Foster L B Co.

FSTR

Nasdaq; shops; SIC 5051, Wholesale-Metals Service Centers & of fices; CIK 0000352825

C

middle fifth of 256 graded peers in shops

rank 129 of 256; percentile 50.2; sampling error 2.9 points; lower is stronger

A B C D E

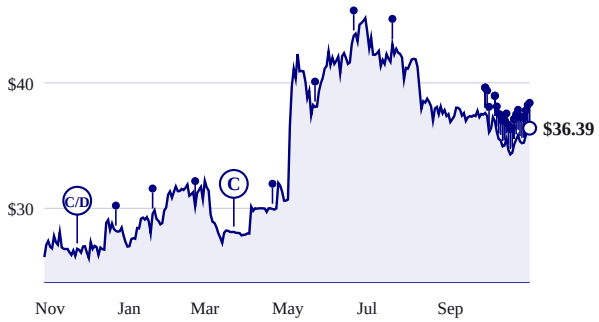
C, the tortoise



Scoreboard

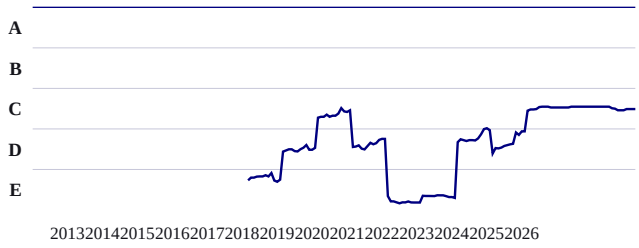
Profitability	C/D	percentile 57.7
Solvency	B	percentile 36.3
Growth and financing	C	percentile 53.4
Reliability	0.87 AUC	filers with $120M to $591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025
Peer failure rate	1.03% a year	Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$120M to $591M assets	total assets $330.4M
Standard universe	inside	revenue above $1M and assets above $10M
Warnings	none triggered	not computable: distress
Inputs computable	10 of 14	
Graded from	filings received through Mar 5, 2026	239 days before the rescan; latest periodic filing 10-Q received Aug 10, 2026
Last close	$37.04	2026-10-29; market equity $389.7M; 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 5, 2026

Founded in 1902, L.B. Foster Company is a Pennsylvania corporation with its principal office in Pittsburgh, PA. L.B. Foster Company is a global technology solutions provider of engineered, manufactured products and services that builds and supports infrastructure. The Company's innovative engineering and product development solutions address the safety, reliability, and performance needs of its customers' most challenging requirements. The Company maintains locations in North America, South America, Europe, and Asia. As used herein, "L.B. Foster," the "Company," "we," "us," and "our" or similar references refer collectively to L.B.

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 57.7						
Gross profitability	34.4%	42.0%		60.7	240	2025-12-31
Return on invested capital	4.3%	10.9%		74.7	84	2025-12-31

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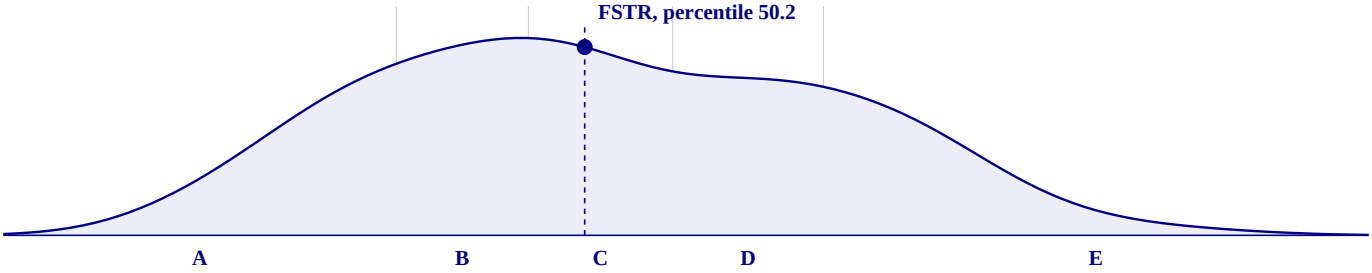
Accruals ratio	(8.4%)	(4.8%)	28.9	285	2025-12-31
Gross margin stability, five years	2.0 pts	1.2 pts	66.4	218	2025-12-31
Solvency, sleeve percentile 36.3					
Twelve-month failure probability	not computable	0.04%			
liabilities and a nearby cover-page share count are required at 2026-06-30					
Altman Z double-prime	not computable	1.93			
one or more required annual facts are missing					
Net debt to EBITDA	1.11x	1.84x	42.4	100	2025-12-31
Interest coverage	not computable	2.28x			
latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31					
Current ratio	1.87x	1.38x	30.1	293	2025-12-31
Growth and financing, sleeve percentile 53.4					
Revenue growth, three-year compound	2.8%	1.6%	42.9	267	2025-12-31
Free cash flow growth, three-year compound	not computable	5.2%			
current FCF must be positive and base FCF must exceed $100,000					
Reinvestment rate	(25.6%)	8.4%	78.1	152	2025-12-31
Asset growth, three years	(3.3%)	3.4%	74.3	270	2025-12-31
Net share issuance, one year	(4.1%)	(0.6%)	18.4	208	2026-02-27

