Healthcare Services Group Inc. HCSG

Nasdaq; healthcare; SIC 8050, Services-Nursing & Personal Care Facilities; CIK 0000731012

B

second fifth of 370 graded peers in healthcare

rank 107 of 370; percentile 28.7; sampling error 2.5 points; lower is stronger

A B C D E

B, the elk



Scoreboard

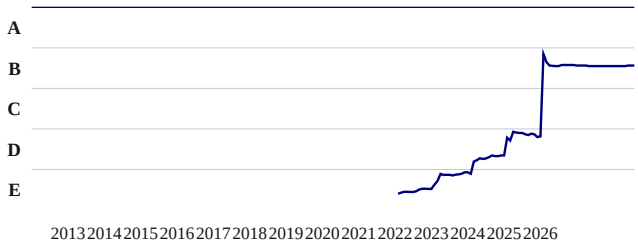
Profitability	B percentile 33.5
Solvency	C percentile 53.2
Growth and financing	B/C percentile 37.8
Reliability	0.91 AUC filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025
Peer failure rate	1.01% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$591M to $2.67B assets total assets $794.3M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress, fortress balance sheet
Inputs computable	7 of 14
Graded from	filings received through Feb 13, 2026 251 days before the rescan; latest periodic filing 10-Q received Jul 24, 2026
Last close	$21.75 2026-10-21; market equity $1.5B; 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

Healthcare Services Group, Inc. is a Pennsylvania corporation, incorporated on November 22, 1976. We provide management, administrative and operating expertise and services to the environmental services, laundry, linen, facility maintenance and dietary service departments of primarily healthcare facilities, including nursing homes, retirement complexes, rehabilitation centers and hospitals located throughout the United States. We provide such services to approximately 2,800 facilities throughout the continental United States as of December 31, 2025.

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 33.5						
Gross profitability	30.1%	32.3%		50.1	368	2025-12-31
Return on invested capital	not computable	9.3%				
one or more required annual facts are missing						

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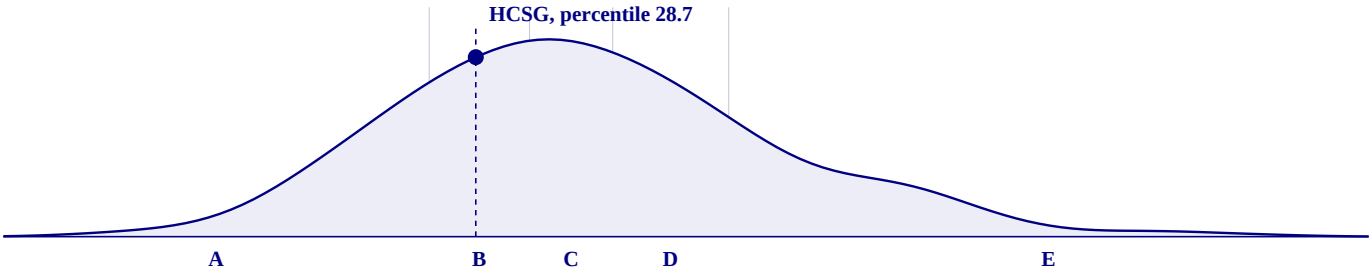
Accruals ratio	(10.8%)	(6.6%)	38.9	809	2025-12-31
Gross margin stability, five years	0.9 pts	2.8 pts	11.6	242	2025-12-31
Solvency, sleeve percentile 53.2					
Twelve-month failure probability	not computable	0.07%			
liabilities and a nearby cover-page share count are required at 2026-06-30					
Altman Z double-prime	not computable	(0.33)			
one or more required annual facts are missing					
Net debt to EBITDA	not computable	1.82x			
one or more required annual facts are missing					
Interest coverage	not computable	(4.51x)			
one or more required annual facts are missing					
Current ratio	3.38x	2.94x	53.2	837	2025-12-31
Growth and financing, sleeve percentile 37.8					
Revenue growth, three-year compound	2.8%	10.1%	64.3	413	2025-12-31
Free cash flow growth, three-year compound	not computable	10.9%			
current FCF must be positive and base FCF must exceed $100,000					
Reinvestment rate	not computable	37.1%			
one or more required annual facts are missing					
Asset growth, three years	3.3%	2.1%	44.6	703	2025-12-31
Net share issuance, one year	(4.4%)	2.5%	4.4	634	2026-02-11

