Strattec Security Corp. STRT

Nasdaq; consumer durables; SIC 3714, Motor Vehicle Parts & Accessories; CIK 0000933034

A

strongest fifth of 458 graded peers in the pooled consumer gr...

rank 20 of 458; percentile 4.6; sampling error 2.3 points; lower is stronger

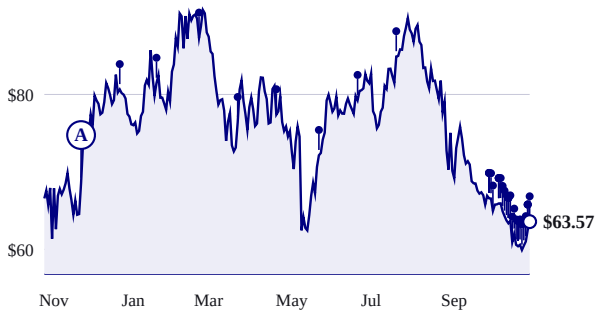
A B C D E

A, the bull



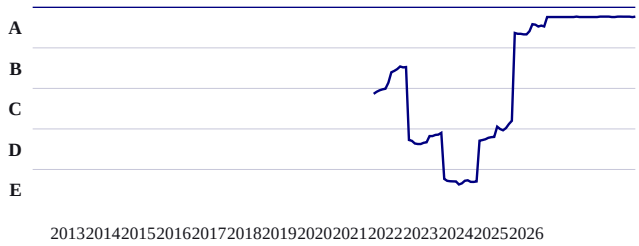
Scoreboard	
Profitability	C/D percentile 58.5
Solvency	A percentile 8.8
Growth and financing	B percentile 25.0
Reliability	0.87 AUC filers with $120M to $591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025
Peer failure rate	1.03% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$120M to $591M assets total assets $387.5M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress, fortress balance sheet
Inputs computable	10 of 14
Graded from	filings received through Aug 28, 2026 61 days before the rescan; latest periodic filing 10-K received Aug 28, 2026
Last close	$64.50 2026-10-27; market equity $257.0M; 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 Aug 28, 2026

Strattec is a global automotive access company that designs and delivers safe, secure, and highly engineered access solutions for the automotive and mobility markets. Built on generations of access and security engineering expertise, we partner closely with OEMs to create differentiated, system level access experiences for end consumers.

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 58.5						
Gross profitability	24.6%	34.4%		63.5	472	2026-06-28
Return on invested capital	not computable	8.9%				
one or more required annual facts are missing						
Accruals ratio	(6.6%)	(5.1%)		41.9	519	2026-06-28
Gross margin stability, five years	2.7 pts	1.7 pts		70.1	406	2026-06-28

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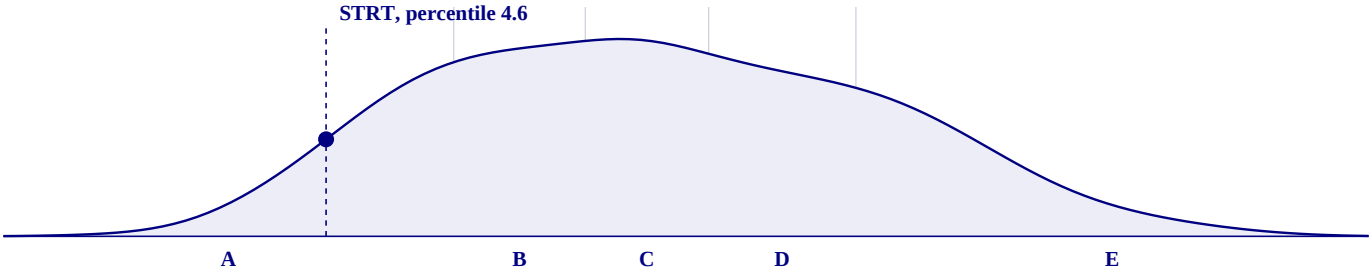
Solvency, sleeve percentile 8.8						
Twelve-month failure probability	not computable	0.04%				
latest liabilities, cash plus short-term investments, book equity, and shares are required						
Altman Z double-prime	8.24	2.13	6.1	396	2026-06-28	
Net debt to EBITDA	not computable	2.08x				
one or more required annual facts are missing						
Interest coverage	73.88x	2.64x	3.2	127	2026-06-28	
Current ratio	2.90x	1.56x	17.2	535	2026-06-28	
Growth and financing, sleeve percentile 25.0						
Revenue growth, three-year compound	5.5%	1.4%	28.4	480	2026-06-28	
Free cash flow growth, three-year compound	not computable	7.6%				
current FCF must be positive and base FCF must exceed $100,000						
Reinvestment rate	89.5%	12.3%	20.0	266	2026-06-28	
Asset growth, three years	4.4%	1.7%	35.3	485	2026-06-28	
Net share issuance, one year	(4.2%)	(0.3%)	16.2	378	2026-07-31	

