# Sitime Corp.

**SITM**

Nasdaq; business equipment; SIC 3674, Semiconductors & Related Devices; CIK 0001451809

**A**

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

rank 75 of 496; percentile 14.9; sampling error 2.2 points; lower is stronger

A B C D E

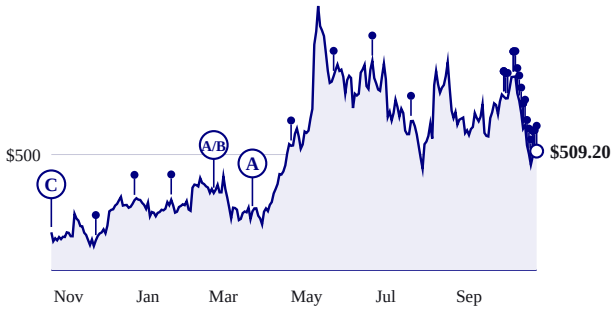
**A, the bull**



## Scoreboard

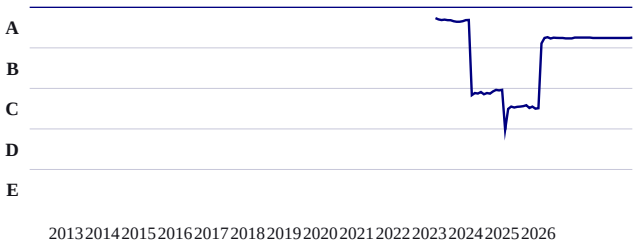
| | | |
|---|---|---|
| **Profitability** | C/D | percentile 61.8 |
| **Solvency** | A | percentile 5.4 |
| **Growth and financing** | B/C | percentile 41.5 |
| **Reliability** | 0.91 AUC | filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025 |
| **Peer failure rate** | 1.01% a year | Item 1.03 bankruptcies, same asset band, 2012 to 2025 |
| **Size band** | $591M to $2.67B assets | total assets $1.3B |
| **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 Feb 11, 2026 | 253 days before the rescan; latest periodic filing 10-Q received Aug 6, 2026 |
| **Last close** | $509.70 | 2026-10-21; market equity $15.3B; 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 11, 2026*

The ability to accurately measure and reference time has been essential to humankind's greatest inventions and technological advances. Timing technology has continued to evolve over centuries, underpinning broader technological evolution and is the heartbeat of digital electronic systems. Timing ensures that the system runs smoothly and reliably by providing and distributing clock signals to various critical components such as central processing units, communication and interface ICs, and radio frequency components.

## 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 61.8** | | | | | | |
| Gross profitability | 13.5% | 28.6% | | 75.5 | 556 | 2025-12-31 |
| Return on invested capital | not computable | 11.2% | | | | |

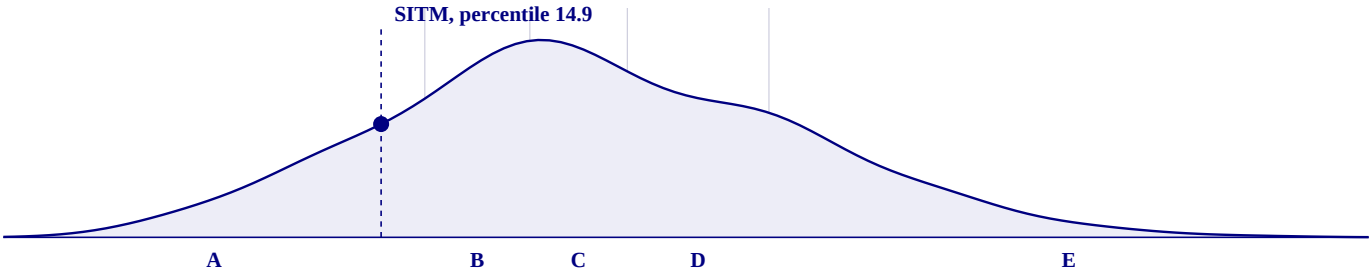
*one or more required annual facts are missing*

