Macom Technology Solutions Holdings, Inc. MTSI

Nasdaq; business equipment; SIC 3674, Semiconductors & Related Devices; CIK 0001493594

B

second fifth of 496 graded peers in business equipment

rank 148 of 496; percentile 29.7; sampling error 2.2 points; lower is stronger

A B C D E

B, the elk



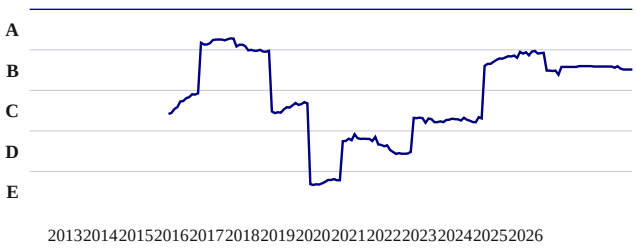
Scoreboard	
Profitability	C percentile 45.3
Solvency	B percentile 33.9
Growth and financing	C percentile 48.3
Reliability	0.91 AUC filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025
Peer failure rate	1.01% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$591M to $2.67B assets total assets $2.1B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: fortress balance sheet
Inputs computable	10 of 14
Graded from	filings received through Nov 14, 2025 347 days before the rescan; latest periodic filing 10-Q received Aug 6, 2026
Last close	$243.43 2026-10-26; market equity $18.6B; 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 Nov 14, 2025

We design, develop and manufacture differentiated semiconductor products and solutions for the Industrial and Defense ("I&D"), Data Center and Telecommunications ("Telecom") industries for customers who demand high performance, quality and reliability. We are headquartered in Lowell, Massachusetts, with operational facilities throughout North America, Europe and Asia. We have more than 70 years of application expertise, combined with expertise in analog and mixed signal circuit design, compound semiconductor fabrication (including gallium arsenide (GaAs), gallium nitride (GaN), indium phosphide (InP) and specialized silicon), advanced packaging and back-end assembly and test.

The fourteen inputs

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

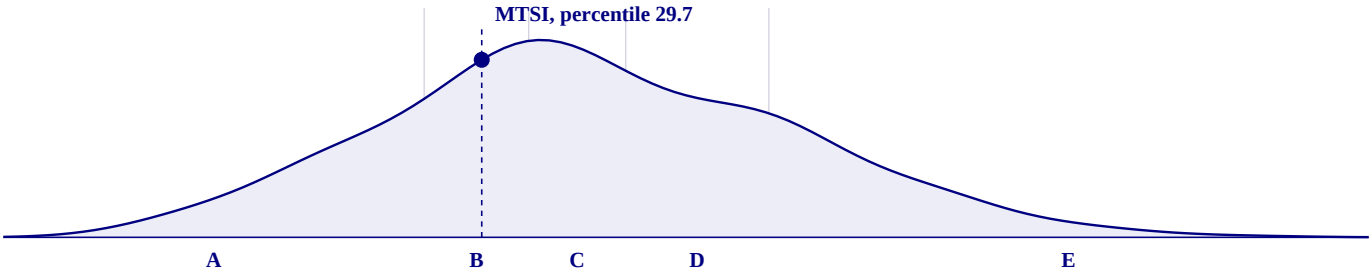
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 45.3						
Gross profitability	25.2%	28.6%		54.5	555	2025-10-03
Return on invested capital	not computable	11.2%				

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one or more required annual facts are missing					
Accruals ratio	(15.0%)	(7.3%)	27.9	618	2025-10-03
Gross margin stability, five years	2.5 pts	2.3 pts	53.4	426	2025-10-03
Solvency, sleeve percentile 33.9					
Twelve-month failure probability	0.05%	0.05%	50.0	101	2026-07-03
Altman Z double-prime	4.58	2.15	26.4	565	2025-10-03
Net debt to EBITDA	not computable	1.11x			
one or more required annual facts are missing					
Interest coverage	not computable	3.77x			
latest aligned inputs end 2024-09-27; latest annual assets end 2025-10-03					
Current ratio	3.71x	2.01x	25.3	662	2025-10-03
Growth and financing, sleeve percentile 48.3					
Revenue growth, three-year compound	12.7%	6.4%	32.2	535	2025-10-03
Free cash flow growth, three-year compound	8.6%	18.1%	60.5	264	2025-10-03
Reinvestment rate	not computable	14.3%			
pretax income must exceed the validity floor and imply a 0%-100% tax rate					
Asset growth, three years	10.2%	5.1%	33.5	560	2025-10-03
Net share issuance, one year	3.5%	0.5%	66.9	409	2025-11-11

Among 496 peers

business equipment; 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
143	Ceva Inc. (CEVA)	28.7	B	
144	Data Storage Corp. (DTST)	28.9	B	short runway, late filer, fortress balance sheet
145	PTC Inc. (PTC)	29.1	B	
146	Lightpath Technologies Inc. (LPTH)	29.3	B	dilution, late filer, fortress balance sheet
147	Ultralife Corp. (ULBI)	29.5	B	late filer
148	Macom Technology Solutions Holdings, Inc. (MTSI)	29.7	B	
149	EnerSys (ENS)	29.9	B	
150	First Solar, Inc. (FSLR)	30.1	B	fortress balance sheet
151	Block, Inc. (XYZ)	30.3	B	
152	Leonardo DRS, Inc. (DRS)	30.5	B	fortress balance sheet
153	CTS Corp. (CTS)	30.7	B	fortress balance sheet

