Huron Consulting Group Inc. HURN

Nasdaq; other; SIC 8742, Services-Management Consulting Services; CIK 0001289848

B/C

on the B/C boundary of 335 graded peers in other

rank 143 of 335; percentile 42.5; sampling error 2.6 points; lower is stronger

A B C D E

B/C, the elk



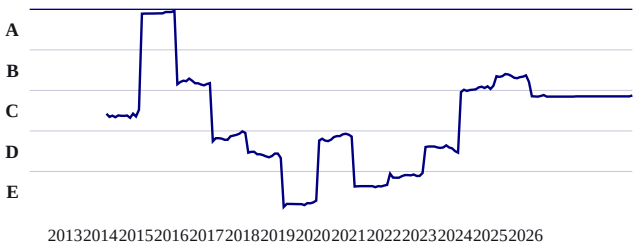
Scoreboard	
Profitability	C percentile 47.6
Solvency	C percentile 55.7
Growth and financing	B percentile 30.9
Reliability	0.91 AUC filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025
Peer failure rate	1.01% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$591M to $2.67B assets total assets $1.5B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress
Inputs computable	7 of 14
Graded from	filings received through Feb 24, 2026 245 days before the rescan; latest periodic filing 10-Q received Jul 28, 2026
Last close	$198.65 2026-10-26; market equity $3.2B; 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 24, 2026

Huron is a global professional services firm that partners with clients to put possible into practice by creating sound strategies, optimizing operations, accelerating digital transformation, and empowering businesses to own their future. By embracing diverse perspectives, encouraging new ideas and challenging the status quo, we create sustainable results for the organizations we serve. We are headquartered in Chicago, Illinois, with additional locations in the United States and abroad in Canada, France, India, Poland, Singapore, Switzerland and the United Kingdom.

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 47.6						
Gross profitability	not computable	27.0%				
latest aligned inputs end 2021-12-31; latest annual assets end 2025-12-31						
Return on invested capital	not computable	10.0%				

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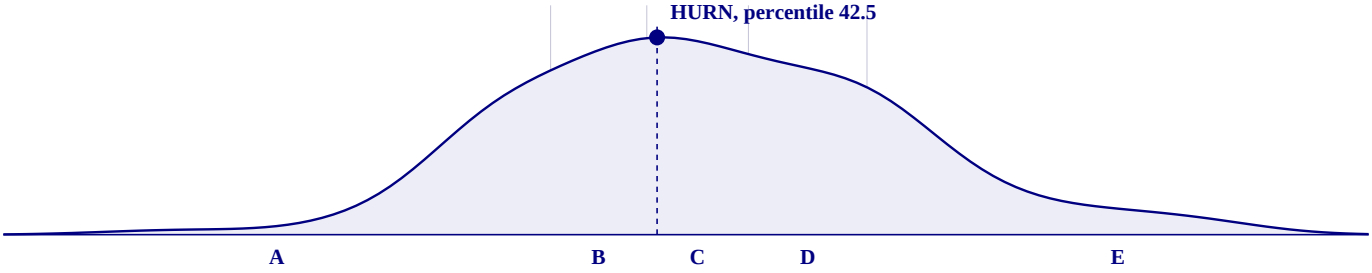
latest aligned inputs end 2022-12-31; latest annual assets end 2025-12-31						
Accruals ratio	(6.2%)	(5.8%)		47.6	503	2025-12-31
Gross margin stability, five years	not computable	2.2 pts				
latest aligned inputs end 2021-12-31; latest annual assets end 2025-12-31						
Solvency, sleeve percentile 55.7						
Twelve-month failure probability	not computable	0.04%				
liabilities and a nearby cover-page share count are required at 2026-03-31						
Altman Z double-prime	not computable	2.05				
one or more required annual facts are missing						
Net debt to EBITDA	not computable	2.52x				
latest aligned inputs end 2022-12-31; latest annual assets end 2025-12-31						
Interest coverage	not computable	2.45x				
one or more required annual facts are missing						
Current ratio	1.17x	1.33x		55.7	507	2025-12-31
Growth and financing, sleeve percentile 30.9						
Revenue growth, three-year compound	13.6%	5.1%		22.6	400	2025-12-31
Free cash flow growth, three-year compound	35.9%	8.8%		16.8	221	2025-12-31
Reinvestment rate	(19.5%)	11.6%		65.3	191	2025-12-31
Asset growth, three years	8.4%	4.2%		31.9	437	2025-12-31
Net share issuance, one year	(4.3%)	(0.5%)		18.2	353	2026-02-17

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
138	Fluor Corp. (FLR)	41.0	B/C	
139	Waste Management Inc. (WM)	41.3	B/C	
140	Energy Services of America Corp. (ESOA)	41.6	B/C	late filer
141	Bristow Group Inc. (VTOL)	41.9	B/C	
142	Graham Holdings Co. (GHC)	42.2	B/C	
143	Huron Consulting Group Inc. (HURN)	42.5	B/C	
144	Martin Marietta Materials Inc. (MLM)	42.8	C	
145	NPK International Inc. (NPKI)	43.1	C	
146	V2X, Inc. (VVX)	43.4	C	
147	TSS, Inc. (TSSI)	43.7	C	late filer, fortress balance sheet
148	Werner Enterprises Inc. (WERN)	44.0	C	

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	8.9%	2.0%	55
Distance from 52-week high	0.0%	(26.3%)	97
EBIT to enterprise value	5.1%	4.3%	60

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Free cash flow yield	5.7%	4.1%	62
Book value to price	0.12	0.34	22
Sales to price	0.53	0.71	40
Composite equity issuance, five years	(34.0%)	(8.9%)	11
Relative strength against the sector, log excess return	(0.06)	(0.13)	55

