Standard Motor Products, Inc. SMP

NYSE; consumer durables; SIC 3714, Motor Vehicle Parts & Accessories; CIK 0000093389

B

second fifth of 457 graded peers in the pooled consumer group

rank 113 of 457; percentile 25.4; sampling error 2.3 points; lower is stronger

A B C D E

B, the elk



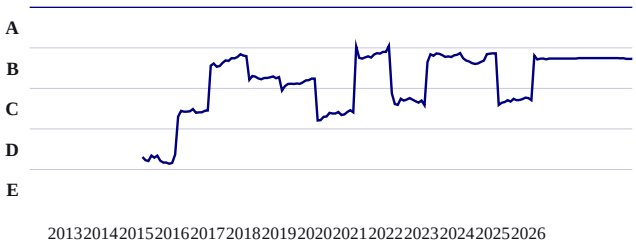
Scoreboard	
Profitability	C/D percentile 57.9
Solvency	B percentile 31.5
Growth and financing	B percentile 31.7
Reliability	0.91 AUC filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025
Peer failure rate	1.01% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$591M to $2.67B assets total assets $2.0B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: short runway, distress
Inputs computable	9 of 14
Graded from	filings received through Feb 26, 2026 242 days before the rescan; latest periodic filing 10-Q received Aug 4, 2026
Last close	$37.34 2026-10-23; market equity $834.1M; 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 26, 2026

We are a leading manufacturer and distributor of premium replacement parts in the automotive aftermarket and a custom-engineered solutions provider to vehicle and equipment manufacturers in diverse non-aftermarket end markets. Our business is organized into four operating segments: Vehicle Control, Temperature Control, Nissens Automotive and Engineered Solutions. Nissens Automotive was created in the fourth quarter of 2024 following the completion of our acquisition of AX V Nissens III ApS (now known as SMP Nissens III ApS) and its direct and indirect subsidiaries ("Nissens Automotive") in November 2024.

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 57.9						
Gross profitability	28.0%	34.4%		57.6	470	2025-12-31
Return on invested capital	not computable	8.9%				

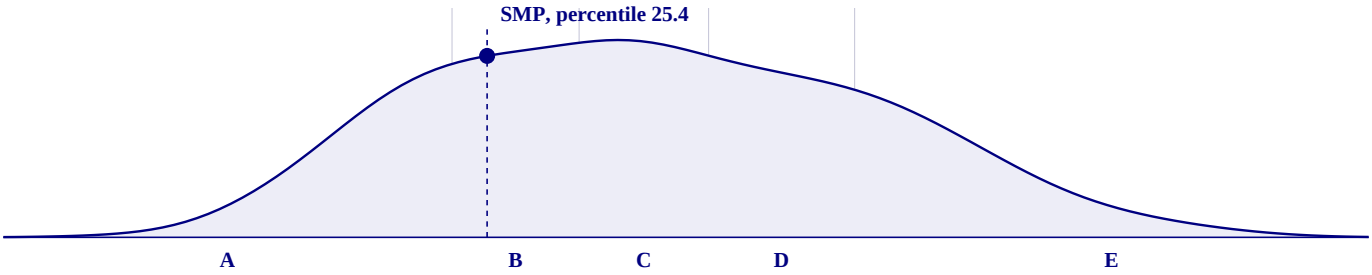
latest aligned inputs end 2024-12-31; latest annual assets end 2025-12-31

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Accruals ratio	(0.8%)	(5.1%)	84.4	519	2025-12-31
Gross margin stability, five years	1.1 pts	1.7 pts	31.7	405	2025-12-31
Solvency, sleeve percentile 31.5					
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	3.81	2.13	31.0	398	2025-12-31
Net debt to EBITDA	not computable	2.08x			
latest aligned inputs end 2024-12-31; latest annual assets end 2025-12-31					
Interest coverage	not computable	2.70x			
latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31					
Current ratio	2.13x	1.55x	32.0	536	2025-12-31
Growth and financing, sleeve percentile 31.7					
Revenue growth, three-year compound	9.3%	1.5%	16.9	479	2025-12-31
Free cash flow growth, three-year compound	not computable	8.2%			
current FCF must be positive and base FCF must exceed $100,000					
Reinvestment rate	67.4%	12.2%	24.6	265	2025-12-31
Asset growth, three years	16.7%	2.0%	7.7	484	2025-12-31
Net share issuance, one year	1.3%	(0.3%)	77.5	378	2026-02-24

Among 457 peers

consumer durables; 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
108	Carmax Inc. (KMX)	24.4	B	
109	GameStop Corp. (GME)	25.0	B	fortress balance sheet
110	GameStop Corp. (GME-WT)	25.0	B	fortress balance sheet
111	Superior Group OF Companies, Inc. (SGC)	25.2	B	
112	Autoliv Inc. (ALV)	25.2	B	
113	Standard Motor Products, Inc. (SMP)	25.4	B	
114	General Motors Co. (GM)	25.7	B	
115	Dillard'S, Inc. (DDS)	25.8	B	
116	Dillard'S, Inc. (DDT)	25.8	B	
117	Mission Produce, Inc. (AVO)	26.0	B	
118	MSC Industrial Direct Co. Inc. (MSM)	26.4	B	

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	(4.5%)	(0.1%)	44
Distance from 52-week high	(17.4%)	(24.6%)	63
EBIT to enterprise value	10.2%	4.9%	87
Free cash flow yield	2.2%	4.4%	33
Book value to price	0.86	0.43	72

