Sitime Corp.

SITM

Nasdaq; business equipment; SIC 3674, Semiconductors & Related Devices; CIK 0001451809

A

strongest fifth of 497 graded peers in business equipment

rank 75 of 497; percentile 14.9; sampling error 2.2 points; lower is stronger

A B C D E

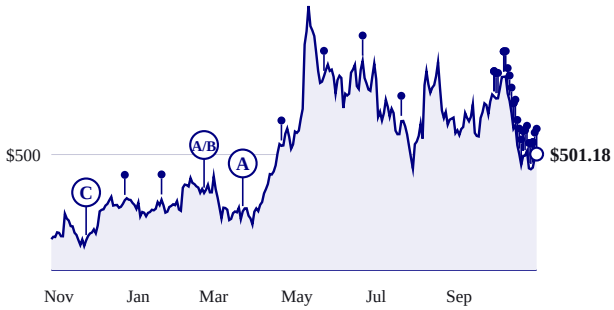
A, the bull



Scoreboard

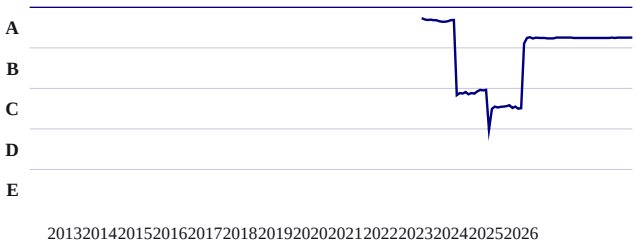
Profitability	C/D percentile 61.7
Solvency	A percentile 5.4
Growth and financing	B/C percentile 41.6
Reliability	0.91 AUC filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025
Peer failure rate	1.01% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$591M to $2.67B assets total assets $1.3B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: short runway, distress, fortress balance sheet
Inputs computable	9 of 14
Graded from	filings received through Feb 11, 2026 260 days before the rescan; latest periodic filing 10-Q received Aug 6, 2026
Last close	$501.10 2026-10-28; market equity $15.1B; 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 11, 2026

The ability to accurately measure and reference time has been essential to humankind's greatest inventions and technological advances. Timing technology has continued to evolve over centuries, underpinning broader technological evolution and is the heartbeat of digital electronic systems. Timing ensures that the system runs smoothly and reliably by providing and distributing clock signals to various critical components such as central processing units, communication and interface ICs, and radio frequency components.

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 61.7						
Gross profitability	13.5%	28.6%		75.5	555	2025-12-31
Return on invested capital	not computable	11.2%				

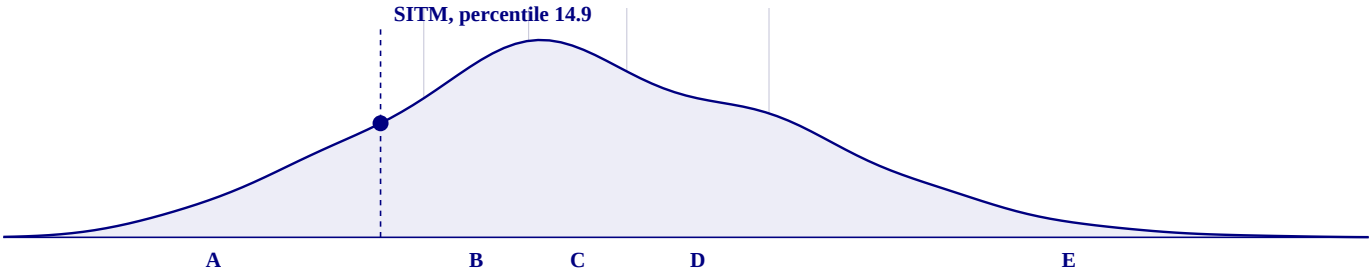
one or more required annual facts are missing

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Accruals ratio	(11.9%)	(7.4%)		35.5	618	2025-12-31
Gross margin stability, five years	5.2 pts	2.3 pts		74.1	426	2025-12-31
Solvency, sleeve percentile 5.4						
Twelve-month failure probability	not computable	0.05%				
latest liabilities, cash plus short-term investments, book equity, and shares are required						
Altman Z double-prime	12.23	2.16		4.8	565	2025-12-31
Net debt to EBITDA	not computable	1.11x				
one or more required annual facts are missing						
Interest coverage	not computable	3.77x				
latest aligned inputs end 2020-12-31; latest annual assets end 2025-12-31						
Current ratio	11.30x	2.01x		6.1	662	2025-12-31
Growth and financing, sleeve percentile 41.6						
Revenue growth, three-year compound	4.8%	6.3%		54.1	535	2025-12-31
Free cash flow growth, three-year compound	64.0%	18.0%		14.8	265	2025-12-31
Reinvestment rate	not computable	14.3%				
pretax income must exceed the validity floor and imply a 0%-100% tax rate						
Asset growth, three years	19.9%	5.1%		18.2	560	2025-12-31
Net share issuance, one year	11.5%	0.5%		79.2	409	2026-02-05

