Stagwell Inc.

STGW

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

D/E

on the D/E boundary of 335 graded peers in other

rank 277 of 335; percentile 82.6; sampling error 2.6 points; lower is stronger

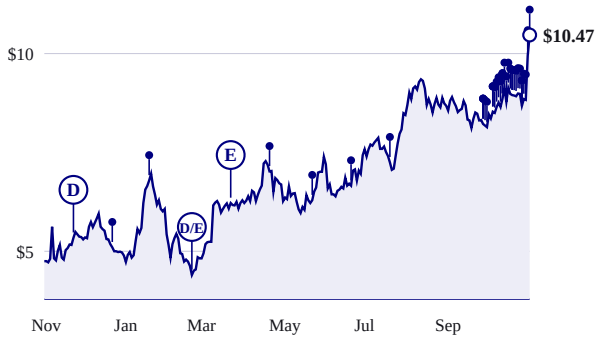


D/E, the sloth



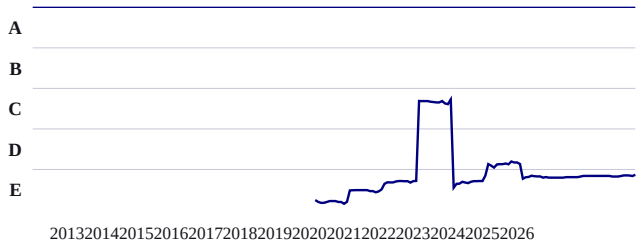
Scoreboard	
Profitability	C percentile 48.4
Solvency	D percentile 63.4
Growth and financing	D percentile 71.5
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size 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 233 days before the rescan; latest periodic filing 10-Q received Oct 29, 2026
Last close	$10.46 2026-10-30; market equity $2.6B; 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%)		45.7	500	2025-12-31
Gross margin stability, five years	1.2 pts	2.2 pts		24.6	204	2025-12-31

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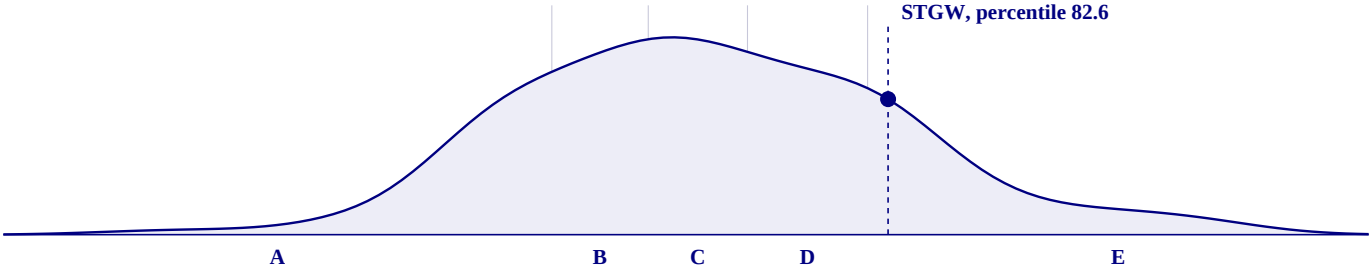
Solvency, sleeve percentile 63.4						
Twelve-month failure probability	not computable	0.04%				
liabilities and a nearby cover-page share count are required at 2025-12-31						
Altman Z double-prime	0.02	2.06	60.3	384	2025-12-31	
Net debt to EBITDA	3.70x	2.52x	65.2	182	2025-12-31	
Interest coverage	1.65x	2.45x	51.2	87	2025-12-31	
Current ratio	0.79x	1.33x	76.8	505	2025-12-31	
Growth and financing, sleeve percentile 71.5						
Revenue growth, three-year compound	2.7%	5.1%	57.8	397	2025-12-31	
Free cash flow growth, three-year compound	(8.7%)	8.9%	71.6	219	2025-12-31	
Reinvestment rate	(302.1%)	11.9%	96.3	190	2025-12-31	
Asset growth, three years	1.8%	4.1%	60.5	434	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
272	Allegiant Travel Co. (ALGT)	81.1	D/E	
273	Omnicom Group Inc. (OMC)	81.4	D/E	dilution
274	Seacor Marine Holdings Inc. (SMHI)	81.7	D/E	
275	NextTrip, Inc. (NTRP)	82.0	D/E	dilution, short runway
276	Access Newswire Inc. (ACCS)	82.3	D/E	
277	Stagwell Inc. (STGW)	82.6	D/E	
278	Delek Logistics Partners, L.P. (DKL)	82.9	E	
279	Travelzoo (TZOO)	83.2	E	
280	Repay Holdings Corp. (RPAY)	83.5	E	
281	Target Hospitality Corp. (TH)	83.8	E	late filer, fortress balance sheet
282	Addentax Group Corp. (ATXG)	84.1	E	dilution

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	71.4%	(0.6%)	92
Distance from 52-week high	0.0%	(23.9%)	96
EBIT to enterprise value	4.1%	4.3%	47
Free cash flow yield	9.5%	4.1%	83
Book value to price	0.27	0.34	40
Sales to price	1.12	0.70	63
Composite equity issuance, five years	not computable	(8.8%)	
Relative strength against the sector, log excess return	0.42	(0.13)	92

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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	$132.2M
Operating cash flow, four quarters	$412.6M
Months of runway	not finite
Days since last periodic filing	3 (10-Q received Oct 29, 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

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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

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