Bgsf, Inc.

BGSF

NYSE; other; SIC 7363, Services-Help Supply Services; CIK 0001474903

B/C

on the B/C boundary of 335 graded peers in other

rank 143 of 335; percentile 42.5; sampling error 2.6 points; lower is stronger

A B C D E

B/C, the elk



Scoreboard

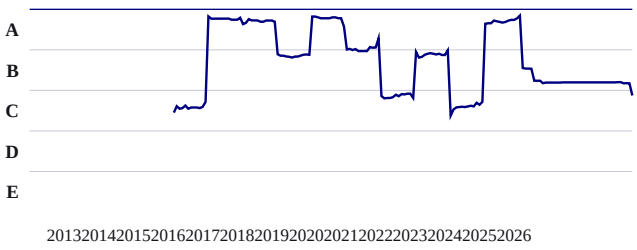
Profitability	B percentile 27.3
Solvency	A/B percentile 20.3
Growth and financing	E percentile 87.8
Reliability	0.83 AUC filers with $12.5M to $120M assets; 95% interval 0.79 to 0.86; 201 events, 2020 to 2025
Peer failure rate	1.07% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$12.5M to $120M assets total assets $57.8M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	late filer
Inputs computable	9 of 14
Graded from	filings received through Mar 30, 2026 216 days before the rescan; latest periodic filing 10-Q received Aug 5, 2026
Last close	$4.56 2026-10-26; market equity $48.7M; 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 30, 2026

BGSF, Inc. ("BGSF," "we," or the "Company") is a leading national provider of staffing and workforce solutions for the Property Management industry. We operate primarily within the U.S. through our Property Management segment, which provides maintenance and office field talent across 44 of the states and D.C. to property management companies responsible for the apartment communities and commercial buildings day to day operations. We provide field talent to a variety of client partners that are seeking to match their workforce requirements to their business needs.

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 27.3						
Gross profitability	57.6%	27.0%		11.9	287	2025-12-28
Return on invested capital	not computable	10.0%				

latest aligned inputs end 2015-12-27; latest annual assets end 2025-12-28

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Accruals ratio	(11.1%)	(5.8%)	22.2	500	2025-12-28
Gross margin stability, five years	2.1 pts	2.2 pts	47.8	204	2025-12-28
Solvency, sleeve percentile 20.3					
Twelve-month failure probability	0.04%	0.04%	40.9	45	2026-06-28
Altman Z double-prime	6.23	2.06	10.4	384	2025-12-28
Net debt to EBITDA	not computable	2.52x			
latest aligned inputs end 2015-12-27; latest annual assets end 2025-12-28					
Interest coverage	not computable	2.45x			
one or more required annual facts are missing					
Current ratio	4.12x	1.33x	9.5	505	2025-12-28
Growth and financing, sleeve percentile 87.8					
Revenue growth, three-year compound	(32.1%)	5.1%	97.7	397	2025-12-28
Free cash flow growth, three-year compound	not computable	8.9%			
current FCF must be positive and base FCF must exceed $100,000					
Reinvestment rate	not computable	11.9%			
NOPAT must exceed $100,000					
Asset growth, three years	(33.3%)	4.1%	98.2	434	2025-12-28
Net share issuance, one year	1.5%	(0.5%)	67.5	352	2026-03-11

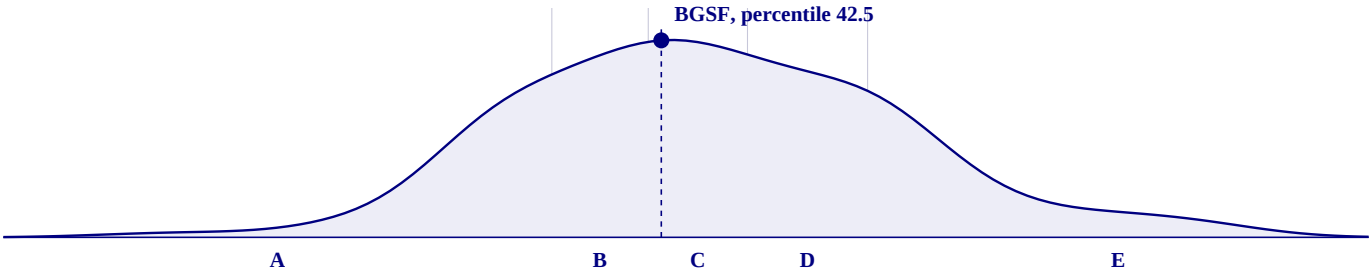
Warnings

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

Check	Measured
Late filer	found 1 NT 10-K/Q filings in the last eight quarters

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
138	Fluor Corp. (FLR)	41.0	B/C	
139	Bristow Group Inc. (VTOL)	41.3	B/C	
140	Graham Holdings Co. (GHC)	41.6	B/C	
141	Huron Consulting Group Inc. (HURN)	41.9	B/C	
142	Martin Marietta Materials Inc. (MLM)	42.2	B/C	
143	Bgsf, Inc. (BGSF)	42.5	B/C	late filer
144	NPK International Inc. (NPKI)	42.8	C	
145	V2X, Inc. (VVX)	43.1	C	
146	Werner Enterprises Inc. (WERN)	43.4	C	
147	Strategic Education, Inc. (STRA)	43.7	C	fortress balance sheet
148	TSS, Inc. (TSSI)	44.0	C	late filer, fortress balance sheet

