# Core Molding Technologies Inc.

**CMT**

NYSE; manufacturing; SIC 3089, Plastics Products, NEC; CIK 0001026655

# B

**second fifth of 255 graded peers in manufacturing**

rank 76 of 255; percentile 29.5; sampling error 3.0 points; lower is stronger

A B C D E

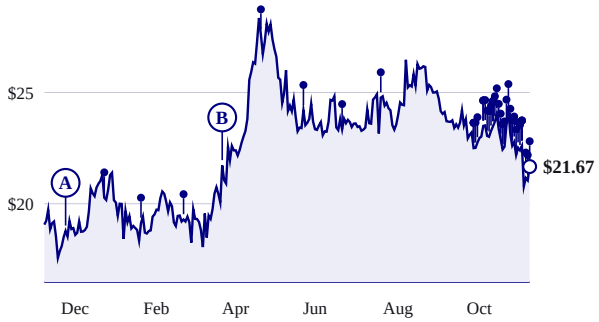
**B, the elk**



## Scoreboard

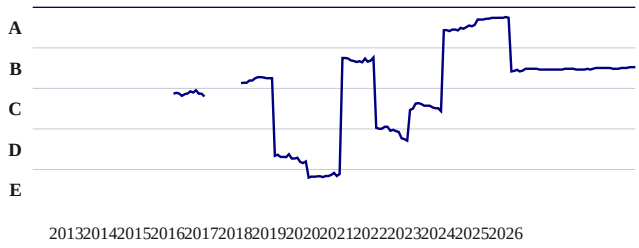
| | |
|---|---|
| **Profitability** | C<br>percentile 51.2 |
| **Solvency** | A/B<br>percentile 19.1 |
| **Growth and financing** | C<br>percentile 56.9 |
| **Reliability** | 0.87 AUC<br>filers with $120M to $591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025 |
| **Peer failure rate** | 1.03% a year<br>Item 1.03 bankruptcies, same asset band, 2012 to 2025 |
| **Size band** | $120M to $591M assets<br>total assets $228.1M |
| **Standard universe** | inside<br>revenue above $1M and assets above $10M |
| **Warnings** | none triggered; fortress balance sheet<br>not computable: distress |
| **Inputs computable** | 12 of 14 |
| **Graded from** | filings received through Mar 10, 2026<br>242 days before the rescan; latest periodic filing 10-Q received Nov 4, 2026 |
| **Last close** | $21.51<br>2026-11-06; market equity $190.2M; 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 10, 2026*

Core Molding Technologies, Inc. (the "Company") and its subsidiaries operate in the engineered materials market as one operating segment as a molder of thermoplastic and thermoset structural products. The Company produces and sells molded products for varied markets, including medium and heavy-duty trucks, power sports, building products and other industrial markets. Core Molding Technologies has its headquarters in Columbus, Ohio, and operates six production facilities in the United States, Canada and Mexico.

## 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 51.2** | | | | | | |
| Gross profitability | 20.9% | 21.9% | | 51.8 | 275 | 2025-12-31 |
| Return on invested capital | 8.2% | 9.7% | | 58.0 | 101 | 2025-12-31 |
| Accruals ratio | (3.7%) | (3.6%) | | 50.2 | 306 | 2025-12-31 |
| Gross margin stability, five years | 2.0 pts | 2.1 pts | | 44.7 | 229 | 2025-12-31 |

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| | | | | | | |
|---|---|---|---|---|---|---|
| **Solvency, sleeve percentile 19.1** | | | | | | |
| Twelve-month failure probability | not computable | 0.04% | | | | |
| *latest liabilities, cash plus short-term investments, book equity, and shares are required* | | | | | | |
| Altman Z double-prime | 6.88 | 3.66 | 17.8 | 242 | 2025-12-31 | |
| Net debt to EBITDA | (0.77x) | 1.78x | 8.3 | 121 | 2025-12-31 | |
| Interest coverage | not computable | 5.09x | | | | |
| *interest expense must exceed $100,000* | | | | | | |
| Current ratio | 3.02x | 2.25x | 31.1 | 323 | 2025-12-31 | |
| **Growth and financing, sleeve percentile 56.9** | | | | | | |
| Revenue growth, three-year compound | (10.1%) | 2.2% | 92.5 | 269 | 2025-12-31 | |
| Free cash flow growth, three-year compound | (7.1%) | 13.5% | 82.1 | 141 | 2025-12-31 | |
| Reinvestment rate | 72.8% | 26.1% | 25.4 | 139 | 2025-12-31 | |
| Asset growth, three years | 4.7% | 4.3% | 47.1 | 277 | 2025-12-31 | |
| Net share issuance, one year | (0.7%) | 0.01% | 37.5 | 241 | 2026-03-09 | |

