Resources Connection, Inc.

RGP

Nasdaq; other; SIC 7389, Services-Business Services, NEC; CIK 0001084765

C

middle fifth of 334 graded peers in other

rank 166 of 334; percentile 49.5; sampling error 2.7 points; lower is stronger

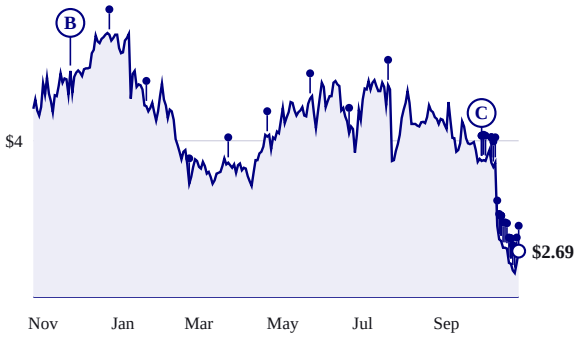
A B C D E

C, the tortoise



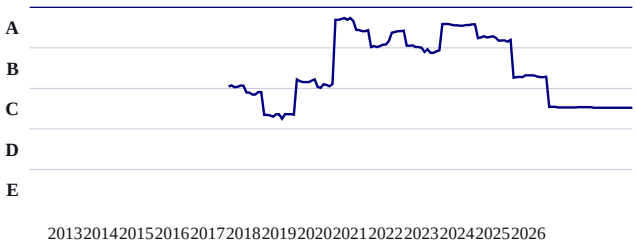
Scoreboard	
Profitability	A percentile 16.2
Solvency	B percentile 34.2
Growth and financing	E percentile 91.7
Reliability	0.87 AUC filers with $120M to $591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025
Peer failure rate	1.03% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$120M to $591M assets total assets $257.4M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress, fortress balance sheet
Inputs computable	9 of 14
Graded from	filings received through Jul 24, 2026 94 days before the rescan; latest periodic filing 10-Q received Oct 7, 2026
Last close	$2.69 2026-10-23; market equity $93.2M; 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 Jul 24, 2026

Resources Connection, Inc. ("RGP," the "Company," "we" or "us") is a global professional services firm based in Dallas, Texas (with offices worldwide) with three decades of experience helping the world's top organizations navigate change and seize opportunity. With three integrated offerings-On-Demand Talent, Consulting, and Outsourced Services-the Company provides CFOs and other C-suite leaders with the flexibility to solve today's most pressing challenges. The Company's principal markets of operations are North America, Europe & Asia Pacific.

The fourteen inputs

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

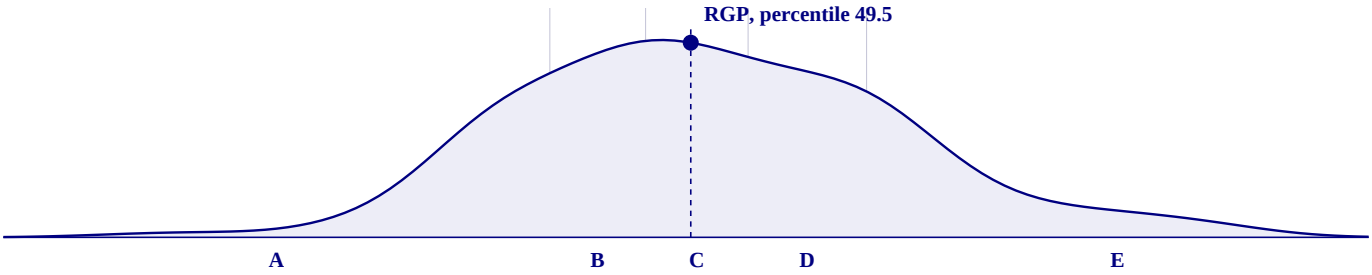
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 16.2						
Gross profitability	65.9%	27.1%		9.5	286	2026-05-30
Return on invested capital	not computable	10.0%				
one or more required annual facts are missing						

Not investment advice. Informational and educational only. Data from SEC EDGAR, may contain errors, is not warranted. The grade ranks reported financial condition and is not a return forecast.

Accruals ratio	(15.0%)	(5.8%)	17.0	502	2026-05-30
Gross margin stability, five years	1.1 pts	2.2 pts	22.1	205	2026-05-30
Solvency, sleeve percentile 34.2					
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	1.43	2.05	48.6	384	2026-05-30
Net debt to EBITDA	not computable	2.52x			
one or more required annual facts are missing					
Interest coverage	not computable	2.18x			
latest aligned inputs end 2023-05-27; latest annual assets end 2026-05-30					
Current ratio	2.51x	1.33x	19.9	504	2026-05-30
Growth and financing, sleeve percentile 91.7					
Revenue growth, three-year compound	(16.5%)	5.1%	93.7	399	2026-05-30
Free cash flow growth, three-year compound	(80.2%)	8.9%	100.0	219	2026-05-30
Reinvestment rate	not computable	11.9%			
pretax income must exceed the validity floor and imply a 0%-100% tax rate					
Asset growth, three years	(21.5%)	4.1%	96.8	435	2026-05-30
Net share issuance, one year	3.3%	(0.5%)	76.2	354	2026-07-15

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
161	Rollins Inc. (ROL)	48.0	C	
162	Orion Group Holdings Inc. (ORN)	48.3	C	fortress balance sheet
163	RB Global Inc. (RBA)	48.6	C	
164	Jacobs Solutions Inc. (J)	48.9	C	
165	Smart Sand, Inc. (SND)	49.2	C	fortress balance sheet
166	Resources Connection, Inc. (RGP)	49.5	C	
167	Mistras Group, Inc. (MG)	49.8	C	
168	XPO, Inc. (XPO)	50.2	C	
169	APi Group Corp. (APG)	50.5	C	
170	Casella Waste Systems Inc. (CWST)	50.8	C	
171	Covenant Logistics Group, Inc. (CVLG)	51.1	C	

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	(14.2%)	2.0%	35
Distance from 52-week high	(49.1%)	(25.2%)	23
EBIT to enterprise value	not computable	4.3%	
Free cash flow yield	0.7%	4.1%	26
Book value to price	1.73	0.34	95

Not investment advice. Informational and educational only. Data from SEC EDGAR, may contain errors, is not warranted. The grade ranks reported financial condition and is not a return forecast.

