RCM Technologies, Inc.

RCMT

Nasdaq; other; SIC 7363, Services-Help Supply Services; CIK 0000700841

A/B

on the A/B boundary of 335 graded peers in other

rank 63 of 335; percentile 18.6; sampling error 2.6 points; lower is stronger

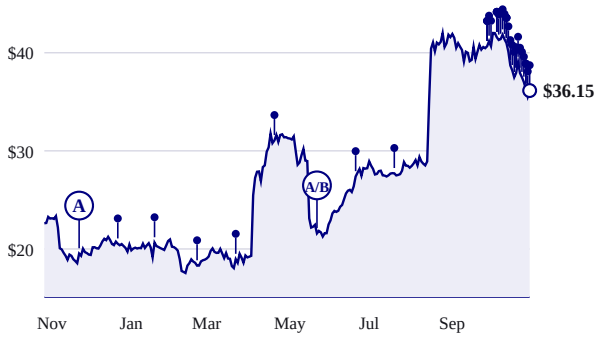


A/B, the bull



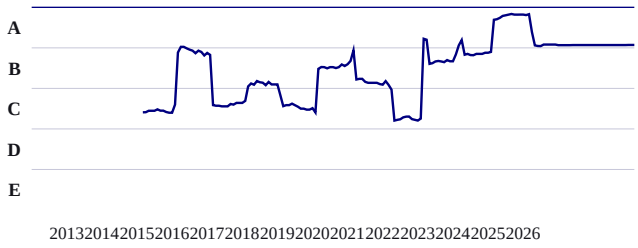
Scoreboard	
Profitability	B percentile 37.2
Solvency	B percentile 24.9
Growth and financing	C percentile 49.4
Reliability	0.87 AUC filers with $120M to $591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025
Peer failure rate	1.03% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$120M to $591M assets total assets $134.4M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	late filer not computable: dilution, distress, fortress balance sheet
Inputs computable	9 of 14
Graded from	filings received through May 4, 2026 178 days before the rescan; latest periodic filing 10-Q received Aug 13, 2026
Last close	$36.09 2026-10-28; market equity $256.6M; 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 Apr 3, 2026

RCM Technologies, Inc. is a premier provider of business and technology solutions designed to enhance and maximize its customers' operational performance. The Company provides these services through the deployment of specialty healthcare, engineering, life sciences, information technology services, data management and solutions. For over 50 years, the Company has developed and assembled an extensive portfolio of capabilities, service offerings, and delivery options with world-class technical talent in key end markets and high-growth industries. This combination, paired with RCM's efficient pricing structure and global reach, offers clients a compelling value proposition.

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 37.2						
Gross profitability	65.4%	27.0%		9.8	287	2026-01-03
Return on invested capital	not computable	10.0%				

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one or more required annual facts are missing						
Accruals ratio	(2.0%)	(5.8%)	76.7	503	2026-01-03	
Gross margin stability, five years	1.2 pts	2.2 pts	25.0	205	2026-01-03	
Solvency, sleeve percentile 24.9						
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	4.30	2.05	19.3	385	2026-01-03	
Net debt to EBITDA	not computable	2.52x				
one or more required annual facts are missing						
Interest coverage	not computable	2.45x				
one or more required annual facts are missing						
Current ratio	1.85x	1.33x	30.4	507	2026-01-03	
Growth and financing, sleeve percentile 49.4						
Revenue growth, three-year compound	3.9%	5.1%	52.1	400	2026-01-03	
Free cash flow growth, three-year compound	(14.1%)	8.8%	75.0	221	2026-01-03	
Reinvestment rate	12.2%	11.6%	49.5	191	2026-01-03	
Asset growth, three years	15.2%	4.2%	20.9	437	2026-01-03	
Net share issuance, one year	not computable	(0.5%)				
prior share count is 25 days earlier						

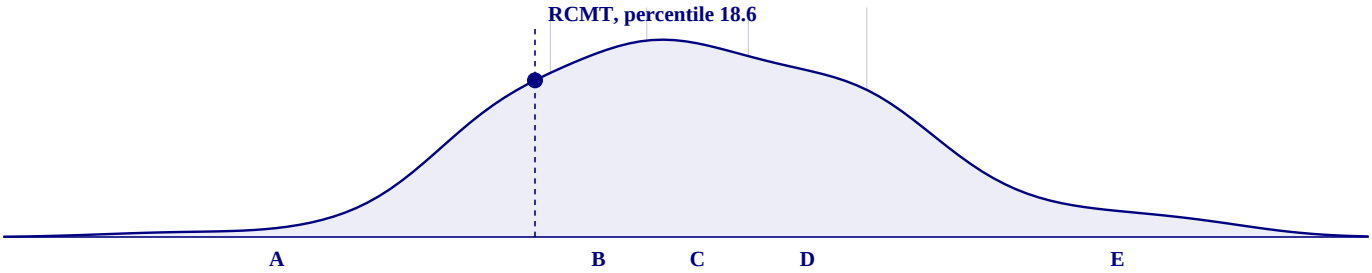
Warnings

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

Check	Measured
Late filer	found 1 NT 10-K/Q filings in the last eight quarters

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
58	Tidewater Inc. (TDW)	17.1	A	
59	Msci Inc. (MSCI)	17.4	A/B	
60	Primoris Services Corp. (PRIM)	17.7	A/B	fortress balance sheet
61	Construction Partners, Inc. (ROAD)	18.0	A/B	
62	Canterbury Park Holding Corp. (CPHC)	18.3	A/B	
63	RCM Technologies, Inc. (RCMT)	18.6	A/B	late filer
64	Argan Inc. (AGX)	18.9	A/B	
65	UFP Industries Inc. (UFPI)	19.2	A/B	fortress balance sheet
66	Hunt J B Transport Services Inc. (JBHT)	19.5	A/B	
67	Stran & Company, Inc. (SWAG)	19.9	A/B	late filer, fortress balance sheet
68	Stran & Company, Inc. (SWAGW)	19.9	A/B	late filer, fortress balance sheet