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	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	fail
No new shares issued	pass
Gross margin improved	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$26.5M
Operating cash flow, four quarters	$138.1M
Months of runway	not finite
Days since last periodic filing	91 (10-Q received Jul 28, 2026)
Median daily dollar volume, 63 sessions	$34.4M

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	$927.0M	2021-12-31	2024-02-27	10-K	24-000036
2	cost of revenue	us-gaap:CostOfRevenue	$661.9M	2021-12-31	2022-02-24	10-K	22-000008
3	assets	us-gaap:Assets	$1.1B	2021-12-31	2023-02-28	10-K	23-000010
4	operating income	us-gaap:OperatingIncomeLoss	$99.8M	2022-12-31	2025-02-25	10-K	25-000032
5	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$108.6M	2022-12-31	2025-02-25	10-K	25-000032
6	income tax	us-gaap:IncomeTaxExpenseBenefit	$33.0M	2022-12-31	2025-02-25	10-K	25-000032
7	total debt	us-gaap:LongTermDebt	$290.0M	2022-12-31	2023-02-28	10-K	23-000010
8	book equity	us-gaap:StockholdersEquity	$552.0M	2022-12-31	2026-02-24	10-K	26-011093
9	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$11.8M	2022-12-31	2024-02-27	10-K	24-000036
10	total debt	us-gaap:LongTermDebt	$232.8M	2021-12-31	2023-02-28	10-K	23-000010
11	book equity	us-gaap:StockholdersEquity	$571.9M	2021-12-31	2025-02-25	10-K	25-000032
12	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$20.8M	2021-12-31	2023-02-28	10-K	23-000010
13	net income	us-gaap:NetIncomeLoss	$105.0M	2025-12-31	2026-02-24	10-K	26-011093
14	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$193.4M	2025-12-31	2026-02-24	10-K	26-011093
15	assets	us-gaap:Assets	$1.5B	2025-12-31	2026-02-24	10-K	26-011093
16	assets	us-gaap:Assets	$1.3B	2024-12-31	2026-02-24	10-K	26-011093
17	revenue	us-gaap:Revenues	$871.0M	2020-12-31	2023-02-28	10-K	23-000010
18	cost of revenue	us-gaap:CostOfRevenue	$624.7M	2020-12-31	2022-02-24	10-K	22-000008
19	revenue	us-gaap:Revenues	$965.5M	2019-12-31	2022-02-24	10-K	22-000008
20	cost of revenue	us-gaap:CostOfRevenue	$669.7M	2019-12-31	2022-02-24	10-K	22-000008
21	revenue	us-gaap:Revenues	$878.0M	2018-12-31	2021-02-23	10-K	21-000009
22	cost of revenue	us-gaap:CostOfRevenue	$608.7M	2018-12-31	2021-02-23	10-K	21-000009
23	revenue	us-gaap:Revenues	$807.7M	2017-12-31	2020-02-26	10-K	20-000006
24	cost of revenue	us-gaap:CostOfRevenue	$541.2M	2017-12-31	2020-02-26	10-K	20-000006
25	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$27.4M	2022-12-31	2025-02-25	10-K	25-000032

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26	current assets	us-gaap:AssetsCurrent	$448.6M	2025-12-31	2026-02-24	10-K	26-011093
27	current liabilities	us-gaap:LiabilitiesCurrent	$383.4M	2025-12-31	2026-02-24	10-K	26-011093
28	revenue	us-gaap:Revenues	$1.7B	2025-12-31	2026-02-24	10-K	26-011093
29	revenue	us-gaap:Revenues	$1.5B	2024-12-31	2026-02-24	10-K	26-011093
30	revenue	us-gaap:Revenues	$1.4B	2023-12-31	2026-02-24	10-K	26-011093
31	revenue	us-gaap:Revenues	$1.2B	2022-12-31	2025-02-25	10-K	25-000032
32	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$10.4M	2025-12-31	2026-02-24	10-K	26-011093
33	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$201.3M	2024-12-31	2026-02-24	10-K	26-011093
34	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$8.7M	2024-12-31	2026-02-24	10-K	26-011093
35	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$135.3M	2023-12-31	2026-02-24	10-K	26-011093
36	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$9.4M	2023-12-31	2026-02-24	10-K	26-011093
37	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$85.4M	2022-12-31	2025-02-25	10-K	25-000032
38	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$12.5M	2022-12-31	2025-02-25	10-K	25-000032
39	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$32.4M	2025-12-31	2026-02-24	10-K	26-011093
40	operating income	us-gaap:OperatingIncomeLoss	$178.6M	2025-12-31	2026-02-24	10-K	26-011093
41	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$135.1M	2025-12-31	2026-02-24	10-K	26-011093
42	income tax	us-gaap:IncomeTaxExpenseBenefit	$30.0M	2025-12-31	2026-02-24	10-K	26-011093
43	current assets	us-gaap:AssetsCurrent	$409.1M	2024-12-31	2026-02-24	10-K	26-011093
44	current liabilities	us-gaap:LiabilitiesCurrent	$338.8M	2024-12-31	2026-02-24	10-K	26-011093
45	assets	us-gaap:Assets	$1.3B	2023-12-31	2025-02-25	10-K	25-000032
46	assets	us-gaap:Assets	$1.2B	2022-12-31	2024-02-27	10-K	24-000036
47	shares outstanding	dei:EntityCommonStockSharesOutstanding	16,922,924	2026-02-17	2026-02-24	10-K	26-011093
48	shares outstanding	dei:EntityCommonStockSharesOutstanding	17,677,584	2025-02-18	2025-02-25	10-K	25-000032

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