Verisign Inc/Ca

VRSN

Nasdaq; business equipment; SIC 7371, Services-Computer Programming Services; CIK 0001014473

B

second fifth of 496 graded peers in business equipment

rank 154 of 496; percentile 30.9; sampling error 2.2 points; lower is stronger

A B C D E

B, the elk



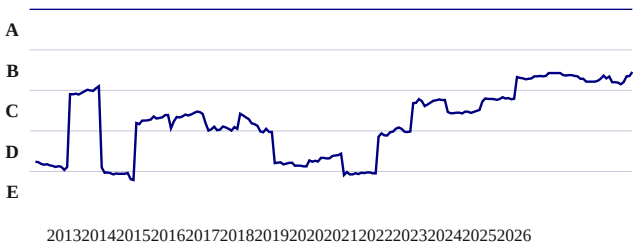
Scoreboard	
Profitability	A percentile 12.5
Solvency	D percentile 63.9
Growth and financing	C percentile 52.4
Reliability	0.91 AUC filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025
Peer failure rate	1.01% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$591M to $2.67B assets total assets $1.3B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered; fortress balance sheet
Inputs computable	11 of 14
Graded from	filings received through Feb 5, 2026 269 days before the rescan; latest periodic filing 10-Q received Oct 22, 2026
Last close	$306.65 2026-10-30; market equity $27.5B; 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 5, 2026

We are a global provider of critical internet infrastructure and domain name registry services, enabling internet navigation for many of the world's most recognized domain names. We help enable the security, stability, and resiliency of the Domain Name System ("DNS") and the internet by providing Root Zone Maintainer services, operating two of the thirteen global internet root servers, and providing registration services and authoritative resolution for the .com and .net top-level domains ("TLDs"), which support the majority of global e-commerce. We were incorporated in Delaware on April 12, 1995. Our principal executive offices are located at 12061 Bluemont Way, Reston, Virginia 20190.

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 12.5						
Gross profitability	110.1%	28.7%		1.4	554	2025-12-31
Return on invested capital	not computable	11.4%				

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pretax income must exceed the validity floor and imply a 0%-100% tax rate						
Accruals ratio	(19.4%)	(7.3%)		20.1	617	2025-12-31
Gross margin stability, five years	1.0 pts	2.3 pts		16.0	425	2025-12-31
Solvency, sleeve percentile 63.9						
Twelve-month failure probability	0.06%	0.05%		50.5	104	2026-09-30
Altman Z double-prime	(27.29)	2.15		92.9	564	2025-12-31
Net debt to EBITDA	not computable	1.09x				
latest aligned inputs end 2011-12-31; latest annual assets end 2025-12-31						
Interest coverage	14.56x	3.77x		18.4	88	2025-12-31
Current ratio	0.49x	2.01x		93.8	661	2025-12-31
Growth and financing, sleeve percentile 52.4						
Revenue growth, three-year compound	5.2%	6.4%		53.5	534	2025-12-31
Free cash flow growth, three-year compound	10.0%	18.1%		59.3	264	2025-12-31
Reinvestment rate	not computable	13.5%				
latest aligned inputs end 2011-12-31; latest annual assets end 2025-12-31						
Asset growth, three years	(8.5%)	5.1%		81.5	559	2025-12-31
Net share issuance, one year	(3.1%)	0.5%		15.2	408	2026-01-30