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Sales to price	2.15	1.46	63
Composite equity issuance, five years	(17.0%)	(16.0%)	47
Relative strength against the sector, log excess return	(0.02)	(0.01)	49

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 7 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	pass
Current ratio improved	pass
No new shares issued	fail
Gross margin improved	pass
Asset turnover improved	fail
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	83 (10-Q received Aug 4, 2026)
Median daily dollar volume, 63 sessions	$5.1M

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	$559.4M	2025-12-31	2026-02-26	10-K	26-000012
2	assets	us-gaap:Assets	$2.0B	2025-12-31	2026-02-26	10-K	26-000012
3	operating income	us-gaap:OperatingIncomeLoss	$80.6M	2024-12-31	2026-02-26	10-K	26-000012
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$74.0M	2024-12-31	2026-02-26	10-K	26-000012
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$19.4M	2024-12-31	2026-02-26	10-K	26-000012
6	total debt	us-gaap:LongTermDebt	$562.3M	2024-12-31	2026-02-26	10-K	26-000012
7	book equity	us-gaap:StockholdersEquity	$615.7M	2024-12-31	2026-02-26	10-K	26-000012
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$44.4M	2024-12-31	2025-02-28	10-K	25-000012
9	total debt	us-gaap:LongTermDebt	$156.2M	2023-12-31	2025-02-28	10-K	25-000012
10	book equity	us-gaap:StockholdersEquity	$635.1M	2023-12-31	2025-02-28	10-K	25-000012
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$32.5M	2023-12-31	2025-02-28	10-K	25-000012
12	net income	us-gaap:NetIncomeLoss	$41.3M	2025-12-31	2026-02-26	10-K	26-000012
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$57.4M	2025-12-31	2026-02-26	10-K	26-000012
14	assets	us-gaap:Assets	$1.8B	2024-12-31	2026-02-26	10-K	26-000012
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.8B	2025-12-31	2026-02-26	10-K	26-000012
16	gross profit	us-gaap:GrossProfit	$423.3M	2024-12-31	2026-02-26	10-K	26-000012
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.5B	2024-12-31	2026-02-26	10-K	26-000012
18	gross profit	us-gaap:GrossProfit	$388.8M	2023-12-31	2026-02-26	10-K	26-000012
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.4B	2023-12-31	2026-02-26	10-K	26-000012
20	gross profit	us-gaap:GrossProfit	$382.5M	2022-12-31	2025-02-28	10-K	25-000012
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.4B	2022-12-31	2025-02-28	10-K	25-000012
22	gross profit	us-gaap:GrossProfit	$376.9M	2021-12-31	2024-02-22	10-K	24-008994
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.3B	2021-12-31	2024-02-22	10-K	24-008994
24	current assets	us-gaap:AssetsCurrent	$1.1B	2025-12-31	2026-02-26	10-K	26-000012
25	current liabilities	us-gaap:LiabilitiesCurrent	$493.3M	2025-12-31	2026-02-26	10-K	26-000012
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$589.4M	2025-12-31	2026-02-26	10-K	26-000012
27	operating income	us-gaap:OperatingIncomeLoss	$136.5M	2025-12-31	2026-02-26	10-K	26-000012

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28	book equity	us-gaap:StockholdersEquity	$683.7M	2025-12-31	2026-02-26	10-K	26-000012
29	liabilities	us-gaap:Liabilities	$1.3B	2025-12-31	2026-02-26	10-K	26-000012
30	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$31.4M	2024-12-31	2026-02-26	10-K	26-000012
31	operating income	us-gaap:OperatingIncomeLoss	$92.7M	2023-12-31	2026-02-26	10-K	26-000012
32	interest expense	us-gaap:InterestExpense	$13.3M	2023-12-31	2024-02-22	10-K	24-008994
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$38.7M	2025-12-31	2026-02-26	10-K	26-000012
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$76.7M	2024-12-31	2026-02-26	10-K	26-000012
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$44.0M	2024-12-31	2026-02-26	10-K	26-000012
36	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$144.3M	2023-12-31	2026-02-26	10-K	26-000012
37	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$28.6M	2023-12-31	2026-02-26	10-K	26-000012
38	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$27.5M	2022-12-31	2025-02-28	10-K	25-000012
39	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$26.0M	2022-12-31	2025-02-28	10-K	25-000012
40	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$43.8M	2025-12-31	2026-02-26	10-K	26-000012
41	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$110.5M	2025-12-31	2026-02-26	10-K	26-000012
42	income tax	us-gaap:IncomeTaxExpenseBenefit	$30.6M	2025-12-31	2026-02-26	10-K	26-000012
43	current assets	us-gaap:AssetsCurrent	$921.9M	2024-12-31	2026-02-26	10-K	26-000012
44	current liabilities	us-gaap:LiabilitiesCurrent	$436.5M	2024-12-31	2026-02-26	10-K	26-000012
45	assets	us-gaap:Assets	$1.3B	2023-12-31	2025-02-28	10-K	25-000012
46	assets	us-gaap:Assets	$1.3B	2022-12-31	2025-02-28	10-K	25-000012
47	shares outstanding	dei:EntityCommonStockSharesOutstanding	22,145,939	2026-02-24	2026-02-26	10-K	26-000012
48	shares outstanding	dei:EntityCommonStockSharesOutstanding	21,861,880	2025-02-25	2025-02-28	10-K	25-000012

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