Among 370 peers

healthcare; 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
102	Tela Bio, Inc. (TELA)	27.4	B	fortress balance sheet
103	Alphatec Holdings, Inc. (ATEC)	27.6	B	
104	Agape ATP Corp. (ATPC)	27.9	B	late filer
105	Myriad Genetics Inc. (MYGN)	28.2	B	fortress balance sheet
106	DocGo Inc. (DCGO)	28.5	B	late filer, fortress balance sheet
107	Healthcare Services Group Inc. (HCSG)	28.7	B	
108	Staar Surgical Co. (STAA)	29.0	B	
109	Cytokinetics Inc. (CYTK)	29.3	B	short runway
110	Steris plc (STE)	29.5	B	
111	MSA Safety Inc. (MSA)	29.8	B	
112	Cadre Holdings, Inc. (CDRE)	30.1	B	

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	30.7%	7.7%	66
Distance from 52-week high	(14.2%)	(30.1%)	70
EBIT to enterprise value	not computable	(1.6%)	

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Free cash flow yield	9.3%	(1.0%)	90
Book value to price	0.35	0.28	56
Sales to price	1.23	0.31	85
Composite equity issuance, five years	(17.4%)	20.5%	10
Relative strength against the sector, log excess return	0.06	(0.14)	66

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	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	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$123.4M
Operating cash flow, four quarters	$154.3M
Months of runway	not finite
Days since last periodic filing	90 (10-Q received Jul 24, 2026)
Median daily dollar volume, 63 sessions	$13.9M

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	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.8B	2025-12-31	2026-02-13	10-K	26-000009
2	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$1.6B	2025-12-31	2026-02-13	10-K	26-000009
3	assets	us-gaap:Assets	$794.3M	2025-12-31	2026-02-13	10-K	26-000009
4	net income	us-gaap:NetIncomeLoss	$59.1M	2025-12-31	2026-02-13	10-K	26-000009
5	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$145.0M	2025-12-31	2026-02-13	10-K	26-000009
6	assets	us-gaap:Assets	$802.8M	2024-12-31	2026-02-13	10-K	26-000009
7	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.7B	2024-12-31	2026-02-13	10-K	26-000009
8	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$1.5B	2024-12-31	2026-02-13	10-K	26-000009
9	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.7B	2023-12-31	2026-02-13	10-K	26-000009
10	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$1.5B	2023-12-31	2026-02-13	10-K	26-000009
11	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.7B	2022-12-31	2025-02-14	10-K	25-000032
12	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$1.5B	2022-12-31	2025-02-14	10-K	25-000032
13	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.6B	2021-12-31	2024-02-16	10-K	24-000025
14	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$1.4B	2021-12-31	2024-02-16	10-K	24-000025
15	current assets	us-gaap:AssetsCurrent	$576.4M	2025-12-31	2026-02-13	10-K	26-000009
16	current liabilities	us-gaap:LiabilitiesCurrent	$170.4M	2025-12-31	2026-02-13	10-K	26-000009
17	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$5.8M	2025-12-31	2026-02-13	10-K	26-000009
18	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$30.8M	2024-12-31	2026-02-13	10-K	26-000009
19	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$6.3M	2024-12-31	2026-02-13	10-K	26-000009
20	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$43.5M	2023-12-31	2026-02-13	10-K	26-000009
21	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$5.4M	2023-12-31	2026-02-13	10-K	26-000009
22	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$8.2M	2022-12-31	2025-02-14	10-K	25-000032
23	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$5.2M	2022-12-31	2025-02-14	10-K	25-000032
24	assets	us-gaap:Assets	$790.7M	2023-12-31	2025-02-14	10-K	25-000032
25	assets	us-gaap:Assets	$720.8M	2022-12-31	2024-02-16	10-K	24-000025

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26	shares outstanding	dei:EntityCommonStockSharesOutstanding	70,267,582	2026-02-11	2026-02-13	10-K	26-000009
27	shares outstanding	dei:EntityCommonStockSharesOutstanding	73,487,743	2025-02-12	2025-02-14	10-K	25-000032