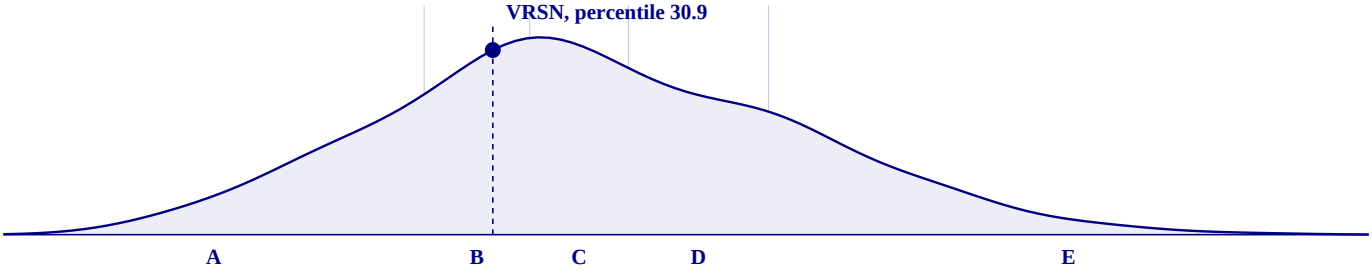
Warnings

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

Check	Measured
Fortress balance sheet	cash minus debt is 339,223,000 USD; Altman Z is not used

Among 496 peers

business equipment; 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
149	EnerSys (ENS)	29.9	B	
150	Data Storage Corp. (DTST)	30.1	B	short runway, late filer, fortress balance sheet
151	Formfactor Inc. (FORM)	30.3	B	fortress balance sheet
152	Block, Inc. (XYZ)	30.5	B	
153	Leonardo DRS, Inc. (DRS)	30.7	B	fortress balance sheet
154	Verisign Inc/Ca (VRSN)	30.9	B	fortress balance sheet
155	CTS Corp. (CTS)	31.1	B	fortress balance sheet
156	Where Food Comes From, Inc. (WFCF)	31.3	B	fortress balance sheet
157	Waters Corp. (WAT)	31.5	B	dilution
158	CarGurus, Inc. (CARG)	31.7	B	fortress balance sheet
159	TaskUs, Inc. (TASK)	31.9	B	

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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	19.1%	(2.0%)	66
Distance from 52-week high	(0.9%)	(32.4%)	96
EBIT to enterprise value	4.1%	1.6%	73
Free cash flow yield	3.9%	2.8%	60
Book value to price	(0.08)	0.27	4
Sales to price	0.06	0.31	9
Composite equity issuance, five years	(25.0%)	4.3%	7
Relative strength against the sector, log excess return	(0.09)	(0.29)	66

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	fail
Current ratio improved	pass
No new shares issued	pass
Gross margin improved	pass
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$206.8M
Operating cash flow, four quarters	$1.1B
Months of runway	not finite
Days since last periodic filing	10 (10-Q received Oct 22, 2026)
Median daily dollar volume, 63 sessions	$212.5M

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	$1.7B	2025-12-31	2026-02-05	10-K	26-000006
2	cost of revenue	us-gaap:CostOfRevenue	$196.3M	2025-12-31	2026-02-05	10-K	26-000006
3	assets	us-gaap:Assets	$1.3B	2025-12-31	2026-02-05	10-K	26-000006
4	operating income	us-gaap:OperatingIncomeLoss	$528.2M	2013-12-31	2016-02-19	10-K	16-000086
5	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$456.8M	2013-12-31	2016-02-19	10-K	16-000086
6	income tax	us-gaap:IncomeTaxExpenseBenefit	-$87.7M	2013-12-31	2016-02-19	10-K	16-000086
7	total debt	us-gaap:LongTermDebt	$0	2013-12-31	2014-02-21	10-K	14-000006
8	book equity	us-gaap:StockholdersEquity	-$423.6M	2013-12-31	2015-02-13	10-K	15-000011
9	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$339.2M	2013-12-31	2017-02-17	10-K	17-000004
10	total debt	us-gaap:LongTermDebt	$100.0M	2012-12-31	2014-02-21	10-K	14-000006
11	book equity	us-gaap:StockholdersEquity	-$9.3M	2012-12-31	2014-02-21	10-K	14-000006
12	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$130.7M	2012-12-31	2016-02-19	10-K	16-000086
13	net income	us-gaap:ProfitLoss	$825.7M	2025-12-31	2026-02-05	10-K	26-000006
14	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$1.1B	2025-12-31	2026-02-05	10-K	26-000006
15	assets	us-gaap:Assets	$1.4B	2024-12-31	2026-02-05	10-K	26-000006
16	revenue	us-gaap:Revenues	$1.6B	2024-12-31	2026-02-05	10-K	26-000006
17	cost of revenue	us-gaap:CostOfRevenue	$191.4M	2024-12-31	2026-02-05	10-K	26-000006
18	revenue	us-gaap:Revenues	$1.5B	2023-12-31	2026-02-05	10-K	26-000006

