Korn Ferry

KFY

NYSE; other; SIC 7361, Services-Employment Agencies; CIK 0000056679

B

second fifth of 335 graded peers in other

rank 118 of 335; percentile 35.0; sampling error 2.6 points; lower is stronger

A B C D E

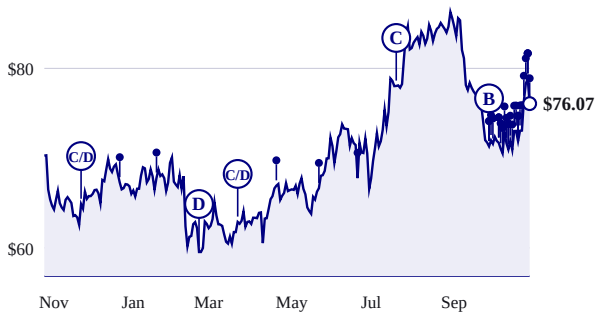
B, the elk



Scoreboard

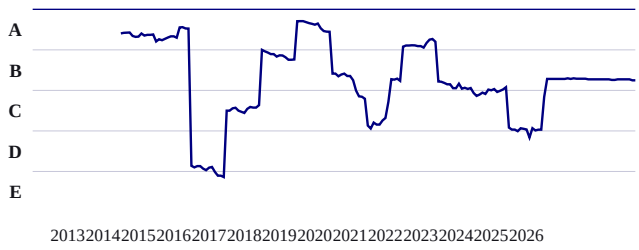
Profitability	D percentile 67.3
Solvency	A percentile 16.9
Growth and financing	C percentile 47.0
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $4.1B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered; fortress balance sheet
Inputs computable	9 of 14
Graded from	filings received through Jun 26, 2026 124 days before the rescan; latest periodic filing 10-Q received Sep 9, 2026
Last close	$76.10 2026-10-27; market equity $4.2B; 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 Jun 26, 2026

Korn Ferry (referred to herein as the "Company" or in the first-person notations "we," "our" and "us") is a global consulting firm that powers individual and business performance. The impact we create spans entire organizations, but it always starts with people. In every market and every technology shift, strategy sets direction, but people make it happen. They lead, adapt, innovate and execute the work that moves organizations forward. For more than 50 years, Korn Ferry has studied how people and organizations perform.

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 67.3						
Gross profitability	not computable	27.0%				
one or more required annual facts are missing						
Return on invested capital	not computable	10.0%				
latest aligned inputs end 2015-04-30; latest annual assets end 2026-04-30						

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Accruals ratio	(3.5%)	(5.8%)	67.3	503	2026-04-30
Gross margin stability, five years	not computable	2.2 pts			
five annual gross margins are required; found 0					
Solvency, sleeve percentile 16.9					
Twelve-month failure probability	0.02%	0.04%	4.5	45	2026-07-31
Altman Z double-prime	4.52	2.05	17.4	385	2026-04-30
Net debt to EBITDA	not computable	2.52x			
latest aligned inputs end 2015-04-30; latest annual assets end 2026-04-30					
Interest coverage	not computable	2.45x			
latest aligned inputs end 2014-04-30; latest annual assets end 2026-04-30					
Current ratio	1.94x	1.33x	28.7	507	2026-04-30
Growth and financing, sleeve percentile 47.0					
Revenue growth, three-year compound	0.9%	5.1%	64.7	400	2026-04-30
Free cash flow growth, three-year compound	5.8%	8.8%	54.5	221	2026-04-30
Reinvestment rate	44.5%	11.6%	35.3	191	2026-04-30
Asset growth, three years	4.4%	4.2%	47.9	437	2026-04-30
Net share issuance, one year	(2.0%)	(0.5%)	32.7	353	2026-06-18

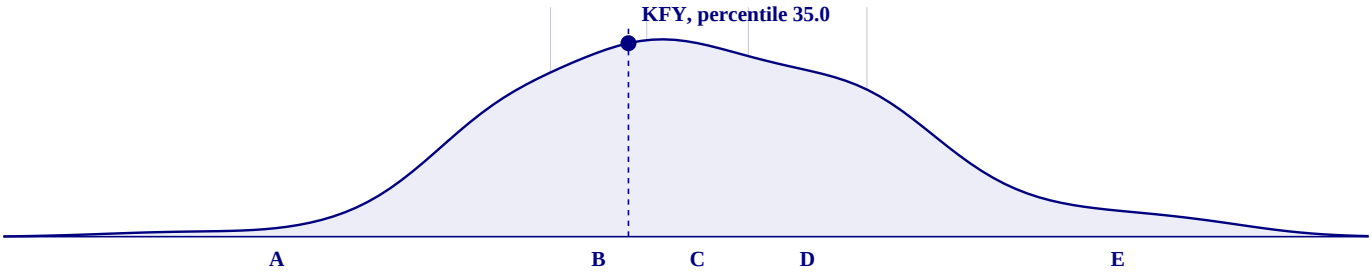
Warnings

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

Check	Measured
Fortress balance sheet	cash minus debt is 380,838,000 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
113	Limbach Holdings, Inc. (LMB)	33.5	B	
114	Fedex Corp. (FDX)	33.8	B	
115	Xometry, Inc. (XMTR)	34.1	B	
116	Netflix Inc. (NFLX)	34.4	B	
117	Astrana Health, Inc. (ASTH)	34.7	B	late filer
118	Korn Ferry (KFY)	35.0	B	fortress balance sheet
119	United Rentals, Inc. (URI)	35.3	B	
120	Evolent Health, Inc. (EVH)	35.6	B	
121	Bgsf, Inc. (BGSF)	35.9	B	late filer
122	Sterling Infrastructure, Inc. (STRL)	36.2	B	
123	Energy Fuels Inc. (UUUU)	36.5	B	