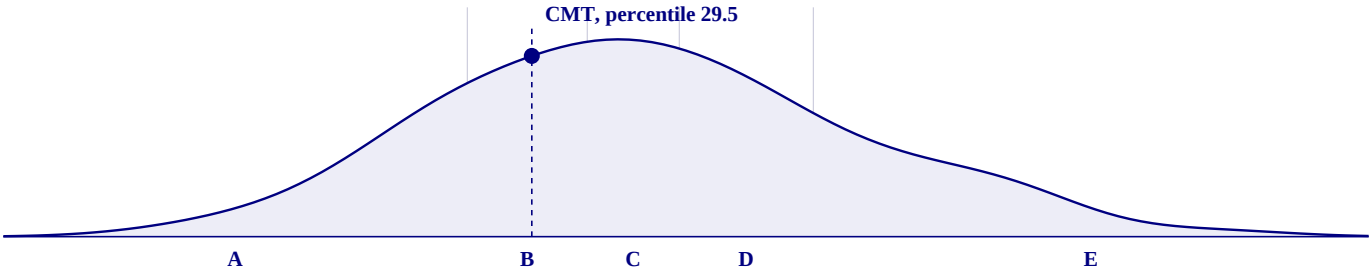
## Warnings

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

| Check | Measured |
|---|---|
| Fortress balance sheet | cash minus debt is 20,419,000 USD; Altman Z is not used |

## Among 255 peers

*manufacturing; 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 |
|---|---|---|---|---|
| 71 | CRH Public Ltd. Co. (CRH) | 27.6 | B | |
| 72 | Janus International Group, Inc. (JBI) | 28.0 | B | |
| 73 | Twin Disc Inc. (TWIN) | 28.3 | B | |
| 74 | Flowserve Corp. (FLS) | 28.7 | B | |
| 75 | Smith & Wesson Brands, Inc. (SWBI) | 29.1 | B | |
| 76 | Core Molding Technologies Inc. (CMT) | 29.5 | B | fortress balance sheet |
| 77 | Lindsay Corp. (LNN) | 29.9 | B | fortress balance sheet |
| 78 | Sturm Ruger & Co. Inc. (RGR) | 30.3 | B | |
| 79 | Snap-on Inc. (SNA) | 30.7 | B | fortress balance sheet |
| 80 | CPI Card Group Inc. (PMTS) | 31.1 | B | |
| 81 | Astec Industries Inc. (ASTE) | 31.5 | 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 | 27.0% | 9.8% | 66 |
| Distance from 52-week high | (23.6%) | (27.4%) | 59 |
| EBIT to enterprise value | 7.4% | 4.2% | 83 |
| Free cash flow yield | 1.0% | 3.5% | 26 |

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| | | | |
|---|---|---|---|
| Book value to price | 0.84 | 0.37 | 82 |
| Sales to price | 1.43 | 0.55 | 78 |
| Composite equity issuance, five years | not computable | (9.6%) | |
| Relative strength against the sector, log excess return | 0.16 | 0.01 | 66 |

## Diagnostics

*shown on every report; none enters the grade*

| Measure | Value |
|---|---|
| **Piotroski F-score 6 of 9, period end 2025-12-31** | |
| Return on assets above zero | pass |
| Operating cash flow above zero | pass |
| Return on assets improved | fail |
| Operating cash flow exceeds net income | pass |
| Long-term leverage fell | pass |
| Current ratio improved | pass |
| No new shares issued | pass |
| Gross margin improved | fail |
| Asset turnover improved | fail |
| **Cash, filings, liquidity** | |
| Cash and equivalents | $5.4M |
| Operating cash flow, four quarters | $8.4M |
| Months of runway | not finite |
| Days since last periodic filing | 3 (10-Q received Nov 4, 2026) |
| Median daily dollar volume, 63 sessions | $755,008 |

