# Allegro Microsystems, Inc.

**ALGM**

Nasdaq; business equipment; SIC 3674, Semiconductors & Related Devices; CIK 0000866291

**D**

**fourth fifth of 496 graded peers in business equipment**

rank 334 of 496; percentile 67.3; sampling error 2.2 points; lower is stronger

A B C D E

**D, the sloth**



## Scoreboard

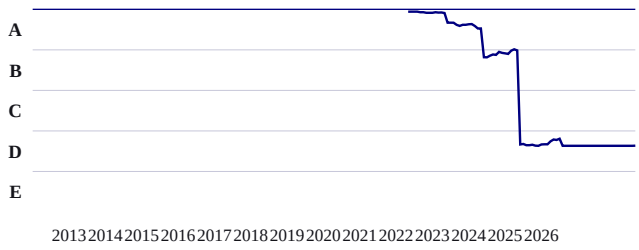
| | |
|---|---|
| **Profitability** | C<br>percentile 56.8 |
| **Solvency** | B/C<br>percentile 41.9 |
| **Growth and financing** | D<br>percentile 65.5 |
| **Reliability** | 0.91 AUC<br>filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025 |
| **Peer failure rate** | 1.01% a year<br>Item 1.03 bankruptcies, same asset band, 2012 to 2025 |
| **Size band** | $591M to $2.67B assets<br>total assets $1.4B |
| **Standard universe** | inside<br>revenue above $1M and assets above $10M |
| **Warnings** | none triggered<br>not computable: distress |
| **Inputs computable** | 13 of 14 |
| **Graded from** | filings received through May 21, 2026<br>154 days before the rescan; latest periodic filing 10-Q received Jul 31, 2026 |
| **Last close** | $34.53<br>2026-10-21; market equity $6.4B; 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 May 21, 2026*

Our mission is to be the leader in global semiconductor technology with sensing and power solutions that drive electrification, automation, AI, and robotics forward. The Company is a global leader in the design, development, and marketing of sensor integrated circuits ("ICs") and application-specific power ICs that enable the sensing, motion control, and power management functions of complex electromechanical or power conversion systems.

## The fourteen inputs

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

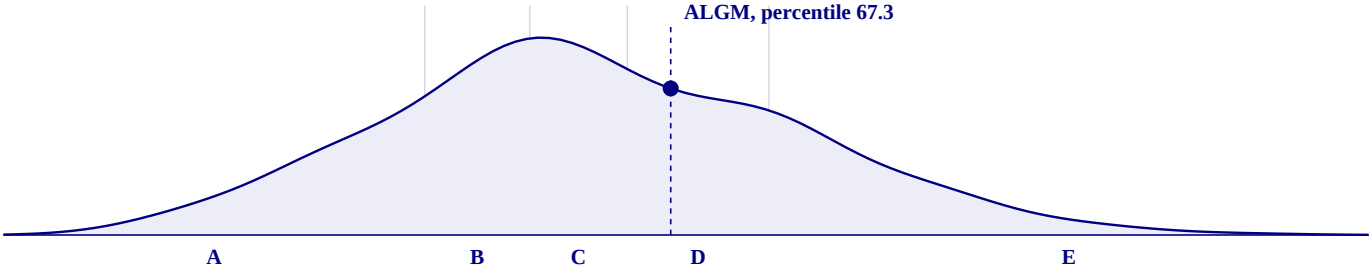
| Input | Value | Peer median | Percentile, 0 to 100 | Pct | Peers | Period end |
|---|---|---|---|---|---|---|
| **Profitability, sleeve percentile 56.8** | | | | | | |
| Gross profitability | 29.1% | 28.6% | | 45.2 | 556 | 2026-03-27 |
| Return on invested capital | 1.6% | 11.2% | | 75.9 | 134 | 2026-03-27 |
| Accruals ratio | (12.5%) | (7.3%) | | 34.0 | 616 | 2026-03-27 |
| Gross margin stability, five years | 4.7 pts | 2.3 pts | | 72.0 | 426 | 2026-03-27 |

