Rimini Street, Inc.

RMNI

Nasdaq; other; SIC 7389, Services-Business Services, NEC; CIK 0001635282

C

middle fifth of 335 graded peers in other

rank 178 of 335; percentile 53.0; sampling error 2.6 points; lower is stronger

A B C D E

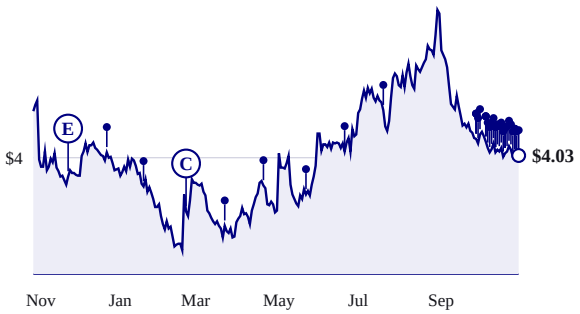
C, the tortoise



Scoreboard

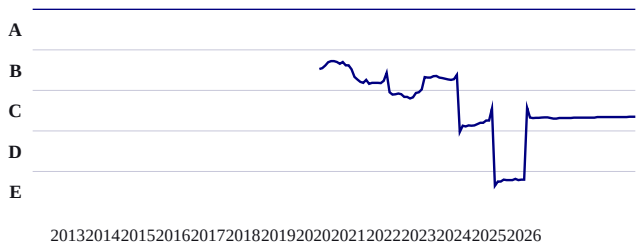
Profitability	B percentile 28.6
Solvency	D percentile 69.8
Growth and financing	C percentile 47.0
Reliability	0.87 AUC filers with $120M to $591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025
Peer failure rate	1.03% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$120M to $591M assets total assets $423.1M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered; fortress balance sheet not computable: distress
Inputs computable	10 of 14
Graded from	filings received through Feb 19, 2026 252 days before the rescan; latest periodic filing 10-Q received Jul 30, 2026
Last close	$4.03 2026-10-28; market equity $376.2M; 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 19, 2026

Rimini Street, Inc. and its subsidiaries (referred to as "Rimini Street," the "Company," "we" and "us") are global providers of end-to-end third-party enterprise software support, managed services and Agentic AI ERP innovation solutions. Rimini Street, Inc. was formed in the State of Nevada in 2005 and, through a merger in 2017 with a public company, became Rimini Street, Inc., a Delaware corporation, trading on the Nasdaq Global Market under the ticker symbol "RMNI.

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 28.6						
Gross profitability	60.2%	27.0%		10.5	287	2025-12-31
Return on invested capital	not computable	10.0%				
average invested capital must exceed $1,000,000						
Accruals ratio	(5.8%)	(5.8%)		49.4	503	2025-12-31

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Gross margin stability, five years	1.2 pts	2.2 pts	26.0	205	2025-12-31
Solvency, sleeve percentile 69.8					
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	(1.39)	2.05	68.8	385	2025-12-31
Net debt to EBITDA	not computable	2.52x			
latest aligned inputs end 2019-12-31; latest annual assets end 2025-12-31					
Interest coverage	not computable	2.45x			
latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31					
Current ratio	0.86x	1.33x	70.8	507	2025-12-31
Growth and financing, sleeve percentile 47.0					
Revenue growth, three-year compound	1.0%	5.1%	64.4	400	2025-12-31
Free cash flow growth, three-year compound	22.1%	8.8%	30.0	221	2025-12-31
Reinvestment rate	55.0%	11.6%	29.5	191	2025-12-31
Asset growth, three years	2.7%	4.2%	56.4	437	2025-12-31
Net share issuance, one year	0.4%	(0.5%)	54.8	353	2026-02-17

