Allient Inc.

ALNT

Nasdaq; business equipment; SIC 3825, Instruments For Meas & Testing of Electricity & Elec Signals; CIK 0000046129

B

second fifth of 496 graded peers in business equipment

rank 118 of 496; percentile 23.6; sampling error 2.2 points; lower is stronger

A B C D E

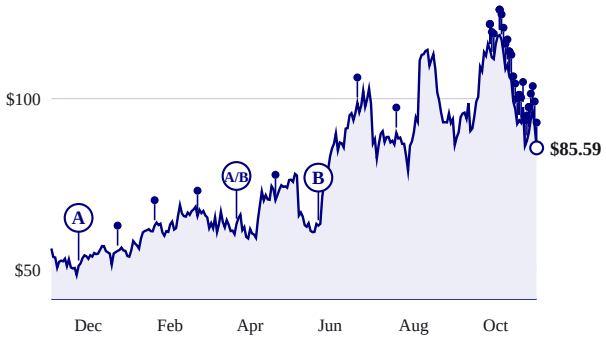
B, the elk



Scoreboard

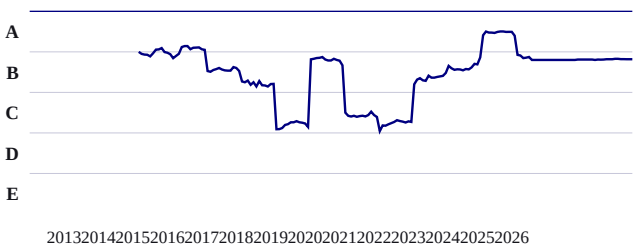
Profitability	B/C percentile 38.0
Solvency	B percentile 24.8
Growth and financing	C/D percentile 59.1
Reliability	0.87 AUC filers with $120M to $591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025
Peer failure rate	1.03% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$120M to $591M assets total assets $577.6M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress
Inputs computable	9 of 14
Graded from	filings received through Mar 5, 2026 242 days before the rescan; latest periodic filing 10-Q received Aug 5, 2026
Last close	$85.45 2026-10-30; market equity $1.5B; 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 Mar 5, 2026

We are a global company that designs, manufactures and sells precision and specialty controlled motion components and systems used in a broad range of industries. Our target markets include Industrial, Vehicle, Medical, and Aerospace & Defense (A&D). We are headquartered in Amherst, NY, and have global production operations and sell to markets across the United States, Canada, South America, Europe and Asia-Pacific. We are known worldwide for our expertise in electro-magnetic, mechanical and electronic motion technology.

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 38.0						
Gross profitability	31.5%	28.7%		41.2	554	2025-12-31
Return on invested capital	not computable	11.4%				

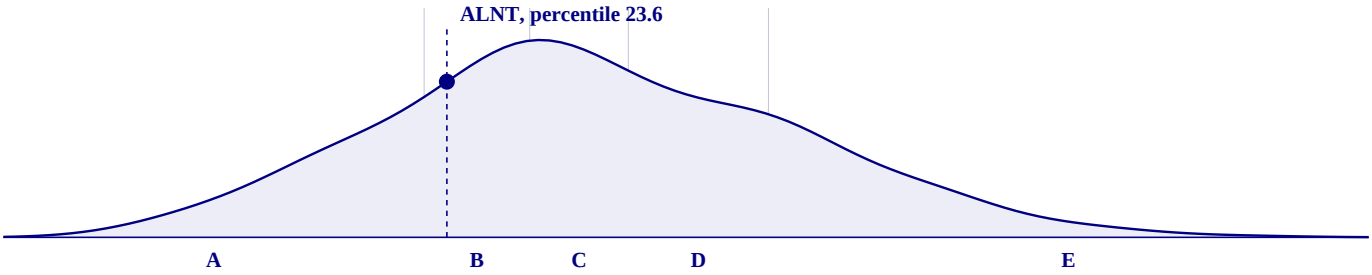
latest aligned inputs end 2015-12-31; latest annual assets end 2025-12-31

