operating cash flow above zero	pass
Return on assets improved	pass
Operating cash flow exceeds net income	fail
Long-term leverage fell	pass
Current ratio improved	pass
No new shares issued	fail
Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	n/a
Operating cash flow, four quarters	n/a
Months of runway	not finite
Days since last periodic filing	47 (10-K received Sep 4, 2026)
Median daily dollar volume, 63 sessions	$2.0M

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	$102.6M	2026-06-30	2026-09-04	10-K	26-029700
2	assets	us-gaap:Assets	$401.2M	2026-06-30	2026-09-04	10-K	26-029700
3	net income	us-gaap:NetIncomeLoss	$27.1M	2026-06-30	2026-09-04	10-K	26-029700
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$22.9M	2026-06-30	2026-09-04	10-K	26-029700
5	assets	us-gaap:Assets	$387.7M	2025-06-30	2026-09-04	10-K	26-029700
6	revenue	us-gaap:Revenues	$381.3M	2026-06-30	2026-09-04	10-K	26-029700
7	gross profit	us-gaap:GrossProfit	$93.9M	2025-06-30	2026-09-04	10-K	26-029700
8	revenue	us-gaap:Revenues	$340.7M	2025-06-30	2026-09-04	10-K	26-029700
9	gross profit	us-gaap:GrossProfit	$83.3M	2024-06-30	2025-09-05	10-K	25-028487
10	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$295.1M	2024-06-30	2025-09-05	10-K	25-028487
11	gross profit	us-gaap:GrossProfit	$74.3M	2023-06-30	2024-09-06	10-K	24-028638
12	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$277.0M	2023-06-30	2024-09-06	10-K	24-028638
13	gross profit	us-gaap:GrossProfit	$68.8M	2022-06-30	2023-09-08	10-K	23-025446
14	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$242.9M	2022-06-30	2023-09-08	10-K	23-025446
15	current assets	us-gaap:AssetsCurrent	$278.2M	2026-06-30	2026-09-04	10-K	26-029700
16	current liabilities	us-gaap:LiabilitiesCurrent	$118.6M	2026-06-30	2026-09-04	10-K	26-029700
17	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$182.3M	2026-06-30	2026-09-04	10-K	26-029700
18	operating income	us-gaap:OperatingIncomeLoss	$18.0M	2026-06-30	2026-09-04	10-K	26-029700
19	book equity	us-gaap:StockholdersEquity	$219.7M	2026-06-30	2026-09-04	10-K	26-029700
20	liabilities	us-gaap:Liabilities	$181.3M	2026-06-30	2026-09-04	10-K	26-029700
21	operating income	us-gaap:OperatingIncomeLoss	$11.5M	2024-06-30	2025-09-05	10-K	25-028487
22	interest expense	us-gaap:InterestExpense	$1.4M	2024-06-30	2024-09-06	10-K	24-028638
23	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$13.7M	2026-06-30	2026-09-04	10-K	26-029700
24	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$24.0M	2025-06-30	2026-09-04	10-K	26-029700
25	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$15.2M	2025-06-30	2026-09-04	10-K	26-029700
26	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$33.7M	2024-06-30	2025-09-05	10-K	25-028487
27	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$8.7M	2024-06-30	2025-09-05	10-K	25-028487
28	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$22.9M	2023-06-30	2024-09-06	10-K	24-028638
29	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$7.9M	2023-06-30	2024-09-06	10-K	24-028638

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30	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$13.7M	2026-06-30	2026-09-04	10-K	26-029700
31	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$13.6M	2026-06-30	2026-09-04	10-K	26-029700
32	income tax	us-gaap:IncomeTaxExpenseBenefit	-$14.0M	2026-06-30	2026-09-04	10-K	26-029700
33	current assets	us-gaap:AssetsCurrent	$279.0M	2025-06-30	2026-09-04	10-K	26-029700
34	current liabilities	us-gaap:LiabilitiesCurrent	$125.8M	2025-06-30	2026-09-04	10-K	26-029700
35	assets	us-gaap:Assets	$312.1M	2024-06-30	2025-09-05	10-K	25-028487
36	assets	us-gaap:Assets	$289.2M	2023-06-30	2024-09-06	10-K	24-028638
37	shares outstanding	dei:EntityCommonStockSharesOutstanding	14,538,916	2026-08-10	2026-09-04	10-K	26-029700
38	shares outstanding	dei:EntityCommonStockSharesOutstanding	14,390,226	2025-08-13	2025-09-05	10-K	25-028487

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