Stagwell Inc.

STGW

Nasdaq; other; SIC 7311, Services-Advertising Agencies; CIK 0000876883

E

weakest fifth of 335 graded peers in other

rank 278 of 335; percentile 82.9; sampling error 2.6 points; lower is stronger

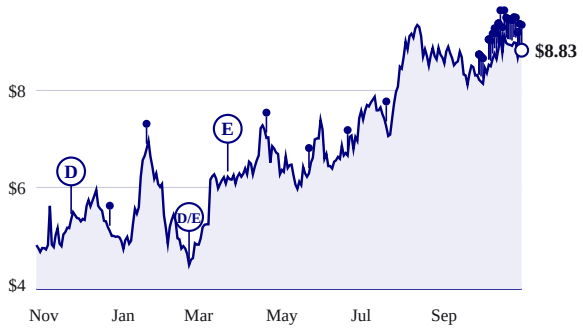
A B C D E

E, the bear



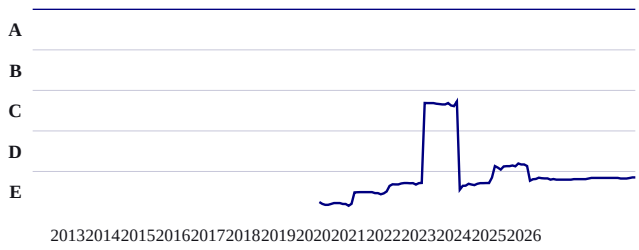
Scoreboard	
Profitability	C percentile 48.4
Solvency	D percentile 63.1
Growth and financing	D percentile 71.4
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $4.2B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: dilution, distress
Inputs computable	12 of 14
Graded from	filings received through Mar 13, 2026 230 days before the rescan; latest periodic filing 10-Q received Jul 31, 2026
Last close	$8.85 2026-10-28; market equity $2.2B; 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 Mar 13, 2026

Stagwell Inc. is the global challenger network transforming marketing through artificial intelligence ("AI"). Stagwell delivers scaled creative performance for the world's most ambitious brands, connecting culture-moving creativity with leading-edge technology to harmonize the art and science of marketing. Led by entrepreneurs, our specialists in over 34 countries have a unified purpose: to drive effectiveness and improve business results for our more than 4,500 clients as of December 31, 2025.

The fourteen inputs

lower percentile is stronger; sleeves and inputs within a sleeve carry equal weight

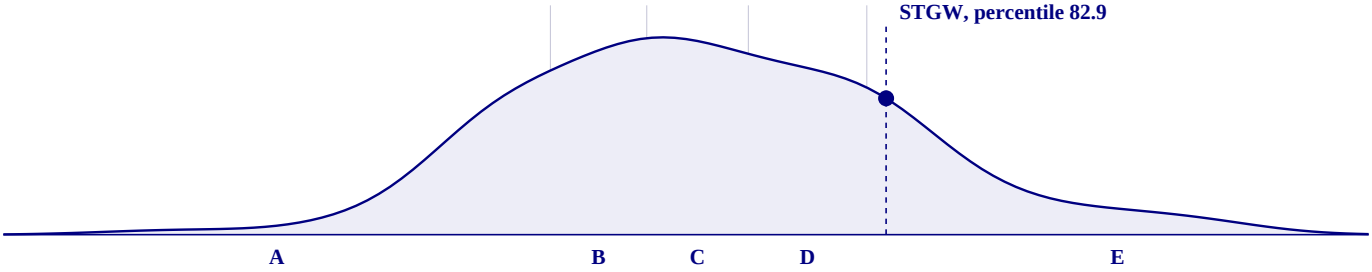
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 48.4						
Gross profitability	25.2%	27.0%		49.3	287	2025-12-31
Return on invested capital	4.0%	10.0%		74.0	151	2025-12-31
Accruals ratio	(6.4%)	(5.8%)		45.6	503	2025-12-31
Gross margin stability, five years	1.2 pts	2.2 pts		24.5	205	2025-12-31

Not investment advice. Informational and educational only. Data from SEC EDGAR, may contain errors, is not warranted. The grade ranks reported financial condition and is not a return forecast.

Solvency, sleeve percentile 63.1					
Twelve-month failure probability	not computable	0.04%			
liabilities and a nearby cover-page share count are required at 2025-12-31					
Altman Z double-prime	0.02	2.05	60.2	385	2025-12-31
Net debt to EBITDA	3.70x	2.52x	65.2	182	2025-12-31
Interest coverage	1.65x	2.45x	50.6	88	2025-12-31
Current ratio	0.79x	1.33x	76.5	507	2025-12-31
Growth and financing, sleeve percentile 71.4					
Revenue growth, three-year compound	2.7%	5.1%	57.6	400	2025-12-31
Free cash flow growth, three-year compound	(8.7%)	8.8%	70.9	221	2025-12-31
Reinvestment rate	(302.1%)	11.6%	96.3	191	2025-12-31
Asset growth, three years	1.8%	4.2%	60.8	437	2025-12-31
Net share issuance, one year	not computable	(0.5%)			
two annual share counts are required; found 1					

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
273	Omnicom Group Inc. (OMC)	81.4	D/E	dilution
274	Uranium Energy Corp. (UEC)	81.7	D/E	fortress balance sheet
275	Seacor Marine Holdings Inc. (SMHI)	82.0	D/E	
276	Access Newswire Inc. (ACCS)	82.3	D/E	
277	NextTrip, Inc. (NTRP)	82.6	D/E	dilution, short runway
278	Stagwell Inc. (STGW)	82.9	E	
279	Travelzoo (TZOO)	83.2	E	
280	Delek Logistics Partners, L.P. (DKL)	83.5	E	
281	Repay Holdings Corp. (RPAY)	83.8	E	
282	MP Materials Corp. DE (MP)	84.1	E	fortress balance sheet
283	Getty Images Holdings, Inc. (GETYQ)	84.4	E	

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	54.2%	2.0%	86
Distance from 52-week high	(5.6%)	(26.4%)	84
EBIT to enterprise value	4.5%	4.3%	51
Free cash flow yield	11.5%	4.2%	87
Book value to price	0.31	0.34	46
Sales to price	1.35	0.71	70
Composite equity issuance, five years	not computable	(8.9%)	
Relative strength against the sector, log excess return	0.29	(0.13)	86

Not investment advice. Informational and educational only. Data from SEC EDGAR, may contain errors, is not warranted. The grade ranks reported financial condition and is not a return forecast.