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Accruals ratio	(6.0%)	(7.3%)	59.9	617	2025-12-31
Gross margin stability, five years	0.9 pts	2.3 pts	12.7	425	2025-12-31
Solvency, sleeve percentile 24.8					
Twelve-month failure probability	not computable	0.05%			
latest liabilities, cash plus short-term investments, book equity, and shares are required					
Altman Z double-prime	4.86	2.15	23.6	564	2025-12-31
Net debt to EBITDA	not computable	1.09x			
latest aligned inputs end 2015-12-31; latest annual assets end 2025-12-31					
Interest coverage	not computable	3.77x			
latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31					
Current ratio	3.66x	2.01x	26.1	661	2025-12-31
Growth and financing, sleeve percentile 59.1					
Revenue growth, three-year compound	3.3%	6.4%	58.7	534	2025-12-31
Free cash flow growth, three-year compound	not computable	18.1%			
current FCF must be positive and base FCF must exceed $100,000					
Reinvestment rate	(43.0%)	13.5%	65.8	223	2025-12-31
Asset growth, three years	(0.6%)	5.1%	63.6	559	2025-12-31
Net share issuance, one year	0.6%	0.5%	48.2	408	2026-03-05

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
113	ServiceNow, Inc. (NOW)	22.6	B	
114	Cognex Corp. (CGNX)	22.8	B	
115	Eos Energy Enterprises, Inc. (EOSE)	23.1	B	
116	Eos Energy Enterprises, Inc. (EOSEW)	23.1	B	
117	Transcat Inc. (TRNS)	23.4	B	
118	Allient Inc. (ALNT)	23.6	B	
119	Yext, Inc. (YEXT)	23.8	B	fortress balance sheet
120	PagerDuty, Inc. (PD)	24.0	B	
121	Ambarella Inc. (AMBA)	24.2	B	
122	Innovative Solutions & Support Inc. (IA)	24.4	B	
123	Elastic N.V. (ESTC)	24.6	B	fortress balance sheet

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	104.5%	(2.0%)	91
Distance from 52-week high	(27.9%)	(32.4%)	57
EBIT to enterprise value	3.0%	1.6%	62
Free cash flow yield	3.4%	2.8%	56
Book value to price	0.21	0.27	44

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Sales to price	0.38	0.31	56
Composite equity issuance, five years	12.9%	4.3%	60
Relative strength against the sector, log excess return	0.45	(0.29)	91

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 7 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	pass
Cash, filings, liquidity	
Cash and equivalents	$42.1M
Operating cash flow, four quarters	$38.4M
Months of runway	not finite
Days since last periodic filing	89 (10-Q received Aug 5, 2026)
Median daily dollar volume, 63 sessions	$20.3M