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19	cost of revenue	us-gaap:CostOfRevenue	$197.3M	2023-12-31	2026-02-05	10-K	26-000006
20	revenue	us-gaap:Revenues	$1.4B	2022-12-31	2025-02-13	10-K	25-000006
21	cost of revenue	us-gaap:CostOfRevenue	$200.7M	2022-12-31	2025-02-13	10-K	25-000006
22	revenue	us-gaap:Revenues	$1.3B	2021-12-31	2024-02-15	10-K	24-000006
23	cost of revenue	us-gaap:CostOfRevenue	$191.9M	2021-12-31	2024-02-15	10-K	24-000006
24	current assets	us-gaap:AssetsCurrent	$652.5M	2025-12-31	2026-02-05	10-K	26-000006
25	current liabilities	us-gaap:LiabilitiesCurrent	$1.3B	2025-12-31	2026-02-05	10-K	26-000006
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$11.8B	2025-12-31	2026-02-05	10-K	26-000006
27	operating income	us-gaap:OperatingIncomeLoss	$1.1B	2025-12-31	2026-02-05	10-K	26-000006
28	book equity	us-gaap:StockholdersEquity	-$2.2B	2025-12-31	2026-02-05	10-K	26-000006
29	liabilities	us-gaap:Liabilities	$3.5B	2025-12-31	2026-02-05	10-K	26-000006
30	total debt	us-gaap:LongTermDebt	$100.0M	2011-12-31	2013-02-28	10-K	13-000006
31	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$1.3B	2011-12-31	2015-02-13	10-K	15-000011
32	operating income	us-gaap:OperatingIncomeLoss	$329.4M	2011-12-31	2014-02-21	10-K	14-000006
33	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$55.7M	2011-12-31	2012-02-24	10-K	12-077600
34	interest expense	us-gaap:InterestExpense	$77.0M	2025-12-31	2026-02-05	10-K	26-000006
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$22.8M	2025-12-31	2026-02-05	10-K	26-000006
36	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$902.6M	2024-12-31	2026-02-05	10-K	26-000006
37	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$28.1M	2024-12-31	2026-02-05	10-K	26-000006
38	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$853.8M	2023-12-31	2026-02-05	10-K	26-000006
39	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$45.8M	2023-12-31	2026-02-05	10-K	26-000006
40	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$831.1M	2022-12-31	2025-02-13	10-K	25-000006
41	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$27.4M	2022-12-31	2025-02-13	10-K	25-000006
42	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$192.7M	2011-12-31	2014-02-21	10-K	14-000006
43	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$193.6M	2011-12-31	2014-02-21	10-K	14-000006
44	income tax	us-gaap:IncomeTaxExpenseBenefit	$55.0M	2011-12-31	2014-02-21	10-K	14-000006
45	current assets	us-gaap:AssetsCurrent	$1.4B	2011-12-31	2013-02-28	10-K	13-000006
46	current liabilities	us-gaap:LiabilitiesCurrent	$658.9M	2011-12-31	2013-02-28	10-K	13-000006
47	current assets	us-gaap:AssetsCurrent	$2.2B	2010-12-31	2012-02-24	10-K	12-077600
48	current liabilities	us-gaap:LiabilitiesCurrent	$652.7M	2010-12-31	2012-02-24	10-K	12-077600
49	assets	us-gaap:Assets	$1.7B	2023-12-31	2025-02-13	10-K	25-000006
50	assets	us-gaap:Assets	$1.7B	2022-12-31	2024-02-15	10-K	24-000006
51	shares outstanding	dei:EntityCommonStockSharesOutstanding	91,700,000	2026-01-30	2026-02-05	10-K	26-000006
52	shares outstanding	dei:EntityCommonStockSharesOutstanding	94,600,000	2025-02-07	2025-02-13	10-K	25-000006

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