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	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	fail
No new shares issued	fail
Gross margin improved	pass
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$109.5M
Operating cash flow, four quarters	$300.0M
Months of runway	not finite
Days since last periodic filing	90 (10-Q received Jul 31, 2026)
Median daily dollar volume, 63 sessions	$11.5M

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	revenue	us-gaap:Revenues	$2.9B	2025-12-31	2026-03-13	10-K	26-000010
2	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$1.8B	2025-12-31	2026-03-13	10-K	26-000010
3	assets	us-gaap:Assets	$4.2B	2025-12-31	2026-03-13	10-K	26-000010
4	operating income	us-gaap:OperatingIncomeLoss	$159.0M	2025-12-31	2026-03-13	10-K	26-000010
5	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$68.8M	2025-12-31	2026-03-13	10-K	26-000010
6	income tax	us-gaap:IncomeTaxExpenseBenefit	$38.3M	2025-12-31	2026-03-13	10-K	26-000010
7	total debt	us-gaap:LongTermDebt	$1.3B	2025-12-31	2026-03-13	10-K	26-000010
8	book equity	us-gaap:StockholdersEquity	$758.4M	2025-12-31	2026-03-13	10-K	26-000010
9	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$104.5M	2025-12-31	2026-03-13	10-K	26-000010
10	total debt	us-gaap:LongTermDebt	$1.4B	2024-12-31	2026-03-13	10-K	26-000010
11	book equity	us-gaap:StockholdersEquity	$331.7M	2024-12-31	2026-03-13	10-K	26-000010
12	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$131.3M	2024-12-31	2026-03-13	10-K	26-000010
13	net income	us-gaap:NetIncomeLoss	$29.1M	2025-12-31	2026-03-13	10-K	26-000010
14	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$291.0M	2025-12-31	2026-03-13	10-K	26-000010
15	assets	us-gaap:Assets	$3.9B	2024-12-31	2026-03-13	10-K	26-000010
16	revenue	us-gaap:Revenues	$2.8B	2024-12-31	2026-03-13	10-K	26-000010
17	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$1.8B	2024-12-31	2026-03-13	10-K	26-000010
18	revenue	us-gaap:Revenues	$2.5B	2023-12-31	2026-03-13	10-K	26-000010
19	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$1.6B	2023-12-31	2026-03-13	10-K	26-000010
20	revenue	us-gaap:Revenues	$2.7B	2022-12-31	2025-03-11	10-K	25-000009
21	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$1.7B	2022-12-31	2025-03-11	10-K	25-000009
22	revenue	us-gaap:Revenues	$1.5B	2021-12-31	2024-03-11	10-K	24-000007
23	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$906.9M	2021-12-31	2024-03-11	10-K	24-000007
24	current assets	us-gaap:AssetsCurrent	$1.2B	2025-12-31	2026-03-13	10-K	26-000010
25	current liabilities	us-gaap:LiabilitiesCurrent	$1.5B	2025-12-31	2026-03-13	10-K	26-000010
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$32.9M	2025-12-31	2026-03-13	10-K	26-000010
27	liabilities	us-gaap:Liabilities	$3.4B	2025-12-31	2026-03-13	10-K	26-000010
28	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$171.2M	2025-12-31	2026-03-13	10-K	26-000010
29	interest expense	us-gaap:InterestAndDebtExpense	$96.4M	2025-12-31	2026-03-13	10-K	26-000010
30	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$43.7M	2025-12-31	2026-03-13	10-K	26-000010
31	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$142.9M	2024-12-31	2026-03-13	10-K	26-000010

Not investment advice. Informational and educational only. Data from SEC EDGAR, may contain errors, is not warranted. The grade ranks reported financial condition and is not a return forecast.

32	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$18.9M	2024-12-31	2026-03-13	10-K	26-000010
33	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$81.0M	2023-12-31	2026-03-13	10-K	26-000010
34	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$14.2M	2023-12-31	2026-03-13	10-K	26-000010
35	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$347.6M	2022-12-31	2025-03-11	10-K	25-000009
36	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$22.7M	2022-12-31	2025-03-11	10-K	25-000009
37	current assets	us-gaap:AssetsCurrent	$1.1B	2024-12-31	2026-03-13	10-K	26-000010
38	current liabilities	us-gaap:LiabilitiesCurrent	$1.4B	2024-12-31	2026-03-13	10-K	26-000010
39	assets	us-gaap:Assets	$3.8B	2023-12-31	2025-03-11	10-K	25-000009
40	assets	us-gaap:Assets	$4.0B	2022-12-31	2024-03-11	10-K	24-000007
41	shares outstanding	dei:EntityCommonStockSharesOutstanding	253,452,554	2026-03-05	2026-03-13	10-K	26-000010

Not investment advice. Informational and educational only. Data from SEC EDGAR, may contain errors, is not warranted. The grade ranks reported financial condition and is not a return forecast.