Among 256 peers

shops; 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
124	Group 1 Automotive Inc. (GPI)	48.2	C	
125	Lowes Companies Inc. (LOW)	48.6	C	
126	Boise Cascade Co. (BCC)	49.0	C	
127	Scansource, Inc. (SCSC)	49.4	C	fortress balance sheet
128	Reliance, Inc. (RS)	49.8	C	
129	Foster L B Co. (FSTR)	50.2	C	
130	TD Synnex Corp. (SNX)	50.6	C	
131	Titan Machinery Inc. (TITN)	51.0	C	fortress balance sheet
132	Bath & Body Works, Inc. (BBWI)	51.4	C	
133	Mckesson Corp. (MCK)	51.8	C	
134	Darden Restaurants Inc. (DRI)	52.2	C	

What the price implies

at the 2026-10-29 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	39.2%	0.7%	84
Distance from 52-week high	(19.4%)	(19.4%)	50
EBIT to enterprise value	5.2%	5.2%	49
Free cash flow yield	6.6%	3.9%	70
Book value to price	0.47	0.35	59

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Sales to price	1.41	1.59	45
Composite equity issuance, five years	(2.1%)	(16.8%)	77
Relative strength against the sector, log excess return	0.35	0.03	84

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 6 of 9, period end 2025-12-31	
Return on assets above zero	pass
Operating cash flow above zero	pass
Return on assets improved	fail
Operating cash flow exceeds net income	pass
Long-term leverage fell	pass
Current ratio improved	pass
No new shares issued	pass
Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$5.8M
Operating cash flow, four quarters	$58.8M
Months of runway	not finite
Days since last periodic filing	81 (10-Q received Aug 10, 2026)
Median daily dollar volume, 63 sessions	$1.7M

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	$113.8M	2025-12-31	2026-03-05	10-K	26-000016
2	assets	us-gaap:Assets	$330.4M	2025-12-31	2026-03-05	10-K	26-000016
3	operating income	us-gaap:OperatingIncomeLoss	$21.9M	2025-12-31	2026-03-05	10-K	26-000016
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$17.4M	2025-12-31	2026-03-05	10-K	26-000016
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$10.0M	2025-12-31	2026-03-05	10-K	26-000016
6	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$42.6M	2025-12-31	2026-03-05	10-K	26-000016
7	book equity	us-gaap:StockholdersEquity	$175.3M	2025-12-31	2026-03-05	10-K	26-000016
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$4.3M	2025-12-31	2026-03-05	10-K	26-000016
9	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$46.8M	2024-12-31	2026-03-05	10-K	26-000016
10	book equity	us-gaap:StockholdersEquity	$178.3M	2024-12-31	2026-03-05	10-K	26-000016
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$2.5M	2024-12-31	2026-03-05	10-K	26-000016
12	net income	us-gaap:NetIncomeLoss	$7.5M	2025-12-31	2026-03-05	10-K	26-000016
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$35.6M	2025-12-31	2026-03-05	10-K	26-000016
14	assets	us-gaap:Assets	$334.6M	2024-12-31	2026-03-05	10-K	26-000016
15	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$540.0M	2025-12-31	2026-03-05	10-K	26-000016
16	gross profit	us-gaap:GrossProfit	$118.1M	2024-12-31	2026-03-05	10-K	26-000016
17	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$530.8M	2024-12-31	2026-03-05	10-K	26-000016
18	gross profit	us-gaap:GrossProfit	$112.0M	2023-12-31	2025-03-07	10-K	25-000055
19	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$543.7M	2023-12-31	2025-03-07	10-K	25-000055
20	gross profit	us-gaap:GrossProfit	$89.6M	2022-12-31	2024-11-01	10-K/A	24-000206
21	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$497.5M	2022-12-31	2024-11-01	10-K/A	24-000206
22	gross profit	us-gaap:GrossProfit	$86.3M	2021-12-31	2023-03-10	10-K	23-000034
23	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$513.6M	2021-12-31	2023-03-10	10-K	23-000034
24	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$12.5M	2025-12-31	2026-03-05	10-K	26-000016
25	operating income	us-gaap:OperatingIncomeLoss	$9.1M	2023-12-31	2025-03-07	10-K	25-000055
26	interest expense	us-gaap:InterestExpense	$5.5M	2023-12-31	2024-11-01	10-K/A	24-000206
27	current assets	us-gaap:AssetsCurrent	$156.9M	2025-12-31	2026-03-05	10-K	26-000016

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28	current liabilities	us-gaap:LiabilitiesCurrent	$83.9M	2025-12-31	2026-03-05	10-K	26-000016
29	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$10.4M	2025-12-31	2026-03-05	10-K	26-000016
30	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$22.6M	2024-12-31	2026-03-05	10-K	26-000016
31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$9.8M	2024-12-31	2026-03-05	10-K	26-000016
32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$37.0M	2023-12-31	2025-03-07	10-K	25-000055
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$4.5M	2023-12-31	2025-03-07	10-K	25-000055
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesC...	-$10.6M	2022-12-31	2023-03-10	10-K	23-000034
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$7.6M	2022-12-31	2024-11-01	10-K/A	24-000206
36	current assets	us-gaap:AssetsCurrent	$161.6M	2024-12-31	2026-03-05	10-K	26-000016
37	current liabilities	us-gaap:LiabilitiesCurrent	$88.3M	2024-12-31	2026-03-05	10-K	26-000016
38	assets	us-gaap:Assets	$312.4M	2023-12-31	2025-03-07	10-K	25-000055
39	assets	us-gaap:Assets	$365.3M	2022-12-31	2024-11-01	10-K/A	24-000206
40	shares outstanding	dei:EntityCommonStockSharesOutstanding	10,307,374	2026-02-27	2026-03-05	10-K	26-000016
41	shares outstanding	dei:EntityCommonStockSharesOutstanding	10,752,633	2025-02-27	2025-03-07	10-K	25-000055

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