# RBC Bearings Inc.

**RBC**

NYSE; manufacturing; SIC 3562, Ball & Roller Bearings; CIK 0001324948

# C/D

**on the C/D boundary of 255 graded peers in manufacturing**

rank 146 of 255; percentile 57.1; sampling error 3.0 points; lower is stronger




**C/D, the tortoise**



## Scoreboard

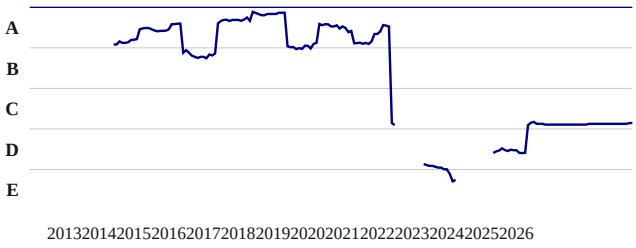
| | | |
|---|---|---|
| **Profitability** | C/D | percentile 60.5 |
| **Solvency** | B/C | percentile 41.8 |
| **Growth and financing** | C | percentile 50.2 |
| **Reliability** | 0.94 AUC | filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025 |
| **Peer failure rate** | 0.52% a year | Item 1.03 bankruptcies, same asset band, 2012 to 2025 |
| **Size band** | over $2.67B assets | total assets $5.1B |
| **Standard universe** | inside | revenue above $1M and assets above $10M |
| **Warnings** | none triggered | not computable: distress |
| **Inputs computable** | 11 of 14 | |
| **Graded from** | filings received through May 15, 2026 | 169 days before the rescan; latest periodic filing 10-Q received Oct 30, 2026 |
| **Last close** | $463.83 | 2026-10-30; market equity $14.7B; 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 May 15, 2026*

Bearings Incorporated, together with its subsidiaries, is an international manufacturer and marketer of highly engineered precision bearings, components and essential systems for the Industrial and Aerospace & Defense markets. Our precision solutions are integral to the manufacture and operation of most machines and mechanical systems, to reduce wear to moving parts, facilitate proper power transmission, reduce damage and energy loss caused by friction, and control pressure and flow. The terms "we," "us," "our," "RBC" and the "Company" mean RBC Bearings Incorporated and its subsidiaries, unless the context indicates another meaning.

## 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 60.5** | | | | | | |
| Gross profitability | 16.2% | 21.9% | | 66.9 | 276 | 2026-03-28 |
| Return on invested capital | 8.1% | 9.7% | | 60.4 | 102 | 2026-03-28 |
| Accruals ratio | (2.6%) | (3.6%) | | 59.2 | 307 | 2026-03-28 |

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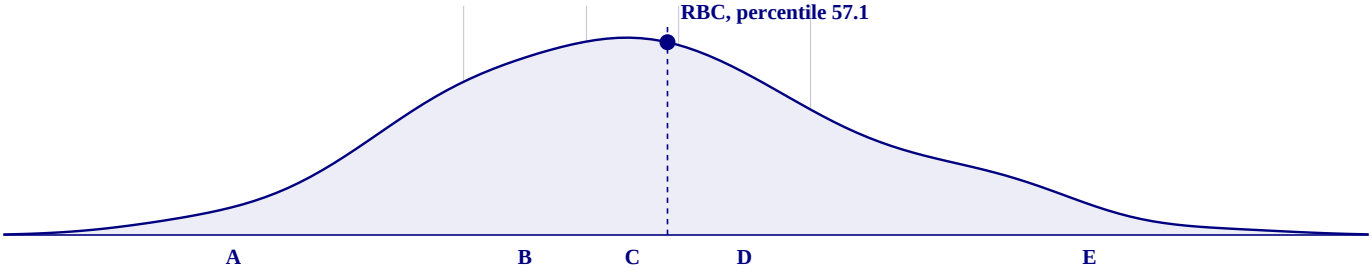
| | | | | | | |
|---|---|---|---|---|---|---|
| Gross margin stability, five years | 2.4 pts | 2.1 pts | | 55.7 | 229 | 2026-03-28 |
| **Solvency, sleeve percentile 41.8** | | | | | | |
| Twelve-month failure probability | not computable | 0.04% | | | | |
| *latest liabilities, cash plus short-term investments, book equity, and shares are required* | | | | | | |
| Altman Z double-prime | 4.49 | 3.66 | | 33.9 | 243 | 2026-03-28 |
| Net debt to EBITDA | 1.75x | 1.78x | | 50.0 | 121 | 2026-03-28 |
| Interest coverage | 8.45x | 5.09x | | 31.7 | 64 | 2026-03-28 |
| Current ratio | 2.18x | 2.25x | | 51.7 | 324 | 2026-03-28 |
| **Growth and financing, sleeve percentile 50.2** | | | | | | |
| Revenue growth, three-year compound | 8.4% | 2.2% | | 26.9 | 269 | 2026-03-28 |
| Free cash flow growth, three-year compound | not computable | 13.5% | | | | |
| *latest aligned inputs end 2023-04-01; latest annual assets end 2026-03-28* | | | | | | |
| Reinvestment rate | not computable | 26.1% | | | | |
| *latest aligned inputs end 2023-04-01; latest annual assets end 2026-03-28* | | | | | | |
| Asset growth, three years | 3.0% | 4.3% | | 55.4 | 277 | 2026-03-28 |
| Net share issuance, one year | 0.5% | 0.01% | | 68.3 | 241 | 2026-05-08 |