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What the price implies

at the 2026-10-26 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	49.6%	(0.6%)	85
Distance from 52-week high	(35.6%)	(23.9%)	36
EBIT to enterprise value	(17.8%)	4.3%	6
Free cash flow yield	0.01%	4.1%	24
Book value to price	1.02	0.34	88
Sales to price	2.06	0.70	81
Composite equity issuance, five years	(43.9%)	(8.8%)	6
Relative strength against the sector, log excess return	0.28	(0.13)	85

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 5 of 9, period end 2025-12-28	
Return on assets above zero	fail
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	fail
Gross margin improved	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$9.7M
Operating cash flow, four quarters	-$3.2M
Months of runway	36.1
Days since last periodic filing	88 (10-Q received Aug 5, 2026)
Median daily dollar volume, 63 sessions	$34,549

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	$33.3M	2025-12-28	2026-03-30	10-K	26-000030
2	assets	us-gaap:Assets	$57.8M	2025-12-28	2026-03-30	10-K	26-000030
3	operating income	us-gaap:OperatingIncomeLoss	$12.0M	2015-12-27	2018-03-08	10-K	18-000011
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$8.7M	2015-12-27	2018-03-08	10-K	18-000011
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$3.4M	2015-12-27	2018-03-08	10-K	18-000011
6	total debt	us-gaap:LongTermDebt	$14.6M	2015-12-27	2016-03-07	10-K	16-000092
7	book equity	us-gaap:StockholdersEquity	$25.9M	2015-12-27	2019-03-12	10-K	19-000010
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$0	2015-12-27	2019-03-12	10-K	19-000010
9	total debt	us-gaap:LongTermDebt	$16.9M	2014-12-28	2016-03-07	10-K	16-000092
10	book equity	us-gaap:StockholdersEquity	$16.4M	2014-12-28	2018-03-08	10-K	18-000011
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$0	2014-12-28	2018-03-08	10-K	18-000011
12	net income	us-gaap:NetIncomeLoss	-$11.4M	2025-12-28	2026-03-30	10-K	26-000030
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$142,000	2025-12-28	2026-03-30	10-K	26-000030
14	assets	us-gaap:Assets	$150.1M	2024-12-29	2026-03-30	10-K	26-000030
15	revenue	us-gaap:Revenues	$93.3M	2025-12-28	2026-03-30	10-K	26-000030
16	gross profit	us-gaap:GrossProfit	$38.4M	2024-12-29	2026-03-30	10-K	26-000030
17	revenue	us-gaap:Revenues	$104.4M	2024-12-29	2026-03-30	10-K	26-000030
18	gross profit	us-gaap:GrossProfit	$49.8M	2023-12-31	2026-03-30	10-K	26-000030

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19	revenue	us-gaap:Revenues	$125.1M	2023-12-31	2026-03-30	10-K	26-000030
20	gross profit	us-gaap:GrossProfit	$103.5M	2023-01-01	2025-03-17	10-K	25-000016
21	revenue	us-gaap:Revenues	$298.4M	2023-01-01	2025-03-17	10-K	25-000016
22	gross profit	us-gaap:GrossProfit	$80.9M	2021-12-26	2024-03-15	10-K	24-000026
23	revenue	us-gaap:Revenues	$239.0M	2021-12-26	2024-03-15	10-K	24-000026
24	current assets	us-gaap:AssetsCurrent	$38.5M	2025-12-28	2026-03-30	10-K	26-000030
25	current liabilities	us-gaap:LiabilitiesCurrent	$9.3M	2025-12-28	2026-03-30	10-K	26-000030
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$21.9M	2025-12-28	2026-03-30	10-K	26-000030
27	operating income	us-gaap:OperatingIncomeLoss	-$8.9M	2025-12-28	2026-03-30	10-K	26-000030
28	book equity	us-gaap:StockholdersEquity	$48.1M	2025-12-28	2026-03-30	10-K	26-000030
29	liabilities	us-gaap:Liabilities	$9.7M	2025-12-28	2026-03-30	10-K	26-000030
30	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$5.5M	2015-12-27	2016-03-07	10-K	16-000092
31	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$138,000	2025-12-28	2026-03-30	10-K	26-000030
32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$24.4M	2024-12-29	2026-03-30	10-K	26-000030
33	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$1.2M	2024-12-29	2026-03-30	10-K	26-000030
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$20.4M	2023-12-31	2026-03-30	10-K	26-000030
35	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$2.2M	2023-12-31	2026-03-30	10-K	26-000030
36	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$7.1M	2023-01-01	2025-03-17	10-K	25-000016
37	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$5.7M	2023-01-01	2025-03-17	10-K	25-000016
38	depreciation amortization	us-gaap:Depreciation	$113,000	2025-12-28	2026-03-30	10-K	26-000030
39	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$13.4M	2025-12-28	2026-03-30	10-K	26-000030
40	income tax	us-gaap:IncomeTaxExpenseBenefit	-$1.3M	2025-12-28	2026-03-30	10-K	26-000030
41	current assets	us-gaap:AssetsCurrent	$45.3M	2024-12-29	2026-03-30	10-K	26-000030
42	current liabilities	us-gaap:LiabilitiesCurrent	$25.9M	2024-12-29	2026-03-30	10-K	26-000030
43	assets	us-gaap:Assets	$178.5M	2023-12-31	2025-03-17	10-K	25-000016
44	assets	us-gaap:Assets	$194.7M	2023-01-01	2024-03-15	10-K	24-000026
45	shares outstanding	dei:EntityCommonStockSharesOutstanding	11,243,967	2026-03-11	2026-03-30	10-K	26-000030
46	shares outstanding	dei:EntityCommonStockSharesOutstanding	11,077,007	2025-03-12	2025-03-17	10-K	25-000016

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