Among 497 peers

business equipment; 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
70	Zeta Global Holdings Corp. (ZETA)	13.9	A	fortress balance sheet
71	Grindr Inc. (GRND)	14.1	A	
72	NetApp, Inc. (NTAP)	14.3	A	
73	Photronics Inc. (PLAB)	14.5	A	fortress balance sheet
74	Lattice Semiconductor Corp. (LSCC)	14.7	A	
75	Sitime Corp. (SITM)	14.9	A	
76	Upwork, Inc. (UPWK)	15.1	A	
77	Onto Innovation Inc. (ONTO)	15.3	A	fortress balance sheet
78	Zoom Communications, Inc. (ZM)	15.5	A	
79	Procore Technologies, Inc. (PCOR)	15.7	A	
80	Nextdoor Holdings, Inc. (NXDR)	15.9	A	

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	87.7%	2.2%	88
Distance from 52-week high	(44.4%)	(30.5%)	32
EBIT to enterprise value	not computable	1.5%	
Free cash flow yield	0.2%	2.8%	26
Book value to price	0.07	0.25	18

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Sales to price	0.02	0.31	2
Composite equity issuance, five years	56.2%	4.1%	87
Relative strength against the sector, log excess return	0.35	(0.26)	88

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score None of 9, period end 2025-12-31	
Return on assets above zero	fail
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	pass
Asset turnover improved	pass
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 6, 2026)
Median daily dollar volume, 63 sessions	$241.9M

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	$175.0M	2025-12-31	2026-02-11	10-K	26-000012
2	assets	us-gaap:Assets	$1.3B	2025-12-31	2026-02-11	10-K	26-000012
3	net income	us-gaap:NetIncomeLoss	-$42.9M	2025-12-31	2026-02-11	10-K	26-000012
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$87.2M	2025-12-31	2026-02-11	10-K	26-000012
5	assets	us-gaap:Assets	$885.0M	2024-12-31	2026-02-11	10-K	26-000012
6	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$326.7M	2025-12-31	2026-02-11	10-K	26-000012
7	gross profit	us-gaap:GrossProfit	$104.5M	2024-12-31	2026-02-11	10-K	26-000012
8	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$202.7M	2024-12-31	2026-02-11	10-K	26-000012
9	gross profit	us-gaap:GrossProfit	$82.1M	2023-12-31	2026-02-11	10-K	26-000012
10	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$144.0M	2023-12-31	2026-02-11	10-K	26-000012
11	gross profit	us-gaap:GrossProfit	$183.0M	2022-12-31	2025-02-14	10-K	25-000034
12	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$283.6M	2022-12-31	2025-02-14	10-K	25-000034
13	gross profit	us-gaap:GrossProfit	$139.5M	2021-12-31	2024-02-26	10-K	24-000052
14	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$218.8M	2021-12-31	2024-02-26	10-K	24-000052
15	current assets	us-gaap:AssetsCurrent	$949.3M	2025-12-31	2026-02-11	10-K	26-000012
16	current liabilities	us-gaap:LiabilitiesCurrent	$84.0M	2025-12-31	2026-02-11	10-K	26-000012
17	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$224.9M	2025-12-31	2026-02-11	10-K	26-000012
18	operating income	us-gaap:OperatingIncomeLoss	-$67.0M	2025-12-31	2026-02-11	10-K	26-000012
19	book equity	us-gaap:StockholdersEquity	$1.2B	2025-12-31	2026-02-11	10-K	26-000012
20	liabilities	us-gaap:Liabilities	$138.5M	2025-12-31	2026-02-11	10-K	26-000012
21	operating income	us-gaap:OperatingIncomeLoss	-$8.6M	2020-12-31	2023-02-27	10-K	23-004647
22	interest expense	us-gaap:InterestExpense	$726,000	2020-12-31	2022-02-25	10-K	22-002096
23	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$52.0M	2025-12-31	2026-02-11	10-K	26-000012
24	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$23.2M	2024-12-31	2026-02-11	10-K	26-000012
25	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$36.2M	2024-12-31	2026-02-11	10-K	26-000012
26	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$8.1M	2023-12-31	2026-02-11	10-K	26-000012
27	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$8.9M	2023-12-31	2026-02-11	10-K	26-000012

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28	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$39.8M	2022-12-31	2025-02-14	10-K	25-000034
29	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$31.8M	2022-12-31	2025-02-14	10-K	25-000034
30	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$40.2M	2025-12-31	2026-02-11	10-K	26-000012
31	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$42.3M	2025-12-31	2026-02-11	10-K	26-000012
32	income tax	us-gaap:IncomeTaxExpenseBenefit	$598,000	2025-12-31	2026-02-11	10-K	26-000012
33	current assets	us-gaap:AssetsCurrent	$544.1M	2024-12-31	2026-02-11	10-K	26-000012
34	current liabilities	us-gaap:LiabilitiesCurrent	$108.4M	2024-12-31	2026-02-11	10-K	26-000012
35	assets	us-gaap:Assets	$951.7M	2023-12-31	2025-02-14	10-K	25-000034
36	assets	us-gaap:Assets	$750.6M	2022-12-31	2024-02-26	10-K	24-000052
37	shares outstanding	dei:EntityCommonStockSharesOutstanding	26,299,915	2026-02-05	2026-02-11	10-K	26-000012
38	shares outstanding	dei:EntityCommonStockSharesOutstanding	23,597,831	2025-02-10	2025-02-14	10-K	25-000034

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