# Standard Motor Products, Inc. SMP

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

**B**

**second fifth of 458 graded peers in the pooled consumer group**

rank 112 of 458; percentile 25.2; sampling error 2.3 points; lower is stronger

A B C D E

**B, the elk**



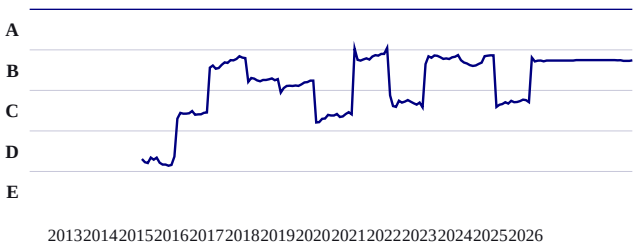
| Scoreboard | |
|---|---|
| **Profitability** | C/D<br>percentile 57.8 |
| **Solvency** | B<br>percentile 31.9 |
| **Growth and financing** | B<br>percentile 31.8 |
| **Reliability** | 0.91 AUC<br>filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025 |
| **Peer failure rate** | 1.01% a year<br>Item 1.03 bankruptcies, same asset band, 2012 to 2025 |
| **Size band** | $591M to $2.67B assets<br>total assets $2.0B |
| **Standard universe** | inside<br>revenue above $1M and assets above $10M |
| **Warnings** | none triggered<br>not computable: short runway, distress |
| **Inputs computable** | 9 of 14 |
| **Graded from** | filings received through Feb 26, 2026<br>243 days before the rescan; latest periodic filing 10-Q received Aug 4, 2026 |
| **Last close** | $37.30<br>2026-10-26; market equity $833.3M; 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 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 57.8** | | | | | | |
| Gross profitability | 28.0% | 34.4% | | 57.5 | 472 | 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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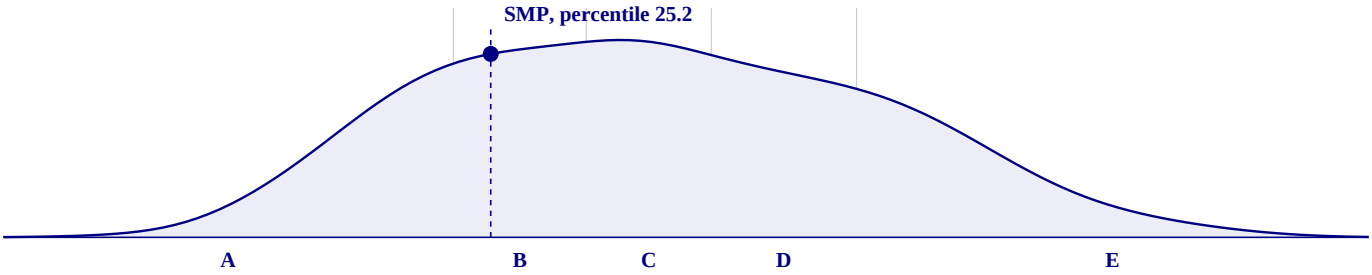
| | | | | | |
|---|---|---|---|---|---|
| Accruals ratio | (0.8%) | (5.1%) | 84.4 | 519 | 2025-12-31 |
| Gross margin stability, five years | 1.1 pts | 1.7 pts | 31.6 | 406 | 2025-12-31 |
| **Solvency, sleeve percentile 31.9** | | | | | |
| Twelve-month failure probability | not computable | 0.04% | | | |
| *latest liabilities, cash plus short-term investments, book equity, and shares are required* | | | | | |
| Altman Z double-prime | 3.81 | 2.13 | 31.6 | 396 | 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 | 2.64x | | | |
| *latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31* | | | | | |
| Current ratio | 2.13x | 1.56x | 32.2 | 535 | 2025-12-31 |
| **Growth and financing, sleeve percentile 31.8** | | | | | |
| Revenue growth, three-year compound | 9.3% | 1.4% | 17.1 | 480 | 2025-12-31 |
| Free cash flow growth, three-year compound | not computable | 7.8% | | | |
| *current FCF must be positive and base FCF must exceed $100,000* | | | | | |
| Reinvestment rate | 67.4% | 12.2% | 24.8 | 267 | 2025-12-31 |
| Asset growth, three years | 16.7% | 2.0% | 7.6 | 485 | 2025-12-31 |
| Net share issuance, one year | 1.3% | (0.3%) | 77.5 | 378 | 2026-02-24 |

## Among 458 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 |
|---|---|---|---|---|
| 107 | Carmax Inc. (KMX) | 24.3 | B | |
| 108 | Tapestry, Inc. (TPR) | 24.4 | B | |
| 109 | GameStop Corp. (GME) | 24.9 | B | fortress balance sheet |
| 110 | GameStop Corp. (GME-WT) | 24.9 | B | fortress balance sheet |
| 111 | Autoliv Inc. (ALV) | 24.9 | B | |
| 112 | Standard Motor Products, Inc. (SMP) | 25.2 | B | |
| 113 | Pepsico Inc. (PEP) | 25.2 | B | |
| 114 | Dillard'S, Inc. (DDS) | 25.7 | B | |
| 115 | Dillard'S, Inc. (DDT) | 25.7 | B | |
| 116 | Vital Farms, Inc. (VITL) | 26.0 | B | |
| 117 | General Motors Co. (GM) | 26.0 | B | |

## 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 | (4.5%) | (0.1%) | 44 |
| Distance from 52-week high | (17.4%) | (24.3%) | 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 | 0.44 | 71 |

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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 | 84 (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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