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| | | | | | | |
|---|---|---|---|---|---|---|
| **Solvency, sleeve percentile 41.9** | | | | | | |
| Twelve-month failure probability | not computable | 0.05% | | | | |
| *latest liabilities, cash plus short-term investments, book equity, and shares are required* | | | | | | |
| Altman Z double-prime | 3.77 | 2.15 | 30.4 | 563 | 2026-03-27 | |
| Net debt to EBITDA | 1.30x | 1.11x | 52.1 | 147 | 2026-03-27 | |
| Interest coverage | 0.84x | 3.77x | 57.5 | 88 | 2026-03-27 | |
| Current ratio | 3.45x | 2.01x | 27.6 | 660 | 2026-03-27 | |
| **Growth and financing, sleeve percentile 65.5** | | | | | | |
| Revenue growth, three-year compound | (2.9%) | 6.4% | 75.5 | 536 | 2026-03-27 | |
| Free cash flow growth, three-year compound | 3.3% | 18.1% | 72.6 | 264 | 2026-03-27 | |
| Reinvestment rate | (233.8%) | 14.3% | 85.2 | 224 | 2026-03-27 | |
| Asset growth, three years | 6.2% | 5.0% | 43.8 | 561 | 2026-03-27 | |
| Net share issuance, one year | 0.7% | 0.5% | 50.2 | 409 | 2026-05-18 | |

## Among 496 peers

*business equipment; 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 |
|---|---|---|---|---|
| 329 | Shutterstock, Inc. (SSTK) | 66.3 | D | |
| 330 | Analog Devices Inc. (ADI) | 66.5 | D | |
| 331 | TripAdvisor, Inc. (TRIP) | 66.7 | D | fortress balance sheet |
| 332 | Omnicell, Inc. (OMCL) | 66.9 | D | fortress balance sheet |
| 333 | HP Inc. (HPQ) | 67.1 | D | |
| 334 | Allegro Microsystems, Inc. (ALGM) | 67.3 | D | |
| 335 | Franklin Wireless Corp. (FKWL) | 67.5 | D | |
| 336 | Ichor Holdings, Ltd. (ICHR) | 67.7 | D | |
| 337 | Huckleberry.ai, Inc. (HUCK) | 67.9 | D | late filer |
| 338 | Widepoint Corp. (WYY) | 68.1 | D | late filer, fortress balance sheet |
| 339 | MKS Inc. (MKSI) | 68.3 | D | |

## What the price implies

*at the 2026-10-21 close; none of these enters the grade*

| Measure | Value | Peer median | Percentile |
|---|---|---|---|
| Twelve-month price change, skipping the latest month | 24.1% | 2.2% | 68 |
| Distance from 52-week high | (50.4%) | (30.2%) | 28 |
| EBIT to enterprise value | 0.3% | 1.5% | 38 |
| Free cash flow yield | 1.9% | 2.7% | 40 |
| Book value to price | 0.15 | 0.25 | 34 |
| Sales to price | 0.14 | 0.32 | 27 |
| Composite equity issuance, five years | (1.7%) | 4.2% | 40 |
| Relative strength against the sector, log excess return | (0.07) | (0.26) | 68 |

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## Diagnostics

*shown on every report; none enters the grade*

| Measure | Value |
|---|---|
| **Piotroski F-score 6 of 9, period end 2026-03-27** | |
| 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 | pass |
| Current ratio improved | fail |
| No new shares issued | fail |
| Gross margin improved | pass |
| Asset turnover improved | pass |
| **Cash, filings, liquidity** | |
| Cash and equivalents | $162.0M |
| Operating cash flow, four quarters | $123.4M |
| Months of runway | not finite |
| Days since last periodic filing | 83 (10-Q received Jul 31, 2026) |
| Median daily dollar volume, 63 sessions | $87.6M |