## Among 255 peers

*manufacturing; 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 |
|---|---|---|---|---|
| 141 | Timken Co. (TKR) | 55.1 | C | |
| 142 | Dover Corp. (DOV) | 55.5 | C | |
| 143 | nVent Electric plc (NVT) | 55.9 | C | |
| 144 | Pentair plc (PNR) | 56.3 | C | |
| 145 | Trio-Tech International (TRT) | 56.7 | C | fortress balance sheet |
| 146 | RBC Bearings Inc. (RBC) | 57.1 | C/D | |
| 147 | Kaiser Aluminum Corp. (KALU) | 57.5 | C/D | fortress balance sheet |
| 148 | Steel Dynamics Inc. (STLD) | 57.9 | C/D | |
| 149 | Northern Technologies International Corp. (NTIC) | 58.3 | C/D | |
| 150 | Insteel Industries Inc. (IIIN) | 58.7 | C/D | |
| 151 | Ingersoll Rand Inc. (IR) | 59.1 | C/D | |

## What the price implies

*at the 2026-10-30 close; none of these enters the grade*

| Measure | Value | Peer median | Percentile |
|---|---|---|---|
| Twelve-month price change, skipping the latest month | 26.6% | 13.7% | 62 |
| Distance from 52-week high | (28.8%) | (26.2%) | 47 |
| EBIT to enterprise value | 2.8% | 4.2% | 37 |
| Free cash flow yield | 1.2% | 3.5% | 27 |
| Book value to price | 0.24 | 0.36 | 31 |
| Sales to price | 0.13 | 0.53 | 7 |
| Composite equity issuance, five years | 22.7% | (9.6%) | 83 |

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| | | | |
|---|---|---|---|
| Relative strength against the sector, log excess return | 0.10 | (0.00) | 62 |

## Diagnostics

*shown on every report; none enters the grade*

| Measure | Value |
|---|---|
| **Piotroski F-score 6 of 9, period end 2026-03-28** | |
| 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 | fail |
| Asset turnover improved | pass |
| **Cash, filings, liquidity** | |
| Cash and equivalents | $89.3M |
| Operating cash flow, four quarters | $485.5M |
| Months of runway | not finite |
| Days since last periodic filing | 1 (10-Q received Oct 30, 2026) |
| Median daily dollar volume, 63 sessions | $135.4M |