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What the price implies

at the 2026-10-28 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	56.7%	2.0%	87
Distance from 52-week high	(14.0%)	(26.4%)	67
EBIT to enterprise value	not computable	4.3%	
Free cash flow yield	6.8%	4.2%	70
Book value to price	0.19	0.34	30
Sales to price	1.24	0.71	67
Composite equity issuance, five years	(47.9%)	(8.9%)	5
Relative strength against the sector, log excess return	0.30	(0.13)	87

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score None of 9, period end 2026-01-03	
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	fail
Gross margin improved	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$6.6M
Operating cash flow, four quarters	$23.7M
Months of runway	not finite
Days since last periodic filing	77 (10-Q received Aug 13, 2026)
Median daily dollar volume, 63 sessions	$2.3M

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	$87.9M	2026-01-03	2026-04-03	10-K	26-011236
2	assets	us-gaap:Assets	$134.4M	2026-01-03	2026-04-03	10-K	26-011236
3	net income	us-gaap:NetIncomeLoss	$16.3M	2026-01-03	2026-04-03	10-K	26-011236
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$19.0M	2026-01-03	2026-04-03	10-K	26-011236
5	assets	us-gaap:Assets	$132.1M	2024-12-28	2026-04-03	10-K	26-011236
6	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$319.4M	2026-01-03	2026-04-03	10-K	26-011236
7	gross profit	us-gaap:GrossProfit	$79.8M	2024-12-28	2026-04-03	10-K	26-011236
8	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$278.4M	2024-12-28	2026-04-03	10-K	26-011236
9	gross profit	us-gaap:GrossProfit	$76.7M	2023-12-30	2025-03-31	10-K/A	25-010202
10	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$263.2M	2023-12-30	2025-03-31	10-K/A	25-010202
11	gross profit	us-gaap:GrossProfit	$82.9M	2022-12-31	2024-03-14	10-K	24-007884
12	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$284.7M	2022-12-31	2024-03-14	10-K	24-007884
13	gross profit	us-gaap:GrossProfit	$53.1M	2022-01-01	2024-03-14	10-K	24-007884
14	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$203.9M	2022-01-01	2024-03-14	10-K	24-007884
15	current assets	us-gaap:AssetsCurrent	$99.9M	2026-01-03	2026-04-03	10-K	26-011236
16	current liabilities	us-gaap:LiabilitiesCurrent	$53.9M	2026-01-03	2026-04-03	10-K	26-011236
17	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$10.4M	2026-01-03	2026-04-03	10-K	26-011236
18	operating income	us-gaap:OperatingIncomeLoss	$25.1M	2026-01-03	2026-04-03	10-K	26-011236

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19	book equity	us-gaap:StockholdersEquity	$46.0M	2026-01-03	2026-04-03	10-K	26-011236
20	liabilities	us-gaap:Liabilities	$88.4M	2026-01-03	2026-04-03	10-K	26-011236
21	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$1.6M	2026-01-03	2026-04-03	10-K	26-011236
22	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$6.2M	2024-12-28	2026-04-03	10-K	26-011236
23	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$2.6M	2024-12-28	2026-04-03	10-K	26-011236
24	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$12.5M	2023-12-30	2025-03-31	10-K/A	25-010202
25	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$2.9M	2023-12-30	2025-03-31	10-K/A	25-010202
26	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$28.3M	2022-12-31	2024-03-14	10-K	24-007884
27	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$889,000	2022-12-31	2024-03-14	10-K	24-007884
28	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$1.9M	2026-01-03	2026-04-03	10-K	26-011236
29	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$22.1M	2026-01-03	2026-04-03	10-K	26-011236
30	income tax	us-gaap:IncomeTaxExpenseBenefit	$5.7M	2026-01-03	2026-04-03	10-K	26-011236
31	current assets	us-gaap:AssetsCurrent	$97.0M	2024-12-28	2026-04-03	10-K	26-011236
32	current liabilities	us-gaap:LiabilitiesCurrent	$53.6M	2024-12-28	2026-04-03	10-K	26-011236
33	assets	us-gaap:Assets	$120.5M	2023-12-30	2025-03-31	10-K/A	25-010202
34	assets	us-gaap:Assets	$88.0M	2022-12-31	2024-03-14	10-K	24-007884
35	shares outstanding	dei:EntityCommonStockSharesOutstanding	7,087,613	2026-04-27	2026-05-04	10-K/A	26-014678
36	shares outstanding	dei:EntityCommonStockSharesOutstanding	7,024,377	2026-04-02	2026-04-03	10-K	26-011236

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