DHI Group, Inc.

DHX

NYSE; other; SIC 7389, Services-Business Services, NEC; CIK 0001393883

D

fourth fifth of 334 graded peers in other

rank 214 of 334; percentile 64.0; sampling error 2.7 points; lower is stronger

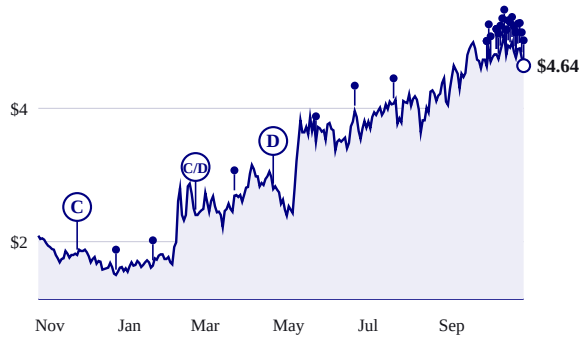
A B C D E

D, the sloth



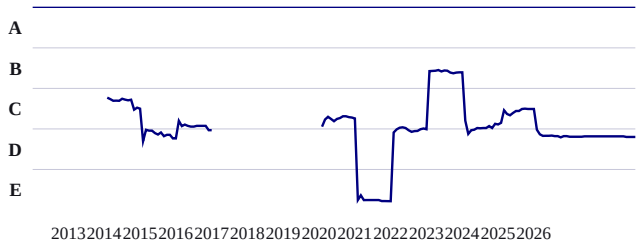
Scoreboard	
Profitability	A/B percentile 18.4
Solvency	D/E percentile 79.4
Growth and financing	C/D percentile 61.0
Reliability	0.87 AUC filers with $120M to $591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025
Peer failure rate	1.03% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$120M to $591M assets total assets $188.2M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress
Inputs computable	10 of 14
Graded from	filings received through Feb 12, 2026 255 days before the rescan; latest periodic filing 10-Q received Aug 5, 2026
Last close	$4.63 2026-10-23; market equity $201.1M; 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 Feb 12, 2026

This section provides an overview of DHI Group, Inc. ("DHI," the "Company," "we," "us," or "our"). Please see our consolidated financial statements included elsewhere in this report for additional discussion regarding our results of operations for the year ended December 31, 2025. (1) For the year ended December 31, 2025, net loss and diluted loss per share includes the net negative impact of non-cash stock-based compensation, restructuring, impairments, and severance, professional fees and related costs of $32.8 million ($26.7 million net of tax) and discrete tax items of $0.1 million, resulting in a net negative impact of $26.8 million, or $0.59 per diluted share.

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 18.4						
Gross profitability	57.5%	27.1%		12.6	286	2025-12-31
Return on invested capital	not computable	10.0%				

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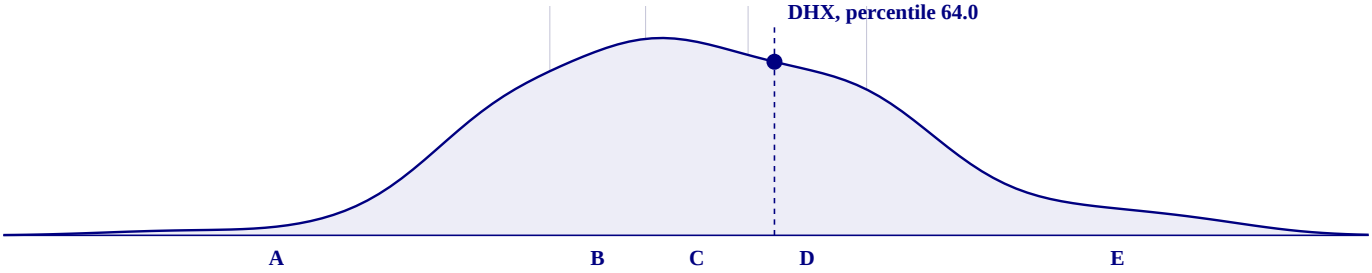
pretax income must exceed the validity floor and imply a 0%-100% tax rate

