Hackett Group, Inc.

HCKT

Nasdaq; other; SIC 8742, Services-Management Consulting Services; CIK 0001057379

A

strongest fifth of 335 graded peers in other

rank 32 of 335; percentile 9.3; sampling error 2.6 points; lower is stronger

A B C D E

A, the bull



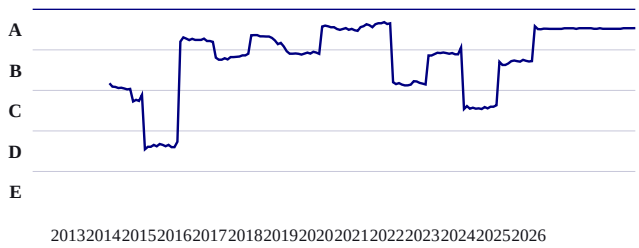
Scoreboard	
Profitability	B percentile 34.5
Solvency	B percentile 23.6
Growth and financing	B/C percentile 42.3
Reliability	0.87 AUC filers with $120M to $591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025
Peer failure rate	1.03% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$120M to $591M assets total assets $206.4M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered; fortress balance sheet not computable: distress
Inputs computable	11 of 14
Graded from	filings received through Feb 27, 2026 242 days before the rescan; latest periodic filing 10-Q received Aug 5, 2026
Last close	$12.21 2026-10-26; market equity $303.8M; 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 27, 2026

In this Annual Report on Form 10-K, unless the context otherwise requires, "The Hackett Group," "Hackett," the "Company," "we," "us," and "our" refer to The Hackett Group, Inc. and its subsidiaries and predecessors. We were originally incorporated on April 23, 1997. The Hackett Group, Inc. (NASDAQ: HCKT) is a global, IP platform-based generative artificial intelligence ("Gen AI") strategic advisory, business transformation, and enterprise application implementation firm.

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 34.5						
Gross profitability	56.8%	27.0%		12.9	287	2025-12-26
Return on invested capital	not computable	10.0%				
latest aligned inputs end 2018-12-28; latest annual assets end 2025-12-26						
Accruals ratio	(13.7%)	(5.8%)		18.5	503	2025-12-26

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Gross margin stability, five years	4.5 pts	2.2 pts	72.1	205	2025-12-26
Solvency, sleeve percentile 23.6						
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	3.64	2.05	24.5	385	2025-12-26
Net debt to EBITDA	not computable	2.52x			
latest aligned inputs end 2018-12-28; latest annual assets end 2025-12-26						
Interest coverage	13.71x	2.45x	12.6	88	2025-12-26
Current ratio	1.72x	1.33x	33.8	507	2025-12-26
Growth and financing, sleeve percentile 42.3						
Revenue growth, three-year compound	1.3%	5.1%	63.9	400	2025-12-26
Free cash flow growth, three-year compound	(15.8%)	8.8%	75.9	221	2025-12-26
Reinvestment rate	104.4%	11.6%	14.7	191	2025-12-26
Asset growth, three years	3.7%	4.2%	52.1	437	2025-12-26
Net share issuance, one year	(8.7%)	(0.5%)	4.8	353	2026-02-23

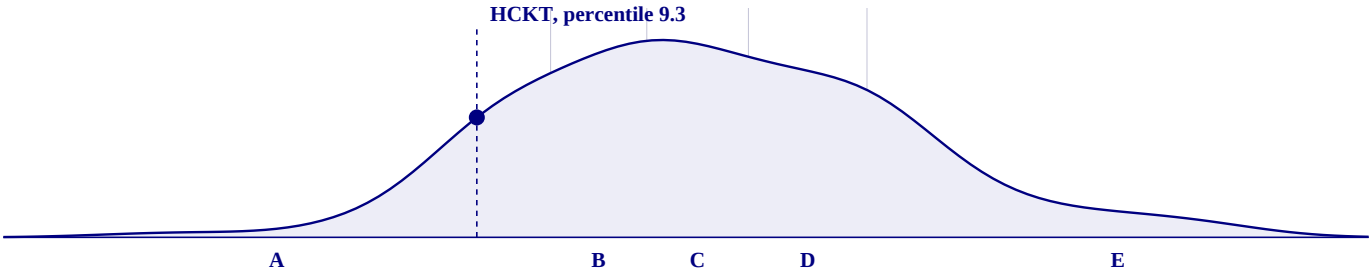
Warnings

1 of 7 checks triggered; none of them enters the letter

Check	Measured
Fortress balance sheet	cash minus debt is 7,308,000 USD; Altman Z is not used

Among 335 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
27	Moodys Corp. (MCO)	7.8	A	
28	Southern Copper (SCCO)	8.1	A	
29	Legacy Education Inc. (LGCY)	8.4	A	fortress balance sheet
30	Installed Building Products, Inc. (IBP)	8.7	A	
31	Cavco Industries, Inc. (CVCO)	9.0	A	
32	Hackett Group, Inc. (HCKT)	9.3	A	fortress balance sheet
33	Genpact Ltd. (G)	9.6	A	
34	Hecla Mining (HL)	10.0	A	
35	Hecla Mining (HL-PB)	10.0	A	
36	Mastech Digital, Inc. (MHH)	10.5	A	
37	Kforce Inc. (KFRC)	10.8	A	

What the price implies

at the 2026-10-26 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(40.1%)	2.0%	14
Distance from 52-week high	(40.6%)	(26.3%)	31
EBIT to enterprise value	8.1%	4.3%	80