Sales to price	4.84	0.72	92
Composite equity issuance, five years	(17.7%)	(8.8%)	36
Relative strength against the sector, log excess return	(0.30)	(0.13)	35

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score None of 9, period end 2026-05-30	
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	fail
No new shares issued	fail
Gross margin improved	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$61.2M
Operating cash flow, four quarters	-$9.6M
Months of runway	76.5
Days since last periodic filing	19 (10-Q received Oct 7, 2026)
Median daily dollar volume, 63 sessions	$1.2M

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	$169.7M	2026-05-30	2026-07-24	10-K	26-000051
2	assets	us-gaap:Assets	$257.4M	2026-05-30	2026-07-24	10-K	26-000051
3	net income	us-gaap:NetIncomeLoss	-$40.6M	2026-05-30	2026-07-24	10-K	26-000051
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$1.4M	2026-05-30	2026-07-24	10-K	26-000051
5	assets	us-gaap:Assets	$304.7M	2025-05-31	2026-07-24	10-K	26-000051
6	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$452.0M	2026-05-30	2026-07-24	10-K	26-000051
7	gross profit	us-gaap:GrossProfit	$207.4M	2025-05-31	2026-07-24	10-K	26-000051
8	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$551.3M	2025-05-31	2026-07-24	10-K	26-000051
9	gross profit	us-gaap:GrossProfit	$246.1M	2024-05-25	2026-07-24	10-K	26-000051
10	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$632.8M	2024-05-25	2026-07-24	10-K	26-000051
11	gross profit	us-gaap:GrossProfit	$313.1M	2023-05-27	2025-07-28	10-K	25-000115
12	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$775.6M	2023-05-27	2025-07-28	10-K	25-000115
13	gross profit	us-gaap:GrossProfit	$316.6M	2022-05-28	2024-07-22	10-K	24-000089
14	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$805.0M	2022-05-28	2024-07-22	10-K	24-000089
15	current assets	us-gaap:AssetsCurrent	$169.6M	2026-05-30	2026-07-24	10-K	26-000051
16	current liabilities	us-gaap:LiabilitiesCurrent	$67.5M	2026-05-30	2026-07-24	10-K	26-000051
17	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$174.3M	2026-05-30	2026-07-24	10-K	26-000051
18	operating income	us-gaap:OperatingIncomeLoss	-$38.3M	2026-05-30	2026-07-24	10-K	26-000051
19	book equity	us-gaap:StockholdersEquity	$169.8M	2026-05-30	2026-07-24	10-K	26-000051
20	liabilities	us-gaap:Liabilities	$87.6M	2026-05-30	2026-07-24	10-K	26-000051
21	operating income	us-gaap:OperatingIncomeLoss	$72.8M	2023-05-27	2025-07-28	10-K	25-000115
22	interest expense	us-gaap:InterestExpense	$552,000	2023-05-27	2023-07-25	10-K	23-000016
23	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$808,000	2026-05-30	2026-07-24	10-K	26-000051
24	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$18.9M	2025-05-31	2026-07-24	10-K	26-000051
25	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$2.7M	2025-05-31	2026-07-24	10-K	26-000051
26	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$21.9M	2024-05-25	2026-07-24	10-K	26-000051
27	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$1.1M	2024-05-25	2026-07-24	10-K	26-000051

Not investment advice. Informational and educational only. Data from SEC EDGAR, may contain errors, is not warranted. The grade ranks reported financial condition and is not a return forecast.

28	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$81.6M	2023-05-27	2025-07-28	10-K	25-000115
29	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$2.0M	2023-05-27	2025-07-28	10-K	25-000115
30	depreciation amortization	us-gaap:Depreciation	$1.3M	2026-05-30	2026-07-24	10-K	26-000051
31	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$38.1M	2026-05-30	2026-07-24	10-K	26-000051
32	income tax	us-gaap:IncomeTaxExpenseBenefit	$2.5M	2026-05-30	2026-07-24	10-K	26-000051
33	current assets	us-gaap:AssetsCurrent	$203.7M	2025-05-31	2026-07-24	10-K	26-000051
34	current liabilities	us-gaap:LiabilitiesCurrent	$75.4M	2025-05-31	2026-07-24	10-K	26-000051
35	assets	us-gaap:Assets	$510.9M	2024-05-25	2025-07-28	10-K	25-000115
36	assets	us-gaap:Assets	$532.0M	2023-05-27	2024-07-22	10-K	24-000089
37	shares outstanding	dei:EntityCommonStockSharesOutstanding	34,443,626	2026-07-15	2026-07-24	10-K	26-000051
38	shares outstanding	dei:EntityCommonStockSharesOutstanding	33,339,883	2025-07-18	2025-07-28	10-K	25-000115

Not investment advice. Informational and educational only. Data from SEC EDGAR, may contain errors, is not warranted. The grade ranks reported financial condition and is not a return forecast.