Resources Connection, Inc.

RGP

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

C

middle fifth of 335 graded peers in other

rank 167 of 335; percentile 49.7; sampling error 2.6 points; lower is stronger

A B C D E

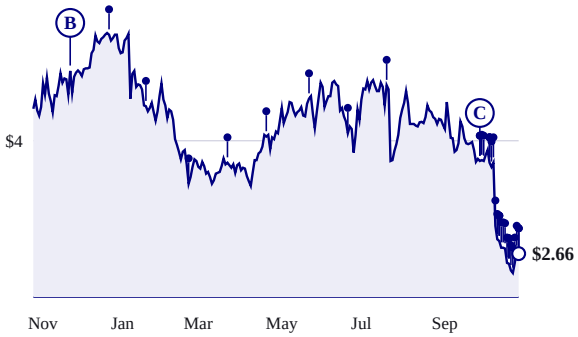
C, the tortoise



Scoreboard

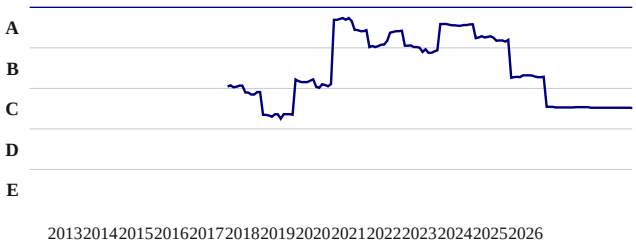
Profitability	A percentile 16.1
Solvency	B percentile 34.1
Growth and financing	E percentile 91.6
Reliability	0.87 AUC filers with $120M to $591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025
Peer failure rate	1.03% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$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 95 days before the rescan; latest periodic filing 10-Q received Oct 7, 2026
Last close	$2.66 2026-10-26; market equity $92.3M; 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 16.1						
Gross profitability	65.9%	27.0%		9.4	287	2026-05-30
Return on invested capital	not computable	10.0%				

one or more required annual facts are missing

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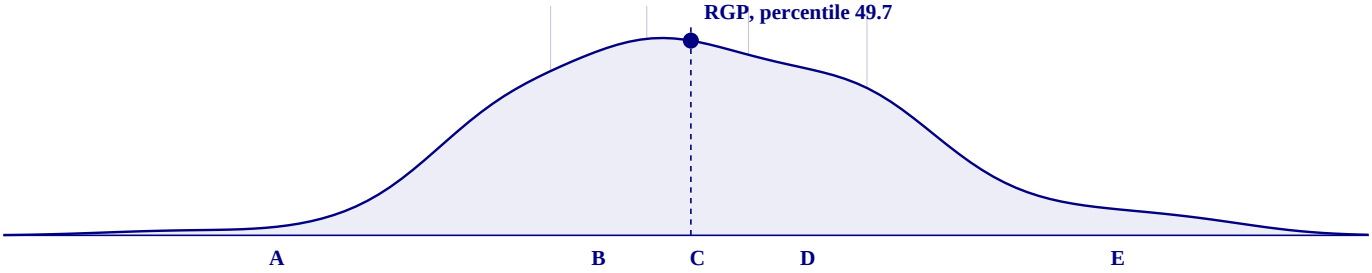
Accruals ratio	(15.0%)	(5.8%)	16.9	503	2026-05-30
Gross margin stability, five years	1.1 pts	2.2 pts	22.1	205	2026-05-30
Solvency, sleeve percentile 34.1					
Twelve-month failure probability	not computable	0.04%			
latest liabilities, cash plus short-term investments, book equity, and shares are required					
Altman Z double-prime	1.43	2.05	48.4	385	2026-05-30
Net debt to EBITDA	not computable	2.52x			
one or more required annual facts are missing					
Interest coverage	not computable	2.45x			
latest aligned inputs end 2023-05-27; latest annual assets end 2026-05-30					
Current ratio	2.51x	1.33x	19.8	507	2026-05-30
Growth and financing, sleeve percentile 91.6					
Revenue growth, three-year compound	(16.5%)	5.1%	93.7	400	2026-05-30
Free cash flow growth, three-year compound	(80.2%)	8.8%	100.0	221	2026-05-30
Reinvestment rate	not computable	11.6%			
pretax income must exceed the validity floor and imply a 0%-100% tax rate					
Asset growth, three years	(21.5%)	4.2%	96.6	437	2026-05-30
Net share issuance, one year	3.3%	(0.5%)	76.1	353	2026-07-15

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
162	Orion Group Holdings Inc. (ORN)	48.2	C	fortress balance sheet
163	RB Global Inc. (RBA)	48.5	C	
164	Jacobs Solutions Inc. (J)	48.8	C	
165	XPO, Inc. (XPO)	49.1	C	
166	Smart Sand, Inc. (SND)	49.4	C	fortress balance sheet
167	Resources Connection, Inc. (RGP)	49.7	C	
168	Mistras Group, Inc. (MG)	50.0	C	
169	APi Group Corp. (APG)	50.3	C	
170	Casella Waste Systems Inc. (CWST)	50.6	C	
171	Covenant Logistics Group, Inc. (CVLG)	50.9	C	
172	MGM Resorts International (MGM)	51.2	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	(14.2%)	2.0%	35
Distance from 52-week high	(49.6%)	(26.3%)	22
EBIT to enterprise value	not computable	4.3%	
Free cash flow yield	0.7%	4.1%	26
Book value to price	1.75	0.34	95

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Sales to price	4.90	0.71	92
Composite equity issuance, five years	(17.7%)	(8.9%)	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	20 (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

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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

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