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What the price implies

at the 2026-10-27 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	24.3%	2.0%	69
Distance from 52-week high	(11.8%)	(25.4%)	72
EBIT to enterprise value	11.2%	4.3%	93
Free cash flow yield	7.8%	4.1%	76
Book value to price	0.48	0.34	66
Sales to price	0.71	0.71	49
Composite equity issuance, five years	(8.6%)	(8.9%)	51
Relative strength against the sector, log excess return	0.07	(0.13)	69

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score None of 9, period end 2026-04-30	
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	pass
Gross margin improved	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$800.9M
Operating cash flow, four quarters	$403.9M
Months of runway	not finite
Days since last periodic filing	49 (10-Q received Sep 9, 2026)
Median daily dollar volume, 63 sessions	$35.2M

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	operating income	us-gaap:OperatingIncomeLoss	$114.0M	2015-04-30	2017-06-28	10-K	17-216289
2	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$119.7M	2015-04-30	2017-06-28	10-K	17-216289
3	income tax	us-gaap:IncomeTaxExpenseBenefit	$33.5M	2015-04-30	2017-06-28	10-K	17-216289
4	total debt	us-gaap:LongTermDebt	$0	2015-04-30	2015-06-26	10-K	15-237143
5	book equity	us-gaap:StockholdersEquity	$815.2M	2015-04-30	2016-06-28	10-K	16-634657
6	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$380.8M	2015-04-30	2018-06-28	10-K	18-207569
7	total debt	us-gaap:LongTermDebt	$0	2014-04-30	2015-06-26	10-K	15-237143
8	book equity	us-gaap:StockholdersEquity	$755.5M	2014-04-30	2015-06-26	10-K	15-237143
9	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$333.7M	2014-04-30	2017-06-28	10-K	17-216289
10	net income	us-gaap:NetIncomeLoss	$277.4M	2026-04-30	2026-06-26	10-K	26-000021
11	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$414.2M	2026-04-30	2026-06-26	10-K	26-000021
12	assets	us-gaap:Assets	$4.1B	2026-04-30	2026-06-26	10-K	26-000021
13	assets	us-gaap:Assets	$3.9B	2025-04-30	2026-06-26	10-K	26-000021
14	current assets	us-gaap:AssetsCurrent	$1.9B	2026-04-30	2026-06-26	10-K	26-000021
15	current liabilities	us-gaap:LiabilitiesCurrent	$982.0M	2026-04-30	2026-06-26	10-K	26-000021
16	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$1.8B	2026-04-30	2026-06-26	10-K	26-000021
17	operating income	us-gaap:OperatingIncomeLoss	$374.7M	2026-04-30	2026-06-26	10-K	26-000021
18	book equity	us-gaap:StockholdersEquity	$2.0B	2026-04-30	2026-06-26	10-K	26-000021

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19	liabilities	us-gaap:Liabilities	$2.1B	2026-04-30	2026-06-26	10-K	26-000021
20	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$27.6M	2015-04-30	2017-06-28	10-K	17-216289
21	operating income	us-gaap:OperatingIncomeLoss	$91.6M	2014-04-30	2016-06-28	10-K	16-634657
22	interest expense	us-gaap:InterestExpense	$2.4M	2014-04-30	2014-06-27	10-K	14-253292
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$2.9B	2026-04-30	2026-06-26	10-K	26-000021
24	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$2.8B	2025-04-30	2026-06-26	10-K	26-000021
25	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$2.8B	2024-04-30	2026-06-26	10-K	26-000021
26	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$2.9B	2023-04-30	2025-06-27	10-K	25-033260
27	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$89.9M	2026-04-30	2026-06-26	10-K	26-000021
28	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$364.4M	2025-04-30	2026-06-26	10-K	26-000021
29	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$62.5M	2025-04-30	2026-06-26	10-K	26-000021
30	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$284.0M	2024-04-30	2026-06-26	10-K	26-000021
31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$55.1M	2024-04-30	2026-06-26	10-K	26-000021
32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$343.9M	2023-04-30	2025-06-27	10-K	25-033260
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$70.4M	2023-04-30	2025-06-27	10-K	25-033260
34	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$98.8M	2026-04-30	2026-06-26	10-K	26-000021
35	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$388.4M	2026-04-30	2026-06-26	10-K	26-000021
36	income tax	us-gaap:IncomeTaxExpenseBenefit	$107.6M	2026-04-30	2026-06-26	10-K	26-000021
37	current assets	us-gaap:AssetsCurrent	$1.8B	2025-04-30	2026-06-26	10-K	26-000021
38	current liabilities	us-gaap:LiabilitiesCurrent	$955.6M	2025-04-30	2026-06-26	10-K	26-000021
39	assets	us-gaap:Assets	$3.7B	2024-04-30	2025-06-27	10-K	25-033260
40	assets	us-gaap:Assets	$3.6B	2023-04-30	2024-06-28	10-K	24-030470
41	shares outstanding	dei:EntityCommonStockSharesOutstanding	50,857,000	2026-06-18	2026-06-26	10-K	26-000021
42	shares outstanding	dei:EntityCommonStockSharesOutstanding	51,921,000	2025-06-20	2025-06-27	10-K	25-033260

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