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	$181.7M	2025-12-31	2026-03-05	10-K	26-024123
2	assets	us-gaap:Assets	$577.6M	2025-12-31	2026-03-05	10-K	26-024123
3	operating income	us-gaap:OperatingIncomeLoss	$20.9M	2015-12-31	2018-03-14	10-K	18-017478
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$15.4M	2015-12-31	2018-03-14	10-K	18-017478
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$4.3M	2015-12-31	2018-03-14	10-K	18-017478
6	total debt	us-gaap:LongTermDebt	$68.8M	2015-12-31	2016-03-09	10-K	16-103933
7	book equity	us-gaap:StockholdersEquity	$64.6M	2015-12-31	2019-03-13	10-K	19-014558
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$21.3M	2015-12-31	2019-03-13	10-K	19-014558
9	total debt	us-gaap:LongTermDebt	$74.8M	2014-12-31	2015-03-12	10-K	15-002052
10	book equity	us-gaap:StockholdersEquity	$56.0M	2014-12-31	2018-03-14	10-K	18-017478
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$13.1M	2014-12-31	2018-03-14	10-K	18-017478
12	net income	us-gaap:ProfitLoss	$22.0M	2025-12-31	2026-03-05	10-K	26-024123
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$56.7M	2025-12-31	2026-03-05	10-K	26-024123
14	assets	us-gaap:Assets	$575.8M	2024-12-31	2026-03-05	10-K	26-024123
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$554.5M	2025-12-31	2026-03-05	10-K	26-024123
16	gross profit	us-gaap:GrossProfit	$165.7M	2024-12-31	2026-03-05	10-K	26-024123
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$530.0M	2024-12-31	2026-03-05	10-K	26-024123
18	gross profit	us-gaap:GrossProfit	$183.7M	2023-12-31	2026-03-05	10-K	26-024123
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$578.6M	2023-12-31	2026-03-05	10-K	26-024123
20	gross profit	us-gaap:GrossProfit	$157.3M	2022-12-31	2025-03-05	10-K	25-002265
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$503.0M	2022-12-31	2025-03-05	10-K	25-002265
22	gross profit	us-gaap:GrossProfit	$121.1M	2021-12-31	2024-03-05	10-K	24-002487
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$403.5M	2021-12-31	2024-03-05	10-K	24-002487
24	current assets	us-gaap:AssetsCurrent	$253.4M	2025-12-31	2026-03-05	10-K	26-024123
25	current liabilities	us-gaap:LiabilitiesCurrent	$69.3M	2025-12-31	2026-03-05	10-K	26-024123
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$197.0M	2025-12-31	2026-03-05	10-K	26-024123
27	operating income	us-gaap:OperatingIncomeLoss	$44.0M	2025-12-31	2026-03-05	10-K	26-024123

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28	book equity	us-gaap:StockholdersEquity	$301.5M	2025-12-31	2026-03-05	10-K	26-024123
29	liabilities	us-gaap:Liabilities	$276.1M	2025-12-31	2026-03-05	10-K	26-024123
30	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$7.5M	2015-12-31	2018-03-14	10-K	18-017478
31	operating income	us-gaap:OperatingIncomeLoss	$42.3M	2023-12-31	2026-03-05	10-K	26-024123
32	interest expense	us-gaap:InterestExpense	$12.4M	2023-12-31	2024-03-05	10-K	24-002487
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$7.0M	2025-12-31	2026-03-05	10-K	26-024123
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$41.9M	2024-12-31	2026-03-05	10-K	26-024123
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$9.7M	2024-12-31	2026-03-05	10-K	26-024123
36	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$45.0M	2023-12-31	2026-03-05	10-K	26-024123
37	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$11.6M	2023-12-31	2026-03-05	10-K	26-024123
38	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$5.6M	2022-12-31	2025-03-05	10-K	25-002265
39	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$15.9M	2022-12-31	2025-03-05	10-K	25-002265
40	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$25.4M	2025-12-31	2026-03-05	10-K	26-024123
41	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$28.7M	2025-12-31	2026-03-05	10-K	26-024123
42	income tax	us-gaap:IncomeTaxExpenseBenefit	$6.7M	2025-12-31	2026-03-05	10-K	26-024123
43	current assets	us-gaap:AssetsCurrent	$237.6M	2024-12-31	2026-03-05	10-K	26-024123
44	current liabilities	us-gaap:LiabilitiesCurrent	$57.4M	2024-12-31	2026-03-05	10-K	26-024123
45	assets	us-gaap:Assets	$597.5M	2023-12-31	2025-03-05	10-K	25-002265
46	assets	us-gaap:Assets	$588.3M	2022-12-31	2024-03-05	10-K	24-002487
47	shares outstanding	dei:EntityCommonStockSharesOutstanding	16,940,049	2026-03-05	2026-03-05	10-K	26-024123
48	shares outstanding	dei:EntityCommonStockSharesOutstanding	16,844,836	2025-03-05	2025-03-05	10-K	25-002265

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