## 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 | $830.2M | 2026-03-28 | 2026-05-15 | 10-K | 26-057626 |
| 2 | assets | us-gaap:Assets | $5.1B | 2026-03-28 | 2026-05-15 | 10-K | 26-057626 |
| 3 | operating income | us-gaap:OperatingIncomeLoss | $421.0M | 2026-03-28 | 2026-05-15 | 10-K | 26-057626 |
| 4 | pretax income | us-gaap:IncomeLossFromContinuingOperationsBeforeInc... | $369.3M | 2026-03-28 | 2026-05-15 | 10-K | 26-057626 |
| 5 | income tax | us-gaap:IncomeTaxExpenseBenefit | $81.7M | 2026-03-28 | 2026-05-15 | 10-K | 26-057626 |
| 6 | total debt | us-gaap:LongTermDebt | $875.5M | 2026-03-28 | 2026-05-15 | 10-K | 26-057626 |
| 7 | book equity | us-gaap:StockholdersEquity | $3.4B | 2026-03-28 | 2026-05-15 | 10-K | 26-057626 |
| 8 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $57.3M | 2026-03-28 | 2026-05-15 | 10-K | 26-057626 |
| 9 | total debt | us-gaap:LongTermDebt | $920.1M | 2025-03-29 | 2026-05-15 | 10-K | 26-057626 |
| 10 | book equity | us-gaap:StockholdersEquity | $3.0B | 2025-03-29 | 2026-05-15 | 10-K | 26-057626 |
| 11 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $36.8M | 2025-03-29 | 2026-05-15 | 10-K | 26-057626 |
| 12 | net income | us-gaap:NetIncomeLoss | $287.6M | 2026-03-28 | 2026-05-15 | 10-K | 26-057626 |
| 13 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $415.7M | 2026-03-28 | 2026-05-15 | 10-K | 26-057626 |
| 14 | assets | us-gaap:Assets | $4.7B | 2025-03-29 | 2026-05-15 | 10-K | 26-057626 |
| 15 | revenue | us-gaap:Revenues | $1.9B | 2026-03-28 | 2026-05-15 | 10-K | 26-057626 |
| 16 | gross profit | us-gaap:GrossProfit | $726.1M | 2025-03-29 | 2026-05-15 | 10-K | 26-057626 |
| 17 | revenue | us-gaap:Revenues | $1.6B | 2025-03-29 | 2026-05-15 | 10-K | 26-057626 |
| 18 | gross profit | us-gaap:GrossProfit | $670.5M | 2024-03-30 | 2026-05-15 | 10-K | 26-057626 |
| 19 | revenue | us-gaap:Revenues | $1.6B | 2024-03-30 | 2026-05-15 | 10-K | 26-057626 |
| 20 | gross profit | us-gaap:GrossProfit | $604.8M | 2023-04-01 | 2025-05-16 | 10-K | 25-044893 |
| 21 | revenue | us-gaap:Revenues | $1.5B | 2023-04-01 | 2025-05-16 | 10-K | 25-044893 |
| 22 | gross profit | us-gaap:GrossProfit | $357.1M | 2022-04-30 | 2022-08-05 | 10-K/A | 22-045106 |
| 23 | revenue | us-gaap:Revenues | $942.9M | 2022-04-30 | 2022-08-05 | 10-K/A | 22-045106 |
| 24 | current assets | us-gaap:AssetsCurrent | $1.2B | 2026-03-28 | 2026-05-15 | 10-K | 26-057626 |
| 25 | current liabilities | us-gaap:LiabilitiesCurrent | $546.2M | 2026-03-28 | 2026-05-15 | 10-K | 26-057626 |
| 26 | retained earnings | us-gaap:RetainedEarningsAccumulatedDeficit | $1.7B | 2026-03-28 | 2026-05-15 | 10-K | 26-057626 |
| 27 | liabilities | us-gaap:Liabilities | $1.8B | 2026-03-28 | 2026-05-15 | 10-K | 26-057626 |
| 28 | depreciation amortization | us-gaap:Depreciation | $47.8M | 2026-03-28 | 2026-05-15 | 10-K | 26-057626 |
| 29 | interest expense | us-gaap:InterestExpense | -$49.8M | 2026-03-28 | 2026-05-15 | 10-K | 26-057626 |
| 30 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $220.6M | 2023-04-01 | 2025-05-16 | 10-K | 25-044893 |

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| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| 31 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $42.0M | 2023-04-01 | 2023-05-19 | 10-K | 23-041600 |
| 32 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $180.3M | 2022-04-02 | 2024-05-17 | 10-K | 24-044761 |
| 33 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $29.8M | 2022-04-02 | 2023-05-19 | 10-K | 23-041600 |
| 34 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $152.4M | 2021-04-03 | 2023-05-19 | 10-K | 23-041600 |
| 35 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $11.8M | 2021-04-03 | 2023-05-19 | 10-K | 23-041600 |
| 36 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $155.6M | 2020-03-28 | 2022-08-05 | 10-K/A | 22-045106 |
| 37 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $37.3M | 2020-03-28 | 2022-08-05 | 10-K/A | 22-045106 |
| 38 | depreciation amortization | us-gaap:DepreciationDepletionAndAmortization | $115.4M | 2023-04-01 | 2024-05-17 | 10-K | 24-044761 |
| 39 | operating income | us-gaap:OperatingIncomeLoss | $293.0M | 2023-04-01 | 2025-05-16 | 10-K | 25-044893 |
| 40 | pretax income | us-gaap:IncomeLossFromContinuingOperationsBeforeInc... | $209.7M | 2023-04-01 | 2025-05-16 | 10-K | 25-044893 |
| 41 | income tax | us-gaap:IncomeTaxExpenseBenefit | $43.0M | 2023-04-01 | 2025-05-16 | 10-K | 25-044893 |
| 42 | current assets | us-gaap:AssetsCurrent | $913.3M | 2023-04-01 | 2024-05-17 | 10-K | 24-044761 |
| 43 | current liabilities | us-gaap:LiabilitiesCurrent | $309.3M | 2023-04-01 | 2024-05-17 | 10-K | 24-044761 |
| 44 | current assets | us-gaap:AssetsCurrent | $962.2M | 2022-04-02 | 2023-05-19 | 10-K | 23-041600 |
| 45 | current liabilities | us-gaap:LiabilitiesCurrent | $313.5M | 2022-04-02 | 2023-05-19 | 10-K | 23-041600 |
| 46 | assets | us-gaap:Assets | $4.7B | 2024-03-30 | 2026-05-15 | 10-K | 26-057626 |
| 47 | assets | us-gaap:Assets | $4.7B | 2023-04-01 | 2025-05-16 | 10-K | 25-044893 |
| 48 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 31,635,359 | 2026-05-08 | 2026-05-15 | 10-K | 26-057626 |
| 49 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 31,478,058 | 2025-05-09 | 2025-05-16 | 10-K | 25-044893 |

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