Accruals ratio	(16.9%)	(5.8%)	13.8	502	2025-12-31
Gross margin stability, five years	1.3 pts	2.2 pts	28.9	205	2025-12-31
Solvency, sleeve percentile 79.4					
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	(0.09)	2.05	61.4	384	2025-12-31
Net debt to EBITDA	not computable	2.52x			
latest aligned inputs end 2022-12-31; latest annual assets end 2025-12-31					
Interest coverage	(4.63x)	2.18x	86.2	88	2025-12-31
Current ratio	0.44x	1.33x	90.7	504	2025-12-31
Growth and financing, sleeve percentile 61.0					
Revenue growth, three-year compound	(5.1%)	5.1%	83.7	399	2025-12-31
Free cash flow growth, three-year compound	(8.6%)	8.9%	71.1	219	2025-12-31
Reinvestment rate	not computable	11.9%			
NOPAT must exceed $100,000					
Asset growth, three years	(6.0%)	4.1%	83.4	435	2025-12-31
Net share issuance, one year	(8.1%)	(0.5%)	5.7	354	2026-02-06

Among 334 peers

other; 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
209	TransUnion (TRU)	62.5	C/D	
210	Iqvia Holdings Inc. (IQV)	62.8	D	
211	Corpay, Inc. (CPAY)	63.1	D	
212	Marriott International Inc. (MAR)	63.4	D	
213	Bright Horizons Family Solutions Inc. (BFAM)	63.7	D	
214	DHI Group, Inc. (DHX)	64.0	D	
215	Walt Disney Co. (DIS)	64.3	D	
216	Alaska AIR Group, Inc. (ALK)	64.6	D	
217	Custom Truck One Source, Inc. (CTOS)	64.9	D	
218	Knight-Swift Transportation Holdings Inc. (KNX)	65.2	D	
219	Expeditors International OF Washington Inc. (EXPD)	65.5	D	

What the price implies

at the 2026-10-23 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	54.3%	2.0%	86
Distance from 52-week high	(9.0%)	(25.2%)	76
EBIT to enterprise value	(5.0%)	4.3%	13
Free cash flow yield	6.8%	4.1%	70
Book value to price	0.47	0.34	64

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Sales to price	0.63	0.72	46
Composite equity issuance, five years	(18.5%)	(8.8%)	34
Relative strength against the sector, log excess return	0.29	(0.13)	86

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 3 of 9, period end 2025-12-31	
Return on assets above zero	fail
Operating cash flow above zero	pass
Return on assets improved	fail
Operating cash flow exceeds net income	pass
Long-term leverage fell	fail
Current ratio improved	fail
No new shares issued	pass
Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$3.8M
Operating cash flow, four quarters	$26.5M
Months of runway	not finite
Days since last periodic filing	81 (10-Q received Aug 5, 2026)
Median daily dollar volume, 63 sessions	$1.0M

