# Hackett Group, Inc.

**HCKT**

Nasdaq; other; SIC 8742, Services-Management Consulting Services; CIK 0001057379

**A**

**strongest fifth of 336 graded peers in other**

rank 32 of 336; percentile 9.3; sampling error 2.6 points; lower is stronger

A B C D E

**A, the bull**



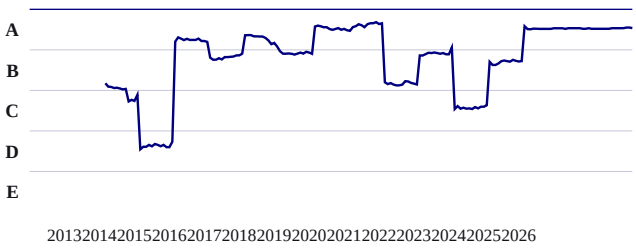
| Scoreboard | |
|---|---|
| **Profitability** | B<br>percentile 34.5 |
| **Solvency** | B<br>percentile 23.6 |
| **Growth and financing** | B/C<br>percentile 42.3 |
| **Reliability** | 0.87 AUC<br>filers with $120M to $591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025 |
| **Peer failure rate** | 1.03% a year<br>Item 1.03 bankruptcies, same asset band, 2012 to 2025 |
| **Size band** | $120M to $591M assets<br>total assets $206.4M |
| **Standard universe** | inside<br>revenue above $1M and assets above $10M |
| **Warnings** | none triggered; fortress balance sheet<br>not computable: distress |
| **Inputs computable** | 11 of 14 |
| **Graded from** | filings received through Feb 27, 2026<br>245 days before the rescan; latest periodic filing 10-Q received Aug 5, 2026 |
| **Last close** | $12.60<br>2026-10-29; market equity $313.3M; 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 27, 2026*

In this Annual Report on Form 10-K, unless the context otherwise requires, "The Hackett Group," "Hackett," the "Company," "we," "us," and "our" refer to The Hackett Group, Inc. and its subsidiaries and predecessors. We were originally incorporated on April 23, 1997. The Hackett Group, Inc. (NASDAQ: HCKT) is a global, IP platform-based generative artificial intelligence ("Gen AI") strategic advisory, business transformation, and enterprise application implementation firm.

## 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 34.5** | | | | | | |
| Gross profitability | 56.8% | 27.0% | | 12.9 | 287 | 2025-12-26 |
| Return on invested capital | not computable | 10.0% | | | | |
| *latest aligned inputs end 2018-12-28; latest annual assets end 2025-12-26* | | | | | | |
| Accruals ratio | (13.7%) | (5.8%) | | 18.5 | 503 | 2025-12-26 |

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.

| | | | | | |
|---|---|---|---|---|---|
| Gross margin stability, five years | 4.5 pts | 2.2 pts | 72.1 | 205 | 2025-12-26 |
| **Solvency, sleeve percentile 23.6** | | | | | |
| 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 | 3.64 | 2.05 | 24.5 | 385 | 2025-12-26 |
| Net debt to EBITDA | not computable | 2.52x | | | |
| *latest aligned inputs end 2018-12-28; latest annual assets end 2025-12-26* | | | | | |
| Interest coverage | 13.71x | 2.45x | 12.6 | 88 | 2025-12-26 |
| Current ratio | 1.72x | 1.32x | 33.8 | 507 | 2025-12-26 |
| **Growth and financing, sleeve percentile 42.3** | | | | | |
| Revenue growth, three-year compound | 1.3% | 5.0% | 63.9 | 400 | 2025-12-26 |
| Free cash flow growth, three-year compound | (15.8%) | 8.7% | 75.9 | 221 | 2025-12-26 |
| Reinvestment rate | 104.4% | 11.6% | 14.7 | 191 | 2025-12-26 |
| Asset growth, three years | 3.7% | 4.2% | 52.1 | 437 | 2025-12-26 |
| Net share issuance, one year | (8.7%) | (0.5%) | 4.8 | 353 | 2026-02-23 |

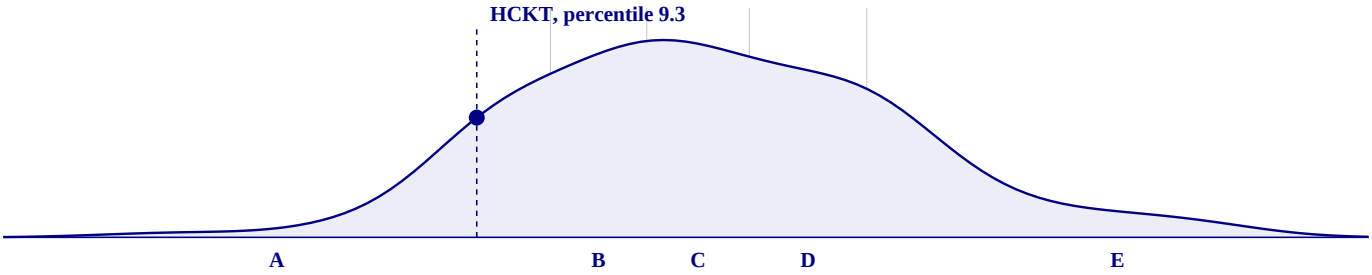
## Warnings

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

| Check | Measured |
|---|---|
| Fortress balance sheet | cash minus debt is 7,308,000 USD; Altman Z is not used |

