# Allient Inc.

**ALNT**

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

**B**

**second fifth of 498 graded peers in business equipment**

rank 121 of 498; percentile 24.1; sampling error 2.2 points; lower is stronger

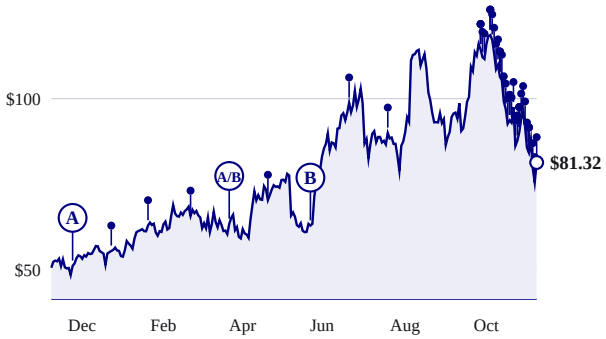
A B C D E

**B, the elk**



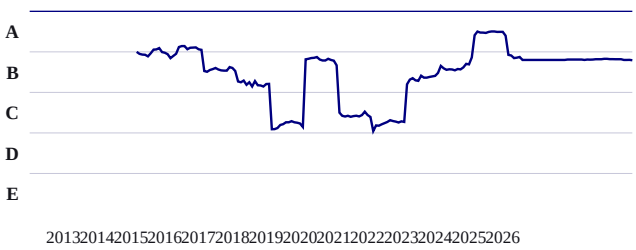
| Scoreboard | |
|---|---|
| **Profitability** | B/C<br>percentile 37.9 |
| **Solvency** | B<br>percentile 24.9 |
| **Growth and financing** | C/D<br>percentile 59.2 |
| **Reliability** | 0.87 AUC<br>filers with $120M to $591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025 |
| **Peer failure rate** | 1.03% a year<br>Item 1.03 bankruptcies, same asset band, 2012 to 2025 |
| **Size band** | $120M to $591M assets<br>total assets $577.6M |
| **Standard universe** | inside<br>revenue above $1M and assets above $10M |
| **Warnings** | none triggered<br>not computable: distress |
| **Inputs computable** | 9 of 14 |
| **Graded from** | filings received through Mar 5, 2026<br>247 days before the rescan; latest periodic filing 10-Q received Nov 4, 2026 |
| **Last close** | $81.57<br>2026-11-06; market equity $1.4B; 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 37.9** | | | | | | |
| Gross profitability | 31.5% | 28.7% | | 41.3 | 555 | 2025-12-31 |
| Return on invested capital | not computable | 11.4% | | | | |

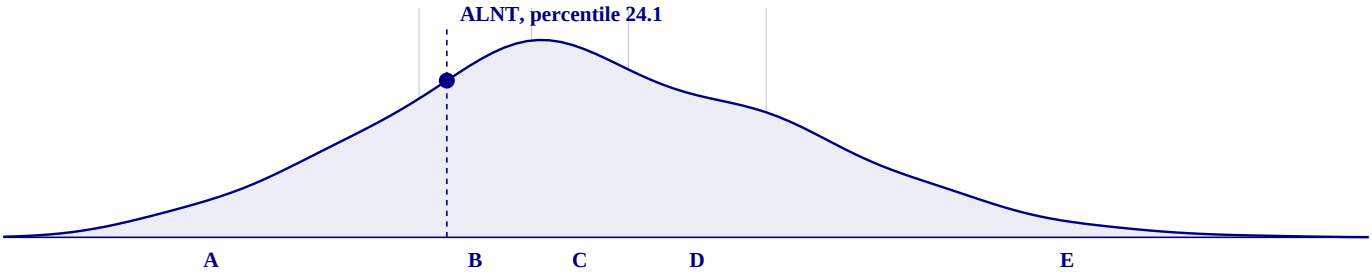
*latest aligned inputs end 2015-12-31; latest annual assets end 2025-12-31*

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| | | | | | |
|---|---|---|---|---|---|
| Accruals ratio | (6.0%) | (7.3%) | 59.6 | 618 | 2025-12-31 |
| Gross margin stability, five years | 0.9 pts | 2.3 pts | 12.7 | 426 | 2025-12-31 |
| **Solvency, sleeve percentile 24.9** | | | | | |
| Twelve-month failure probability | not computable | 0.06% | | | |
| *latest liabilities, cash plus short-term investments, book equity, and shares are required* | | | | | |
| Altman Z double-prime | 4.86 | 2.18 | 23.6 | 565 | 2025-12-31 |
| Net debt to EBITDA | not computable | 1.08x | | | |
| *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 | 663 | 2025-12-31 |
| **Growth and financing, sleeve percentile 59.2** | | | | | |
| Revenue growth, three-year compound | 3.3% | 6.4% | 59.2 | 535 | 2025-12-31 |
| Free cash flow growth, three-year compound | not computable | 18.0% | | | |
| *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% | 63.7 | 560 | 2025-12-31 |
| Net share issuance, one year | 0.6% | 0.5% | 48.2 | 408 | 2026-03-05 |

## Among 498 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 |
|---|---|---|---|---|
| 116 | Eos Energy Enterprises, Inc. (EOSE) | 23.2 | B | |
| 117 | Eos Energy Enterprises, Inc. (EOSEW) | 23.2 | B | |
| 118 | Transcat Inc. (TRNS) | 23.5 | B | |
| 119 | Tenable Holdings, Inc. (TENB) | 23.7 | B | |
| 120 | PagerDuty, Inc. (PD) | 23.9 | B | |
| 121 | Allient Inc. (ALNT) | 24.1 | B | |
| 122 | Yext, Inc. (YEXT) | 24.3 | B | fortress balance sheet |
| 123 | Ambarella Inc. (AMBA) | 24.5 | B | |
| 124 | Innovative Solutions & Support Inc. (IA) | 24.7 | B | |
| 125 | Elastic N.V. (ESTC) | 24.9 | B | fortress balance sheet |
| 126 | Parsons Corp. (PSN) | 25.2 | B | |

## What the price implies

*at the 2026-11-06 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 | (31.5%) | (36.5%) | 57 |
| EBIT to enterprise value | 3.1% | 1.8% | 61 |
| Free cash flow yield | 3.6% | 2.9% | 55 |
| Book value to price | 0.24 | 0.28 | 44 |

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| | | | |
|---|---|---|---|
| Sales to price | 0.40 | 0.33 | 57 |
| Composite equity issuance, five years | 12.9% | 4.2% | 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 | $39.6M |
| Operating cash flow, four quarters | $35.6M |
| Months of runway | not finite |
| Days since last periodic filing | 3 (10-Q received Nov 4, 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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