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	revenue	us-gaap:Revenues	$127.8M	2025-12-31	2026-02-12	10-K	26-000041
2	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$19.6M	2025-12-31	2026-02-12	10-K	26-000041
3	assets	us-gaap:Assets	$188.2M	2025-12-31	2026-02-12	10-K	26-000041
4	operating income	us-gaap:OperatingIncomeLoss	$5.6M	2022-12-31	2025-02-12	10-K	25-000041
5	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$3.6M	2022-12-31	2025-02-12	10-K	25-000041
6	income tax	us-gaap:IncomeTaxExpenseBenefit	-$579,000	2022-12-31	2025-02-12	10-K	25-000041
7	total debt	us-gaap:LongTermDebt	$30.0M	2022-12-31	2023-02-10	10-K	23-000062
8	book equity	us-gaap:StockholdersEquity	$106.2M	2022-12-31	2026-02-12	10-K	26-000041
9	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$3.0M	2022-12-31	2024-02-08	10-K	24-000040
10	total debt	us-gaap:LongTermDebt	$22.7M	2021-12-31	2023-02-10	10-K	23-000062
11	book equity	us-gaap:StockholdersEquity	$116.4M	2021-12-31	2023-02-10	10-K	23-000062
12	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$1.5M	2021-12-31	2023-02-10	10-K	23-000062
13	net income	us-gaap:NetIncomeLoss	-$13.5M	2025-12-31	2026-02-12	10-K	26-000041
14	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$21.1M	2025-12-31	2026-02-12	10-K	26-000041
15	assets	us-gaap:Assets	$221.4M	2024-12-31	2026-02-12	10-K	26-000041
16	revenue	us-gaap:Revenues	$141.9M	2024-12-31	2026-02-12	10-K	26-000041
17	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$20.2M	2024-12-31	2026-02-12	10-K	26-000041
18	revenue	us-gaap:Revenues	$151.9M	2023-12-31	2026-02-12	10-K	26-000041
19	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$19.8M	2023-12-31	2026-02-12	10-K	26-000041
20	revenue	us-gaap:Revenues	$149.7M	2022-12-31	2025-02-12	10-K	25-000041
21	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$17.6M	2022-12-31	2025-02-12	10-K	25-000041
22	revenue	us-gaap:Revenues	$119.9M	2021-12-31	2024-02-08	10-K	24-000040
23	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$15.1M	2021-12-31	2024-02-08	10-K	24-000040
24	current assets	us-gaap:AssetsCurrent	$24.5M	2025-12-31	2026-02-12	10-K	26-000041
25	current liabilities	us-gaap:LiabilitiesCurrent	$55.1M	2025-12-31	2026-02-12	10-K	26-000041
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$19.0M	2025-12-31	2026-02-12	10-K	26-000041
27	operating income	us-gaap:OperatingIncomeLoss	-$11.4M	2025-12-31	2026-02-12	10-K	26-000041

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28	book equity	us-gaap:StockholdersEquity	$94.5M	2025-12-31	2026-02-12	10-K	26-000041
29	liabilities	us-gaap:Liabilities	$93.7M	2025-12-31	2026-02-12	10-K	26-000041
30	depreciation amortization	us-gaap:Depreciation	$17.5M	2022-12-31	2025-02-12	10-K	25-000041
31	interest expense	us-gaap:InterestExpense	$2.5M	2025-12-31	2026-02-12	10-K	26-000041
32	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$7.3M	2025-12-31	2026-02-12	10-K	26-000041
33	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$21.0M	2024-12-31	2026-02-12	10-K	26-000041
34	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$13.9M	2024-12-31	2026-02-12	10-K	26-000041
35	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$21.3M	2023-12-31	2026-02-12	10-K	26-000041
36	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$20.3M	2023-12-31	2026-02-12	10-K	26-000041
37	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$36.0M	2022-12-31	2025-02-12	10-K	25-000041
38	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$18.0M	2022-12-31	2025-02-12	10-K	25-000041
39	depreciation amortization	us-gaap:Depreciation	$14.2M	2025-12-31	2026-02-12	10-K	26-000041
40	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$14.7M	2025-12-31	2026-02-12	10-K	26-000041
41	income tax	us-gaap:IncomeTaxExpenseBenefit	-$1.2M	2025-12-31	2026-02-12	10-K	26-000041
42	current assets	us-gaap:AssetsCurrent	$29.7M	2024-12-31	2026-02-12	10-K	26-000041
43	current liabilities	us-gaap:LiabilitiesCurrent	$62.7M	2024-12-31	2026-02-12	10-K	26-000041
44	assets	us-gaap:Assets	$225.2M	2023-12-31	2025-02-12	10-K	25-000041
45	assets	us-gaap:Assets	$226.7M	2022-12-31	2024-02-08	10-K	24-000040
46	shares outstanding	dei:EntityCommonStockSharesOutstanding	44,970,004	2026-02-06	2026-02-12	10-K	26-000041
47	shares outstanding	dei:EntityCommonStockSharesOutstanding	48,922,271	2025-01-31	2025-02-12	10-K	25-000041

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