Richardson Electronics, Ltd. RELL

Nasdaq; shops; SIC 5065, Wholesale-Electronic Parts & Equipment, NEC; CIK 0000355948

A

strongest fifth of 254 graded peers in shops

rank 33 of 254; percentile 12.6; sampling error 3.0 points; lower is stronger

A B C D E

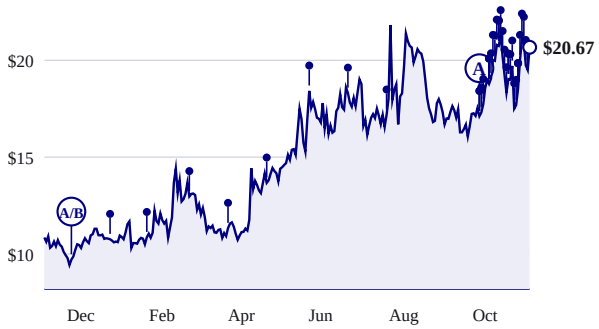
A, the bull



Scoreboard

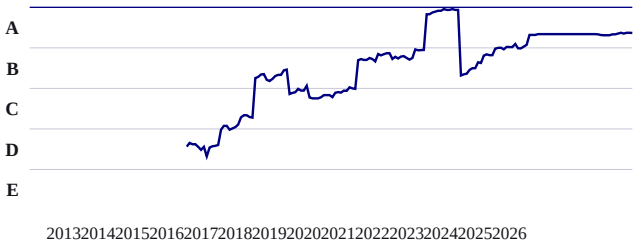
Profitability	C percentile 55.7
Solvency	A percentile 3.5
Growth and financing	C percentile 46.5
Reliability	0.87 AUC filers with $120M to $591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025
Peer failure rate	1.03% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$120M to $591M assets total assets $202.0M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: dilution, distress, fortress balance sheet
Inputs computable	8 of 14
Graded from	filings received through Aug 3, 2026 93 days before the rescan; latest periodic filing 10-Q received Oct 8, 2026
Last close	$20.71 2026-11-03; market equity $0; 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 Aug 3, 2026

Richardson Electronics, Ltd. (the "Company," "we," "our") is a global manufacturer of engineered solutions, green energy products, power grid and microwave tubes, and related consumables; power conversion and RF and microwave components including green energy solutions; tubes for diagnostic imaging equipment; and customized display solutions. We have manufacturing at our facilities located in LaFox, Illinois, Marlborough, Massachusetts, and Donaueschingen, Germany. We serve customers in alternative energy, healthcare, aviation, broadcast, communications, industrial, marine, medical, military, scientific, and semiconductor markets.

The fourteen inputs

lower percentile is stronger; sleeves and inputs within a sleeve carry equal weight

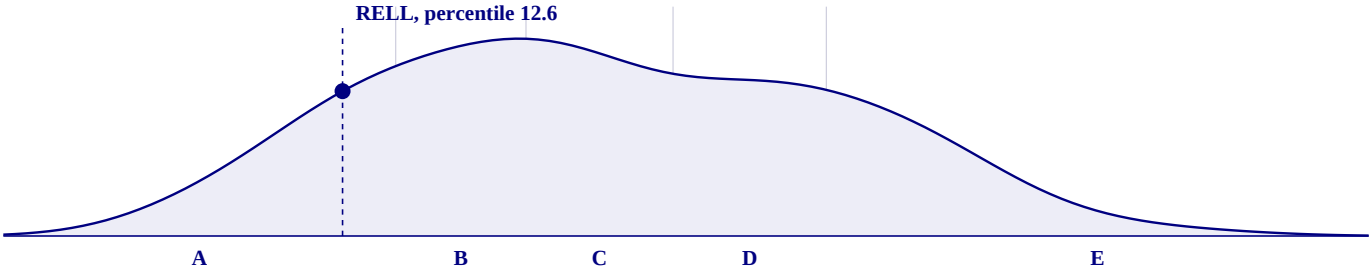
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 55.7						
Gross profitability	35.3%	42.6%		58.2	238	2026-05-30
Return on invested capital	not computable	10.9%				
one or more required annual facts are missing						

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Accruals ratio	2.8%	(4.8%)		93.6	283	2026-05-30
Gross margin stability, five years	0.5 pts	1.2 pts		15.3	216	2026-05-30
Solvency, sleeve percentile 3.5						
Twelve-month failure probability	not computable	0.03%				
liabilities and a nearby cover-page share count are required at 2026-08-29						
Altman Z double-prime	10.46	1.93		2.5	204	2026-05-30
Net debt to EBITDA	not computable	1.88x				
one or more required annual facts are missing						
Interest coverage	not computable	2.49x				
interest expense must exceed $100,000						
Current ratio	4.75x	1.37x		4.5	291	2026-05-30
Growth and financing, sleeve percentile 46.5						
Revenue growth, three-year compound	(4.5%)	1.6%		73.9	265	2026-05-30
Free cash flow growth, three-year compound	not computable	4.8%				
current FCF must be positive and base FCF must exceed $100,000						
Reinvestment rate	142.4%	8.4%		7.3	152	2026-05-30
Asset growth, three years	0.7%	3.4%		58.3	267	2026-05-30
Net share issuance, one year	not computable	(0.6%)				
two annual share counts are required; found 1						