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Free cash flow yield	10.7%	4.1%	85
Book value to price	0.22	0.34	36
Sales to price	1.01	0.71	61
Composite equity issuance, five years	(32.0%)	(8.9%)	12
Relative strength against the sector, log excess return	(0.66)	(0.13)	14

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 5 of 9, period end 2025-12-26	
Return on assets above zero	pass
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	pass
No new shares issued	pass
Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$14.2M
Operating cash flow, four quarters	$40.6M
Months of runway	not finite
Days since last periodic filing	83 (10-Q received Aug 5, 2026)
Median daily dollar volume, 63 sessions	$2.2M

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	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$305.6M	2025-12-26	2026-02-27	10-K	26-082863
2	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$188.5M	2025-12-26	2026-02-27	10-K	26-082863
3	assets	us-gaap:Assets	$206.4M	2025-12-26	2026-02-27	10-K	26-082863
4	operating income	us-gaap:OperatingIncomeLoss	$33.6M	2018-12-28	2021-03-12	10-K	21-012796
5	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$32.9M	2018-12-28	2021-03-12	10-K	21-012796
6	income tax	us-gaap:IncomeTaxExpenseBenefit	$5.6M	2018-12-28	2021-03-12	10-K	21-012796
7	total debt	us-gaap:LongTermDebt	$6.5M	2018-12-28	2020-03-05	10-K	20-008982
8	book equity	us-gaap:StockholdersEquity	$123.6M	2018-12-28	2022-03-04	10-K	22-008703
9	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$13.8M	2018-12-28	2020-03-05	10-K	20-008982
10	total debt	us-gaap:LongTermDebt	$19.0M	2017-12-29	2019-03-08	10-K	19-007043
11	book equity	us-gaap:StockholdersEquity	$107.3M	2017-12-29	2021-03-12	10-K	21-012796
12	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$17.5M	2017-12-29	2019-03-08	10-K	19-007043
13	net income	us-gaap:NetIncomeLoss	$12.9M	2025-12-26	2026-02-27	10-K	26-082863
14	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$40.3M	2025-12-26	2026-02-27	10-K	26-082863
15	assets	us-gaap:Assets	$193.3M	2024-12-27	2026-02-27	10-K	26-082863
16	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$313.9M	2024-12-27	2026-02-27	10-K	26-082863
17	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$190.6M	2024-12-27	2026-02-27	10-K	26-082863
18	gross profit	us-gaap:GrossProfit	$84.4M	2023-12-29	2024-03-01	10-K	24-023702
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$296.6M	2023-12-29	2026-02-27	10-K	26-082863
20	gross profit	us-gaap:GrossProfit	$89.5M	2022-12-30	2024-03-01	10-K	24-023702
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$293.7M	2022-12-30	2025-02-28	10-K	25-030037
22	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$278.8M	2021-12-31	2024-03-01	10-K	24-023702
23	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$173.1M	2021-12-31	2024-03-01	10-K	24-023702
24	current assets	us-gaap:AssetsCurrent	$83.9M	2025-12-26	2026-02-27	10-K	26-082863
25	current liabilities	us-gaap:LiabilitiesCurrent	$48.8M	2025-12-26	2026-02-27	10-K	26-082863

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26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$78.4M	2025-12-26	2026-02-27	10-K	26-082863
27	operating income	us-gaap:OperatingIncomeLoss	$23.5M	2025-12-26	2026-02-27	10-K	26-082863
28	book equity	us-gaap:StockholdersEquity	$68.1M	2025-12-26	2026-02-27	10-K	26-082863
29	liabilities	us-gaap:Liabilities	$138.3M	2025-12-26	2026-02-27	10-K	26-082863
30	depreciation amortization	us-gaap:Depreciation	$2.5M	2018-12-28	2021-03-12	10-K	21-012796
31	interest expense	us-gaap:InterestExpense	$1.7M	2025-12-26	2026-02-27	10-K	26-082863
32	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$7.9M	2025-12-26	2026-02-27	10-K	26-082863
33	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$47.7M	2024-12-27	2026-02-27	10-K	26-082863
34	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$4.1M	2024-12-27	2026-02-27	10-K	26-082863
35	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$37.4M	2023-12-29	2026-02-27	10-K	26-082863
36	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$4.1M	2023-12-29	2026-02-27	10-K	26-082863
37	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$58.9M	2022-12-30	2025-02-28	10-K	25-030037
38	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$4.7M	2022-12-30	2025-02-28	10-K	25-030037
39	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$5.2M	2025-12-26	2026-02-27	10-K	26-082863
40	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$21.8M	2025-12-26	2026-02-27	10-K	26-082863
41	income tax	us-gaap:IncomeTaxExpenseBenefit	$8.9M	2025-12-26	2026-02-27	10-K	26-082863
42	current assets	us-gaap:AssetsCurrent	$76.3M	2024-12-27	2026-02-27	10-K	26-082863
43	current liabilities	us-gaap:LiabilitiesCurrent	$53.1M	2024-12-27	2026-02-27	10-K	26-082863
44	assets	us-gaap:Assets	$181.4M	2023-12-29	2025-02-28	10-K	25-030037
45	assets	us-gaap:Assets	$185.0M	2022-12-30	2024-03-01	10-K	24-023702
46	shares outstanding	dei:EntityCommonStockSharesOutstanding	25,380,429	2026-02-23	2026-02-27	10-K	26-082863
47	shares outstanding	dei:EntityCommonStockSharesOutstanding	27,791,221	2025-02-24	2025-02-28	10-K	25-030037

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