## Among 336 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 |
|---|---|---|---|---|
| 27 | Southern Copper (SCCO) | 7.8 | A | |
| 28 | Genpact Ltd. (G) | 8.1 | A | |
| 29 | Moodys Corp. (MCO) | 8.4 | A | |
| 30 | Legacy Education Inc. (LGCY) | 8.7 | A | fortress balance sheet |
| 31 | Installed Building Products, Inc. (IBP) | 9.0 | A | |
| 32 | Hackett Group, Inc. (HCKT) | 9.3 | A | fortress balance sheet |
| 33 | Cavco Industries, Inc. (CVCO) | 9.6 | A | |
| 34 | Hecla Mining (HL) | 10.0 | A | |
| 35 | Hecla Mining (HL-PB) | 10.0 | A | |
| 36 | Mastech Digital, Inc. (MHH) | 10.4 | A | |
| 37 | Kforce Inc. (KFRC) | 10.7 | A | |

## 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 | (40.1%) | 2.0% | 14 |
| Distance from 52-week high | (38.7%) | (24.2%) | 31 |
| EBIT to enterprise value | 7.8% | 4.3% | 79 |

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| | | | |
|---|---|---|---|
| Free cash flow yield | 10.3% | 4.1% | 85 |
| Book value to price | 0.22 | 0.33 | 36 |
| Sales to price | 0.97 | 0.70 | 61 |
| Composite equity issuance, five years | (32.0%) | (8.8%) | 13 |
| Relative strength against the sector, log excess return | (0.66) | (0.13) | 14 |

## Diagnostics

*shown on every report; none enters the grade*

| Measure | Value |
|---|---|
| **Piotroski F-score 5 of 9, period end 2025-12-26** | |
| 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 | fail |
| Current ratio improved | pass |
| No new shares issued | pass |
| Gross margin improved | fail |
| Asset turnover improved | fail |
| **Cash, filings, liquidity** | |
| Cash and equivalents | $14.2M |
| Operating cash flow, four quarters | $40.6M |
| Months of runway | not finite |
| Days since last periodic filing | 86 (10-Q received Aug 5, 2026) |
| Median daily dollar volume, 63 sessions | $2.2M |

## 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:RevenueFromContractWithCustomerExcludingA... | $305.6M | 2025-12-26 | 2026-02-27 | 10-K | 26-082863 |
| 2 | cost of revenue | us-gaap:CostOfGoodsAndServicesSold | $188.5M | 2025-12-26 | 2026-02-27 | 10-K | 26-082863 |
| 3 | assets | us-gaap:Assets | $206.4M | 2025-12-26 | 2026-02-27 | 10-K | 26-082863 |
| 4 | operating income | us-gaap:OperatingIncomeLoss | $33.6M | 2018-12-28 | 2021-03-12 | 10-K | 21-012796 |
| 5 | pretax income | us-gaap:IncomeLossFromContinuingOperationsBeforeInc... | $32.9M | 2018-12-28 | 2021-03-12 | 10-K | 21-012796 |
| 6 | income tax | us-gaap:IncomeTaxExpenseBenefit | $5.6M | 2018-12-28 | 2021-03-12 | 10-K | 21-012796 |
| 7 | total debt | us-gaap:LongTermDebt | $6.5M | 2018-12-28 | 2020-03-05 | 10-K | 20-008982 |
| 8 | book equity | us-gaap:StockholdersEquity | $123.6M | 2018-12-28 | 2022-03-04 | 10-K | 22-008703 |
| 9 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $13.8M | 2018-12-28 | 2020-03-05 | 10-K | 20-008982 |
| 10 | total debt | us-gaap:LongTermDebt | $19.0M | 2017-12-29 | 2019-03-08 | 10-K | 19-007043 |
| 11 | book equity | us-gaap:StockholdersEquity | $107.3M | 2017-12-29 | 2021-03-12 | 10-K | 21-012796 |
| 12 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $17.5M | 2017-12-29 | 2019-03-08 | 10-K | 19-007043 |
| 13 | net income | us-gaap:NetIncomeLoss | $12.9M | 2025-12-26 | 2026-02-27 | 10-K | 26-082863 |
| 14 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $40.3M | 2025-12-26 | 2026-02-27 | 10-K | 26-082863 |
| 15 | assets | us-gaap:Assets | $193.3M | 2024-12-27 | 2026-02-27 | 10-K | 26-082863 |
| 16 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $313.9M | 2024-12-27 | 2026-02-27 | 10-K | 26-082863 |
| 17 | cost of revenue | us-gaap:CostOfGoodsAndServicesSold | $190.6M | 2024-12-27 | 2026-02-27 | 10-K | 26-082863 |
| 18 | gross profit | us-gaap:GrossProfit | $84.4M | 2023-12-29 | 2024-03-01 | 10-K | 24-023702 |
| 19 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $296.6M | 2023-12-29 | 2026-02-27 | 10-K | 26-082863 |
| 20 | gross profit | us-gaap:GrossProfit | $89.5M | 2022-12-30 | 2024-03-01 | 10-K | 24-023702 |
| 21 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $293.7M | 2022-12-30 | 2025-02-28 | 10-K | 25-030037 |
| 22 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $278.8M | 2021-12-31 | 2024-03-01 | 10-K | 24-023702 |
| 23 | cost of revenue | us-gaap:CostOfGoodsAndServicesSold | $173.1M | 2021-12-31 | 2024-03-01 | 10-K | 24-023702 |
| 24 | current assets | us-gaap:AssetsCurrent | $83.9M | 2025-12-26 | 2026-02-27 | 10-K | 26-082863 |
| 25 | current liabilities | us-gaap:LiabilitiesCurrent | $48.8M | 2025-12-26 | 2026-02-27 | 10-K | 26-082863 |