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| | | | | | | |
|---|---|---|---|---|---|---|
| Accruals ratio | (11.9%) | (7.3%) | | 35.8 | 616 | 2025-12-31 |
| Gross margin stability, five years | 5.2 pts | 2.3 pts | | 74.1 | 426 | 2025-12-31 |
| **Solvency, sleeve percentile 5.4** | | | | | | |
| 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 | 12.23 | 2.15 | | 4.8 | 563 | 2025-12-31 |
| Net debt to EBITDA | not computable | 1.11x | | | | |
| *one or more required annual facts are missing* | | | | | | |
| Interest coverage | not computable | 3.77x | | | | |
| *latest aligned inputs end 2020-12-31; latest annual assets end 2025-12-31* | | | | | | |
| Current ratio | 11.30x | 2.01x | | 6.1 | 660 | 2025-12-31 |
| **Growth and financing, sleeve percentile 41.5** | | | | | | |
| Revenue growth, three-year compound | 4.8% | 6.4% | | 53.8 | 536 | 2025-12-31 |
| Free cash flow growth, three-year compound | 64.0% | 18.1% | | 14.8 | 264 | 2025-12-31 |
| Reinvestment rate | not computable | 14.3% | | | | |
| *pretax income must exceed the validity floor and imply a 0%-100% tax rate* | | | | | | |
| Asset growth, three years | 19.9% | 5.0% | | 18.2 | 561 | 2025-12-31 |
| Net share issuance, one year | 11.5% | 0.5% | | 79.2 | 409 | 2026-02-05 |

## 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 |
|---|---|---|---|---|
| 70 | Zeta Global Holdings Corp. (ZETA) | 13.9 | A | fortress balance sheet |
| 71 | NetApp, Inc. (NTAP) | 14.1 | A | |
| 72 | Grindr Inc. (GRND) | 14.3 | A | |
| 73 | Photronics Inc. (PLAB) | 14.5 | A | fortress balance sheet |
| 74 | Lattice Semiconductor Corp. (LSCC) | 14.7 | A | |
| 75 | Sitime Corp. (SITM) | 14.9 | A | |
| 76 | Upwork, Inc. (UPWK) | 15.2 | A | |
| 77 | Onto Innovation Inc. (ONTO) | 15.4 | A | fortress balance sheet |
| 78 | Zoom Communications, Inc. (ZM) | 15.6 | A | |
| 79 | Procore Technologies, Inc. (PCOR) | 15.8 | A | |
| 80 | Nextdoor Holdings, Inc. (NXDR) | 16.0 | A | |

## 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 | 87.7% | 2.2% | 88 |
| Distance from 52-week high | (43.5%) | (30.2%) | 36 |
| EBIT to enterprise value | not computable | 1.5% | |
| Free cash flow yield | 0.2% | 2.7% | 26 |
| Book value to price | 0.07 | 0.25 | 18 |

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| | | | |
|---|---|---|---|
| Sales to price | 0.02 | 0.32 | 2 |
| Composite equity issuance, five years | 56.2% | 4.2% | 87 |
| Relative strength against the sector, log excess return | 0.35 | (0.26) | 88 |

## 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 | fail |
| 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 | fail |
| Gross margin improved | pass |
| Asset turnover improved | pass |
| **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 | 77 (10-Q received Aug 6, 2026) |
| Median daily dollar volume, 63 sessions | $247.3M |