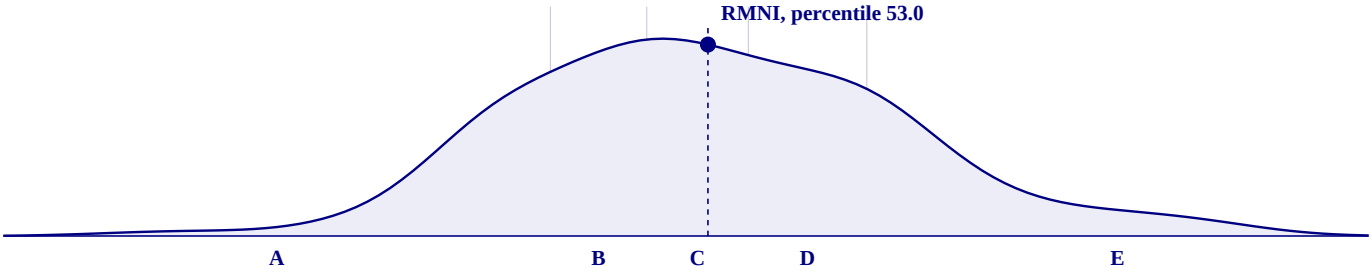
Warnings

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

Check	Measured
Fortress balance sheet	cash minus debt is 37,952,000 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
173	Louisiana-Pacific Corp. (LPX)	51.5	C	
174	Matson, Inc. (MATX)	51.8	C	
175	Reservoir Media, Inc. (RSVR)	52.1	C	
176	Wynn Resorts Ltd. (WYNN)	52.4	C	
177	Robert Half Inc. (RHI)	52.7	C	fortress balance sheet
178	Rimini Street, Inc. (RMNI)	53.0	C	fortress balance sheet
179	Choice Hotels International Inc. (CHH)	53.3	C	
180	Union Pacific Corp. (UNP)	53.6	C	
181	Arlo Technologies, Inc. (ARLO)	53.9	C	
182	Hilton Worldwide Holdings Inc. (HLT)	54.2	C	
183	Lyft, Inc. (LYFT)	54.5	C	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	19.9%	2.0%	67
Distance from 52-week high	(28.8%)	(26.4%)	45
EBIT to enterprise value	17.5%	4.3%	97
Free cash flow yield	14.8%	4.2%	91
Book value to price	(0.04)	0.34	7
Sales to price	1.12	0.71	64
Composite equity issuance, five years	19.4%	(8.9%)	83
Relative strength against the sector, log excess return	0.03	(0.13)	67

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	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$123.4M
Operating cash flow, four quarters	$67.2M
Months of runway	not finite
Days since last periodic filing	91 (10-Q received Jul 30, 2026)
Median daily dollar volume, 63 sessions	$1.6M

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	$254.6M	2025-12-31	2026-02-19	10-K	26-000014
2	assets	us-gaap:Assets	$423.1M	2025-12-31	2026-02-19	10-K	26-000014
3	operating income	us-gaap:OperatingIncomeLoss	$22.1M	2019-12-31	2022-03-02	10-K	22-000049
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$24.1M	2019-12-31	2022-03-02	10-K	22-000049
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$2.7M	2019-12-31	2022-03-02	10-K	22-000049
6	total debt	us-gaap:LongTermDebt	$0	2019-12-31	2020-03-16	10-K	20-000014
7	book equity	us-gaap:StockholdersEquity	-$223.3M	2019-12-31	2023-03-01	10-K	23-000054
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$38.0M	2019-12-31	2021-05-10	10-K/A	21-000069
9	total debt	us-gaap:LongTermDebt	$2.4M	2018-12-31	2020-03-16	10-K	20-000014
10	book equity	us-gaap:StockholdersEquity	-$230.0M	2018-12-31	2022-03-02	10-K	22-000049
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$24.8M	2018-12-31	2020-03-16	10-K	20-000014
12	net income	us-gaap:NetIncomeLoss	$37.1M	2025-12-31	2026-02-19	10-K	26-000014
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$60.2M	2025-12-31	2026-02-19	10-K	26-000014
14	assets	us-gaap:Assets	$369.1M	2024-12-31	2026-02-19	10-K	26-000014
15	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$421.5M	2025-12-31	2026-02-19	10-K	26-000014
16	gross profit	us-gaap:GrossProfit	$261.0M	2024-12-31	2026-02-19	10-K	26-000014
17	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$428.8M	2024-12-31	2026-02-19	10-K	26-000014
18	gross profit	us-gaap:GrossProfit	$269.0M	2023-12-31	2026-02-19	10-K	26-000014