## 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 | gross profit | us-gaap:GrossProfit | $412.0M | 2026-03-27 | 2026-05-21 | 10-K | 26-233537 |
| 2 | assets | us-gaap:Assets | $1.4B | 2026-03-27 | 2026-05-21 | 10-K | 26-233537 |
| 3 | operating income | us-gaap:OperatingIncomeLoss | $18.5M | 2026-03-27 | 2026-05-21 | 10-K | 26-233537 |
| 4 | pretax income | us-gaap:IncomeLossFromContinuingOperationsBeforeInc... | -$14.9M | 2026-03-27 | 2026-05-21 | 10-K | 26-233537 |
| 5 | income tax | us-gaap:IncomeTaxExpenseBenefit | -$248,000 | 2026-03-27 | 2026-05-21 | 10-K | 26-233537 |
| 6 | total debt | us-gaap:LongTermDebt | $280.9M | 2026-03-27 | 2026-05-21 | 10-K | 26-233537 |
| 7 | book equity | us-gaap:StockholdersEquity | $954.7M | 2026-03-27 | 2026-05-21 | 10-K | 26-233537 |
| 8 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $168.8M | 2026-03-27 | 2026-05-21 | 10-K | 26-233537 |
| 9 | total debt | us-gaap:LongTermDebt | $338.9M | 2025-03-28 | 2026-05-21 | 10-K | 26-233537 |
| 10 | book equity | us-gaap:StockholdersEquity | $929.6M | 2025-03-28 | 2026-05-21 | 10-K | 26-233537 |
| 11 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $121.3M | 2025-03-28 | 2026-05-21 | 10-K | 26-233537 |
| 12 | net income | us-gaap:NetIncomeLoss | -$14.9M | 2026-03-27 | 2026-05-21 | 10-K | 26-233537 |
| 13 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $163.1M | 2026-03-27 | 2026-05-21 | 10-K | 26-233537 |
| 14 | assets | us-gaap:Assets | $1.4B | 2025-03-28 | 2026-05-21 | 10-K | 26-233537 |
| 15 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $890.1M | 2026-03-27 | 2026-05-21 | 10-K | 26-233537 |
| 16 | gross profit | us-gaap:GrossProfit | $321.5M | 2025-03-28 | 2026-05-21 | 10-K | 26-233537 |
| 17 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $725.0M | 2025-03-28 | 2026-05-21 | 10-K | 26-233537 |
| 18 | gross profit | us-gaap:GrossProfit | $574.5M | 2024-03-29 | 2026-05-21 | 10-K | 26-233537 |
| 19 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $1.0B | 2024-03-29 | 2026-05-21 | 10-K | 26-233537 |
| 20 | gross profit | us-gaap:GrossProfit | $546.1M | 2023-03-31 | 2025-05-22 | 10-K | 25-076059 |
| 21 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $973.7M | 2023-03-31 | 2025-05-22 | 10-K | 25-076059 |
| 22 | gross profit | us-gaap:GrossProfit | $407.5M | 2022-03-25 | 2024-05-23 | 10-K | 24-063770 |
| 23 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $768.7M | 2022-03-25 | 2024-05-23 | 10-K | 24-063770 |
| 24 | current assets | us-gaap:AssetsCurrent | $503.6M | 2026-03-27 | 2026-05-21 | 10-K | 26-233537 |
| 25 | current liabilities | us-gaap:LiabilitiesCurrent | $145.9M | 2026-03-27 | 2026-05-21 | 10-K | 26-233537 |
| 26 | retained earnings | us-gaap:RetainedEarningsAccumulatedDeficit | -$68.5M | 2026-03-27 | 2026-05-21 | 10-K | 26-233537 |
| 27 | liabilities | us-gaap:Liabilities | $459.7M | 2026-03-27 | 2026-05-21 | 10-K | 26-233537 |
| 28 | depreciation amortization | us-gaap:DepreciationDepletionAndAmortization | $67.6M | 2026-03-27 | 2026-05-21 | 10-K | 26-233537 |
| 29 | interest expense | us-gaap:InterestExpense | $22.1M | 2026-03-27 | 2026-05-21 | 10-K | 26-233537 |
| 30 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $38.2M | 2026-03-27 | 2026-05-21 | 10-K | 26-233537 |
| 31 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $61.9M | 2025-03-28 | 2026-05-21 | 10-K | 26-233537 |

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| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| 32 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $40.0M | 2025-03-28 | 2026-05-21 | 10-K | 26-233537 |
| 33 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $181.7M | 2024-03-29 | 2026-05-21 | 10-K | 26-233537 |
| 34 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $124.8M | 2024-03-29 | 2026-05-21 | 10-K | 26-233537 |
| 35 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $193.2M | 2023-03-31 | 2025-05-22 | 10-K | 25-076059 |
| 36 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $79.8M | 2023-03-31 | 2025-05-22 | 10-K | 25-076059 |
| 37 | current assets | us-gaap:AssetsCurrent | $483.0M | 2025-03-28 | 2026-05-21 | 10-K | 26-233537 |
| 38 | current liabilities | us-gaap:LiabilitiesCurrent | $112.3M | 2025-03-28 | 2026-05-21 | 10-K | 26-233537 |
| 39 | assets | us-gaap:Assets | $1.5B | 2024-03-29 | 2025-05-22 | 10-K | 25-076059 |
| 40 | assets | us-gaap:Assets | $1.2B | 2023-03-31 | 2024-05-23 | 10-K | 24-063770 |
| 41 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 186,222,406 | 2026-05-18 | 2026-05-21 | 10-K | 26-233537 |
| 42 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 184,901,228 | 2025-05-19 | 2025-05-22 | 10-K | 25-076059 |

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