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
15	National Beverage Corp. (FIZZ)	3.3	A	
16	Ross Stores, Inc. (ROST)	3.5	A	fortress balance sheet
17	Global Industrial Co. (GIC)	3.9	A	
18	Bellring Brands, Inc. (BRBR)	4.1	A	
19	SiteOne Landscape Supply, Inc. (SITE)	4.3	A	
20	Strattec Security Corp. (STRT)	4.6	A	
21	Costco Wholesale Corp. (COST)	4.7	A	fortress balance sheet
22	Mama's Creations, Inc. (MAMA)	4.9	A	fortress balance sheet
23	Tractor Supply Co. (TSCO)	5.1	A	fortress balance sheet
24	Chipotle Mexican Grill Inc. (CMG)	5.5	A	fortress balance sheet
25	Oil-Dri Corp. of America (ODC)	5.7	A	

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	3.1%	(0.1%)	55
Distance from 52-week high	(30.1%)	(24.5%)	42
EBIT to enterprise value	not computable	4.8%	
Free cash flow yield	15.4%	4.4%	89
Book value to price	0.94	0.43	76
Sales to price	2.29	1.46	66
Composite equity issuance, five years	2.5%	(16.0%)	79
Relative strength against the sector, log excess return	0.05	(0.01)	59

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Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score None of 9, period end 2026-06-28	
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	fail
Current ratio improved	pass
No new shares issued	pass
Gross margin improved	pass
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$108.2M
Operating cash flow, four quarters	$46.3M
Months of runway	not finite
Days since last periodic filing	61 (10-K received Aug 28, 2026)
Median daily dollar volume, 63 sessions	$5.5M

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	$95.4M	2026-06-28	2026-08-28	10-K	26-374333
2	assets	us-gaap:Assets	$387.5M	2026-06-28	2026-08-28	10-K	26-374333
3	net income	us-gaap:NetIncomeLoss	$20.6M	2026-06-28	2026-08-28	10-K	26-374333
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$46.3M	2026-06-28	2026-08-28	10-K	26-374333
5	assets	us-gaap:Assets	$391.5M	2025-06-29	2026-08-28	10-K	26-374333
6	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$579.4M	2026-06-28	2026-08-28	10-K	26-374333
7	gross profit	us-gaap:GrossProfit	$84.6M	2025-06-29	2026-08-28	10-K	26-374333
8	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$565.1M	2025-06-29	2026-08-28	10-K	26-374333
9	gross profit	us-gaap:GrossProfit	$65.5M	2024-06-30	2026-08-28	10-K	26-374333
10	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$537.8M	2024-06-30	2026-08-28	10-K	26-374333
11	gross profit	us-gaap:GrossProfit	$42.2M	2023-07-02	2024-09-05	10-K	24-104109
12	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$492.9M	2023-07-02	2024-09-05	10-K	24-104109
13	gross profit	us-gaap:GrossProfit	$56.0M	2022-07-03	2023-09-07	10-K	23-046852
14	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$452.3M	2022-07-03	2023-09-07	10-K	23-046852
15	current assets	us-gaap:AssetsCurrent	$296.3M	2026-06-28	2026-08-28	10-K	26-374333
16	current liabilities	us-gaap:LiabilitiesCurrent	$102.2M	2026-06-28	2026-08-28	10-K	26-374333
17	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$289.9M	2026-06-28	2026-08-28	10-K	26-374333
18	operating income	us-gaap:OperatingIncomeLoss	$26.5M	2026-06-28	2026-08-28	10-K	26-374333
19	book equity	us-gaap:StockholdersEquity	$238.6M	2026-06-28	2026-08-28	10-K	26-374333
20	liabilities	us-gaap:Liabilities	$122.0M	2026-06-28	2026-08-28	10-K	26-374333
21	interest expense	us-gaap:InterestExpense	$359,000	2026-06-28	2026-08-28	10-K	26-374333
22	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$7.3M	2026-06-28	2026-08-28	10-K	26-374333
23	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$71.7M	2025-06-29	2026-08-28	10-K	26-374333
24	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$7.2M	2025-06-29	2026-08-28	10-K	26-374333
25	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$12.3M	2024-06-30	2026-08-28	10-K	26-374333
26	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$9.8M	2024-06-30	2024-09-05	10-K	24-104109
27	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$10.1M	2023-07-02	2024-09-05	10-K	24-104109
28	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$17.4M	2023-07-02	2024-09-05	10-K	24-104109
29	depreciation amortization	us-gaap:Depreciation	$15.1M	2026-06-28	2026-08-28	10-K	26-374333
30	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$33.0M	2026-06-28	2026-08-28	10-K	26-374333
31	income tax	us-gaap:IncomeTaxExpenseBenefit	$11.3M	2026-06-28	2026-08-28	10-K	26-374333

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32	current assets	us-gaap:AssetsCurrent	$290.1M	2025-06-29	2026-08-28	10-K	26-374333
33	current liabilities	us-gaap:LiabilitiesCurrent	$119.3M	2025-06-29	2026-08-28	10-K	26-374333
34	assets	us-gaap:Assets	$364.3M	2024-06-30	2025-08-25	10-K	25-111218
35	assets	us-gaap:Assets	$340.9M	2023-07-02	2024-09-05	10-K	24-104109
36	shares outstanding	dei:EntityCommonStockSharesOutstanding	3,985,013	2026-07-31	2026-08-28	10-K	26-374333
37	shares outstanding	dei:EntityCommonStockSharesOutstanding	4,161,334	2025-08-01	2025-08-25	10-K	25-111218

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