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19	revenue	us-gaap:Revenues	$431.5M	2023-12-31	2024-02-28	10-K	24-000030
20	gross profit	us-gaap:GrossProfit	$257.3M	2022-12-31	2025-02-27	10-K	25-000029
21	revenue	us-gaap:Revenues	$409.7M	2022-12-31	2024-02-28	10-K	24-000030
22	gross profit	us-gaap:GrossProfit	$238.0M	2021-12-31	2024-02-28	10-K	24-000030
23	revenue	us-gaap:Revenues	$374.4M	2021-12-31	2024-02-28	10-K	24-000030
24	current assets	us-gaap:AssetsCurrent	$300.4M	2025-12-31	2026-02-19	10-K	26-000014
25	current liabilities	us-gaap:LiabilitiesCurrent	$347.4M	2025-12-31	2026-02-19	10-K	26-000014
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$201.4M	2025-12-31	2026-02-19	10-K	26-000014
27	operating income	us-gaap:OperatingIncomeLoss	$59.9M	2025-12-31	2026-02-19	10-K	26-000014
28	book equity	us-gaap:StockholdersEquity	-$27.0M	2025-12-31	2026-02-19	10-K	26-000014
29	liabilities	us-gaap:Liabilities	$450.1M	2025-12-31	2026-02-19	10-K	26-000014
30	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$1.9M	2019-12-31	2022-03-02	10-K	22-000049
31	operating income	us-gaap:OperatingIncomeLoss	$43.8M	2023-12-31	2026-02-19	10-K	26-000014
32	interest expense	us-gaap:InterestExpense	$5.5M	2023-12-31	2024-02-28	10-K	24-000030
33	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$4.6M	2025-12-31	2026-02-19	10-K	26-000014
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$38.8M	2024-12-31	2026-02-19	10-K	26-000014
35	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$3.4M	2024-12-31	2026-02-19	10-K	26-000014
36	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$12.5M	2023-12-31	2026-02-19	10-K	26-000014
37	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$7.2M	2023-12-31	2026-02-19	10-K	26-000014
38	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$34.9M	2022-12-31	2025-02-27	10-K	25-000029
39	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$4.3M	2022-12-31	2025-02-27	10-K	25-000029
40	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$3.9M	2025-12-31	2026-02-19	10-K	26-000014
41	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$55.6M	2025-12-31	2026-02-19	10-K	26-000014
42	income tax	us-gaap:IncomeTaxExpenseBenefit	$18.5M	2025-12-31	2026-02-19	10-K	26-000014
43	current assets	us-gaap:AssetsCurrent	$256.3M	2024-12-31	2026-02-19	10-K	26-000014
44	current liabilities	us-gaap:LiabilitiesCurrent	$324.6M	2024-12-31	2026-02-19	10-K	26-000014
45	assets	us-gaap:Assets	$393.8M	2023-12-31	2025-02-27	10-K	25-000029
46	assets	us-gaap:Assets	$391.0M	2022-12-31	2024-02-28	10-K	24-000030
47	shares outstanding	dei:EntityCommonStockSharesOutstanding	91,664,000	2026-02-17	2026-02-19	10-K	26-000014
48	shares outstanding	dei:EntityCommonStockSharesOutstanding	91,296,000	2025-02-25	2025-02-27	10-K	25-000029

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