## 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 | $175.0M | 2025-12-31 | 2026-02-11 | 10-K | 26-000012 |
| 2 | assets | us-gaap:Assets | $1.3B | 2025-12-31 | 2026-02-11 | 10-K | 26-000012 |
| 3 | net income | us-gaap:NetIncomeLoss | -$42.9M | 2025-12-31 | 2026-02-11 | 10-K | 26-000012 |
| 4 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $87.2M | 2025-12-31 | 2026-02-11 | 10-K | 26-000012 |
| 5 | assets | us-gaap:Assets | $885.0M | 2024-12-31 | 2026-02-11 | 10-K | 26-000012 |
| 6 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $326.7M | 2025-12-31 | 2026-02-11 | 10-K | 26-000012 |
| 7 | gross profit | us-gaap:GrossProfit | $104.5M | 2024-12-31 | 2026-02-11 | 10-K | 26-000012 |
| 8 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $202.7M | 2024-12-31 | 2026-02-11 | 10-K | 26-000012 |
| 9 | gross profit | us-gaap:GrossProfit | $82.1M | 2023-12-31 | 2026-02-11 | 10-K | 26-000012 |
| 10 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $144.0M | 2023-12-31 | 2026-02-11 | 10-K | 26-000012 |
| 11 | gross profit | us-gaap:GrossProfit | $183.0M | 2022-12-31 | 2025-02-14 | 10-K | 25-000034 |
| 12 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $283.6M | 2022-12-31 | 2025-02-14 | 10-K | 25-000034 |
| 13 | gross profit | us-gaap:GrossProfit | $139.5M | 2021-12-31 | 2024-02-26 | 10-K | 24-000052 |
| 14 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $218.8M | 2021-12-31 | 2024-02-26 | 10-K | 24-000052 |
| 15 | current assets | us-gaap:AssetsCurrent | $949.3M | 2025-12-31 | 2026-02-11 | 10-K | 26-000012 |
| 16 | current liabilities | us-gaap:LiabilitiesCurrent | $84.0M | 2025-12-31 | 2026-02-11 | 10-K | 26-000012 |
| 17 | retained earnings | us-gaap:RetainedEarningsAccumulatedDeficit | -$224.9M | 2025-12-31 | 2026-02-11 | 10-K | 26-000012 |
| 18 | operating income | us-gaap:OperatingIncomeLoss | -$67.0M | 2025-12-31 | 2026-02-11 | 10-K | 26-000012 |
| 19 | book equity | us-gaap:StockholdersEquity | $1.2B | 2025-12-31 | 2026-02-11 | 10-K | 26-000012 |
| 20 | liabilities | us-gaap:Liabilities | $138.5M | 2025-12-31 | 2026-02-11 | 10-K | 26-000012 |
| 21 | operating income | us-gaap:OperatingIncomeLoss | -$8.6M | 2020-12-31 | 2023-02-27 | 10-K | 23-004647 |
| 22 | interest expense | us-gaap:InterestExpense | $726,000 | 2020-12-31 | 2022-02-25 | 10-K | 22-002096 |
| 23 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $52.0M | 2025-12-31 | 2026-02-11 | 10-K | 26-000012 |
| 24 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $23.2M | 2024-12-31 | 2026-02-11 | 10-K | 26-000012 |
| 25 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $36.2M | 2024-12-31 | 2026-02-11 | 10-K | 26-000012 |
| 26 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $8.1M | 2023-12-31 | 2026-02-11 | 10-K | 26-000012 |
| 27 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $8.9M | 2023-12-31 | 2026-02-11 | 10-K | 26-000012 |

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| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| 28 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $39.8M | 2022-12-31 | 2025-02-14 | 10-K | 25-000034 |
| 29 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $31.8M | 2022-12-31 | 2025-02-14 | 10-K | 25-000034 |
| 30 | depreciation amortization | us-gaap:DepreciationDepletionAndAmortization | $40.2M | 2025-12-31 | 2026-02-11 | 10-K | 26-000012 |
| 31 | pretax income | us-gaap:IncomeLossFromContinuingOperationsBeforeInc... | -$42.3M | 2025-12-31 | 2026-02-11 | 10-K | 26-000012 |
| 32 | income tax | us-gaap:IncomeTaxExpenseBenefit | $598,000 | 2025-12-31 | 2026-02-11 | 10-K | 26-000012 |
| 33 | current assets | us-gaap:AssetsCurrent | $544.1M | 2024-12-31 | 2026-02-11 | 10-K | 26-000012 |
| 34 | current liabilities | us-gaap:LiabilitiesCurrent | $108.4M | 2024-12-31 | 2026-02-11 | 10-K | 26-000012 |
| 35 | assets | us-gaap:Assets | $951.7M | 2023-12-31 | 2025-02-14 | 10-K | 25-000034 |
| 36 | assets | us-gaap:Assets | $750.6M | 2022-12-31 | 2024-02-26 | 10-K | 24-000052 |
| 37 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 26,299,915 | 2026-02-05 | 2026-02-11 | 10-K | 26-000012 |
| 38 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 23,597,831 | 2025-02-10 | 2025-02-14 | 10-K | 25-000034 |

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