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| | | | | | | | |
|---|---|---|---|---|---|---|---|
| 26 | retained earnings | us-gaap:RetainedEarningsAccumulatedDeficit | $78.4M | 2025-12-26 | 2026-02-27 | 10-K | 26-082863 |
| 27 | operating income | us-gaap:OperatingIncomeLoss | $23.5M | 2025-12-26 | 2026-02-27 | 10-K | 26-082863 |
| 28 | book equity | us-gaap:StockholdersEquity | $68.1M | 2025-12-26 | 2026-02-27 | 10-K | 26-082863 |
| 29 | liabilities | us-gaap:Liabilities | $138.3M | 2025-12-26 | 2026-02-27 | 10-K | 26-082863 |
| 30 | depreciation amortization | us-gaap:Depreciation | $2.5M | 2018-12-28 | 2021-03-12 | 10-K | 21-012796 |
| 31 | interest expense | us-gaap:InterestExpense | $1.7M | 2025-12-26 | 2026-02-27 | 10-K | 26-082863 |
| 32 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $7.9M | 2025-12-26 | 2026-02-27 | 10-K | 26-082863 |
| 33 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $47.7M | 2024-12-27 | 2026-02-27 | 10-K | 26-082863 |
| 34 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $4.1M | 2024-12-27 | 2026-02-27 | 10-K | 26-082863 |
| 35 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $37.4M | 2023-12-29 | 2026-02-27 | 10-K | 26-082863 |
| 36 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $4.1M | 2023-12-29 | 2026-02-27 | 10-K | 26-082863 |
| 37 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $58.9M | 2022-12-30 | 2025-02-28 | 10-K | 25-030037 |
| 38 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $4.7M | 2022-12-30 | 2025-02-28 | 10-K | 25-030037 |
| 39 | depreciation amortization | us-gaap:DepreciationDepletionAndAmortization | $5.2M | 2025-12-26 | 2026-02-27 | 10-K | 26-082863 |
| 40 | pretax income | us-gaap:IncomeLossFromContinuingOperationsBeforeInc... | $21.8M | 2025-12-26 | 2026-02-27 | 10-K | 26-082863 |
| 41 | income tax | us-gaap:IncomeTaxExpenseBenefit | $8.9M | 2025-12-26 | 2026-02-27 | 10-K | 26-082863 |
| 42 | current assets | us-gaap:AssetsCurrent | $76.3M | 2024-12-27 | 2026-02-27 | 10-K | 26-082863 |
| 43 | current liabilities | us-gaap:LiabilitiesCurrent | $53.1M | 2024-12-27 | 2026-02-27 | 10-K | 26-082863 |
| 44 | assets | us-gaap:Assets | $181.4M | 2023-12-29 | 2025-02-28 | 10-K | 25-030037 |
| 45 | assets | us-gaap:Assets | $185.0M | 2022-12-30 | 2024-03-01 | 10-K | 24-023702 |
| 46 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 25,380,429 | 2026-02-23 | 2026-02-27 | 10-K | 26-082863 |
| 47 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 27,791,221 | 2025-02-24 | 2025-02-28 | 10-K | 25-030037 |

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