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	111.9%	2.2%	93
Distance from 52-week high	(40.5%)	(31.2%)	41
EBIT to enterprise value	0.7%	1.5%	43

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Free cash flow yield	1.0%	2.8%	32
Book value to price	0.08	0.26	21
Sales to price	0.05	0.32	8
Composite equity issuance, five years	11.7%	4.2%	60
Relative strength against the sector, log excess return	0.47	(0.26)	93

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 5 of 9, period end 2025-10-03	
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	pass
Current ratio improved	fail
No new shares issued	fail
Gross margin improved	pass
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$89.6M
Operating cash flow, four quarters	$271.2M
Months of runway	not finite
Days since last periodic filing	82 (10-Q received Aug 6, 2026)
Median daily dollar volume, 63 sessions	$367.8M

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	$529.0M	2025-10-03	2025-11-14	10-K	25-000054
2	assets	us-gaap:Assets	$2.1B	2025-10-03	2025-11-14	10-K	25-000054
3	net income	us-gaap:NetIncomeLoss	-$54.2M	2025-10-03	2025-11-14	10-K	25-000054
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$235.4M	2025-10-03	2025-11-14	10-K	25-000054
5	assets	us-gaap:Assets	$1.8B	2024-09-27	2025-11-14	10-K	25-000054
6	revenue	us-gaap:Revenues	$967.3M	2025-10-03	2025-11-14	10-K	25-000054
7	gross profit	us-gaap:GrossProfit	$393.8M	2024-09-27	2025-11-14	10-K	25-000054
8	revenue	us-gaap:Revenues	$729.6M	2024-09-27	2025-11-14	10-K	25-000054
9	gross profit	us-gaap:GrossProfit	$385.8M	2023-09-29	2025-11-14	10-K	25-000054
10	revenue	us-gaap:Revenues	$648.4M	2023-09-29	2025-11-14	10-K	25-000054
11	gross profit	us-gaap:GrossProfit	$406.2M	2022-09-30	2024-11-12	10-K	24-000060
12	revenue	us-gaap:Revenues	$675.2M	2022-09-30	2024-11-12	10-K	24-000060
13	gross profit	us-gaap:GrossProfit	$341.9M	2021-10-01	2023-11-13	10-K	23-000081
14	revenue	us-gaap:Revenues	$606.9M	2021-10-01	2023-11-13	10-K	23-000081
15	current assets	us-gaap:AssetsCurrent	$1.2B	2025-10-03	2025-11-14	10-K	25-000054
16	current liabilities	us-gaap:LiabilitiesCurrent	$325.1M	2025-10-03	2025-11-14	10-K	25-000054
17	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$240.1M	2025-10-03	2025-11-14	10-K	25-000054
18	operating income	us-gaap:OperatingIncomeLoss	$129.7M	2025-10-03	2025-11-14	10-K	25-000054
19	book equity	us-gaap:StockholdersEquity	$1.3B	2025-10-03	2025-11-14	10-K	25-000054
20	liabilities	us-gaap:Liabilities	$776.3M	2025-10-03	2025-11-14	10-K	25-000054
21	operating income	us-gaap:OperatingIncomeLoss	$73.7M	2024-09-27	2025-11-14	10-K	25-000054
22	interest expense	us-gaap:InterestExpense	$5.1M	2024-09-27	2024-11-12	10-K	24-000060
23	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$42.6M	2025-10-03	2025-11-14	10-K	25-000054
24	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$162.6M	2024-09-27	2025-11-14	10-K	25-000054
25	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$22.4M	2024-09-27	2025-11-14	10-K	25-000054

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26	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$166.9M	2023-09-29	2025-11-14	10-K	25-000054
27	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$24.7M	2023-09-29	2025-11-14	10-K	25-000054
28	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$177.0M	2022-09-30	2024-11-12	10-K	24-000060
29	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$26.5M	2022-09-30	2024-11-12	10-K	24-000060
30	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$63.3M	2025-10-03	2025-11-14	10-K	25-000054
31	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$29.0M	2025-10-03	2025-11-14	10-K	25-000054
32	income tax	us-gaap:IncomeTaxExpenseBenefit	$25.2M	2025-10-03	2025-11-14	10-K	25-000054
33	current assets	us-gaap:AssetsCurrent	$903.1M	2024-09-27	2025-11-14	10-K	25-000054
34	current liabilities	us-gaap:LiabilitiesCurrent	$108.2M	2024-09-27	2025-11-14	10-K	25-000054
35	assets	us-gaap:Assets	$1.6B	2023-09-29	2024-11-12	10-K	24-000060
36	assets	us-gaap:Assets	$1.6B	2022-09-30	2023-11-13	10-K	23-000081
37	shares outstanding	dei:EntityCommonStockSharesOutstanding	74,932,978	2025-11-11	2025-11-14	10-K	25-000054
38	shares outstanding	dei:EntityCommonStockSharesOutstanding	72,399,645	2024-11-06	2024-11-12	10-K	24-000060

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