Among 254 peers

shops; 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
28	Eplus Inc. (PLUS)	10.7	A	fortress balance sheet
29	Rave Restaurant Group, Inc. (RAVE)	11.1	A	
30	Lovesac Co. (LOVE)	11.5	A	fortress balance sheet
31	Ollie's Bargain Outlet Holdings, Inc. (OLLI)	11.9	A	fortress balance sheet
32	Village Super Market Inc. (VLGEA)	12.3	A	fortress balance sheet
33	Richardson Electronics, Ltd. (RELL)	12.6	A	
34	Amcon Distributing Co. (DIT)	13.0	A	
35	Core & Main, Inc. (CNM)	13.4	A	
36	Signet Jewelers Ltd. (SIG)	13.8	A	
37	Sally Beauty Holdings, Inc. (SBH)	14.2	A	
38	Unifirst Corp. (UNF)	14.6	A	fortress balance sheet

What the price implies

at the 2026-11-03 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	67.6%	(0.7%)	93
Distance from 52-week high	(5.3%)	(18.8%)	86
EBIT to enterprise value	not computable	5.2%	
Free cash flow yield	not computable	3.9%	

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Book value to price	not computable	0.35	
Sales to price	not computable	1.56	
Composite equity issuance, five years	not computable	(16.6%)	
Relative strength against the sector, log excess return	0.61	0.08	93

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score None of 9, period end 2026-05-30	
Return on assets above zero	pass
Operating cash flow above zero	pass
Return on assets improved	pass
Operating cash flow exceeds net income	fail
Long-term leverage fell	fail
Current ratio improved	pass
No new shares issued	fail
Gross margin improved	pass
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$36.9M
Operating cash flow, four quarters	$5.3M
Months of runway	not finite
Days since last periodic filing	27 (10-Q received Oct 8, 2026)
Median daily dollar volume, 63 sessions	$3.2M

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	$71.3M	2026-05-30	2026-08-03	10-K	26-000002
2	assets	us-gaap:Assets	$202.0M	2026-05-30	2026-08-03	10-K	26-000002
3	net income	us-gaap:NetIncomeLoss	$6.4M	2026-05-30	2026-08-03	10-K	26-000002
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$762,000	2026-05-30	2026-08-03	10-K	26-000002
5	assets	us-gaap:Assets	$195.8M	2025-05-31	2026-08-03	10-K	26-000002
6	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$228.6M	2026-05-30	2026-08-03	10-K	26-000002
7	gross profit	us-gaap:GrossProfit	$64.8M	2025-05-31	2026-08-03	10-K	26-000002
8	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$208.9M	2025-05-31	2026-08-03	10-K	26-000002
9	gross profit	us-gaap:GrossProfit	$60.0M	2024-06-01	2026-08-03	10-K	26-000002
10	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$196.5M	2024-06-01	2026-08-03	10-K	26-000002
11	gross profit	us-gaap:GrossProfit	$83.7M	2023-05-27	2025-08-04	10-K	25-101785
12	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$262.7M	2023-05-27	2025-08-04	10-K	25-101785
13	gross profit	us-gaap:GrossProfit	$71.7M	2022-05-28	2024-08-05	10-K	24-090651
14	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$224.6M	2022-05-28	2024-08-05	10-K	24-090651
15	current assets	us-gaap:AssetsCurrent	$172.7M	2026-05-30	2026-08-03	10-K	26-000002
16	current liabilities	us-gaap:LiabilitiesCurrent	$36.4M	2026-05-30	2026-08-03	10-K	26-000002
17	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$82.3M	2026-05-30	2026-08-03	10-K	26-000002
18	operating income	us-gaap:OperatingIncomeLoss	$6.5M	2026-05-30	2026-08-03	10-K	26-000002
19	book equity	us-gaap:StockholdersEquity	$163.7M	2026-05-30	2026-08-03	10-K	26-000002
20	liabilities	us-gaap:Liabilities	$38.3M	2026-05-30	2026-08-03	10-K	26-000002
21	operating income	us-gaap:OperatingIncomeLoss	$6.3M	2012-06-02	2014-07-25	10-K	14-000015
22	interest expense	us-gaap:InterestExpense	$1,000	2012-06-02	2012-07-27	10-K	12-319450
23	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$4.4M	2026-05-30	2026-08-03	10-K	26-000002
24	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$10.6M	2025-05-31	2026-08-03	10-K	26-000002
25	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$2.8M	2025-05-31	2026-08-03	10-K	26-000002
26	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$6.5M	2024-06-01	2026-08-03	10-K	26-000002

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27	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$4.0M	2024-06-01	2026-08-03	10-K	26-000002
28	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$8.2M	2023-05-27	2025-08-04	10-K	25-101785
29	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$7.4M	2023-05-27	2025-08-04	10-K	25-101785
30	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$3.8M	2026-05-30	2026-08-03	10-K	26-000002
31	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$7.5M	2026-05-30	2026-08-03	10-K	26-000002
32	income tax	us-gaap:IncomeTaxExpenseBenefit	$1.1M	2026-05-30	2026-08-03	10-K	26-000002
33	current assets	us-gaap:AssetsCurrent	$165.9M	2025-05-31	2026-08-03	10-K	26-000002
34	current liabilities	us-gaap:LiabilitiesCurrent	$36.8M	2025-05-31	2026-08-03	10-K	26-000002
35	assets	us-gaap:Assets	$192.4M	2024-06-01	2025-08-04	10-K	25-101785
36	assets	us-gaap:Assets	$198.0M	2023-05-27	2024-08-05	10-K	24-090651
37	shares outstanding	dei:EntityCommonStockSharesOutstanding	10,712,044	2017-07-24	2017-07-31	10-K	17-003807

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