## 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 | $47.6M | 2025-12-31 | 2026-03-10 | 10-K | 26-000009 |
| 2 | assets | us-gaap:Assets | $228.1M | 2025-12-31 | 2026-03-10 | 10-K | 26-000009 |
| 3 | operating income | us-gaap:OperatingIncomeLoss | $14.2M | 2025-12-31 | 2026-03-10 | 10-K | 26-000009 |
| 4 | pretax income | us-gaap:IncomeLossFromContinuingOperationsBeforeInc... | $14.7M | 2025-12-31 | 2026-03-10 | 10-K | 26-000009 |
| 5 | income tax | us-gaap:IncomeTaxExpenseBenefit | $3.5M | 2025-12-31 | 2026-03-10 | 10-K | 26-000009 |
| 6 | total debt | us-gaap:LongTermDebt | $17.6M | 2025-12-31 | 2026-03-10 | 10-K | 26-000009 |
| 7 | book equity | us-gaap:StockholdersEquity | $158.2M | 2025-12-31 | 2026-03-10 | 10-K | 26-000009 |
| 8 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $38.1M | 2025-12-31 | 2026-03-10 | 10-K | 26-000009 |
| 9 | total debt | us-gaap:LongTermDebt | $19.7M | 2024-12-31 | 2026-03-10 | 10-K | 26-000009 |
| 10 | book equity | us-gaap:StockholdersEquity | $147.4M | 2024-12-31 | 2026-03-10 | 10-K | 26-000009 |
| 11 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $41.8M | 2024-12-31 | 2026-03-10 | 10-K | 26-000009 |
| 12 | net income | us-gaap:NetIncomeLoss | $11.2M | 2025-12-31 | 2026-03-10 | 10-K | 26-000009 |
| 13 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $19.2M | 2025-12-31 | 2026-03-10 | 10-K | 26-000009 |
| 14 | assets | us-gaap:Assets | $209.6M | 2024-12-31 | 2026-03-10 | 10-K | 26-000009 |
| 15 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $273.8M | 2025-12-31 | 2026-03-10 | 10-K | 26-000009 |
| 16 | gross profit | us-gaap:GrossProfit | $53.3M | 2024-12-31 | 2026-03-10 | 10-K | 26-000009 |
| 17 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $302.4M | 2024-12-31 | 2026-03-10 | 10-K | 26-000009 |
| 18 | gross profit | us-gaap:GrossProfit | $64.5M | 2023-12-31 | 2026-03-10 | 10-K | 26-000009 |
| 19 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $357.7M | 2023-12-31 | 2026-03-10 | 10-K | 26-000009 |
| 20 | gross profit | us-gaap:GrossProfit | $52.4M | 2022-12-31 | 2025-03-11 | 10-K | 25-000005 |
| 21 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $377.4M | 2022-12-31 | 2025-03-11 | 10-K | 25-000005 |
| 22 | gross profit | us-gaap:GrossProfit | $41.3M | 2021-12-31 | 2024-03-12 | 10-K | 24-000030 |
| 23 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $307.5M | 2021-12-31 | 2024-03-12 | 10-K | 24-000030 |
| 24 | current assets | us-gaap:AssetsCurrent | $103.3M | 2025-12-31 | 2026-03-10 | 10-K | 26-000009 |
| 25 | current liabilities | us-gaap:LiabilitiesCurrent | $34.2M | 2025-12-31 | 2026-03-10 | 10-K | 26-000009 |
| 26 | retained earnings | us-gaap:RetainedEarningsAccumulatedDeficit | $146.6M | 2025-12-31 | 2026-03-10 | 10-K | 26-000009 |

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| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| 27 | liabilities | us-gaap:Liabilities | $70.0M | 2025-12-31 | 2026-03-10 | 10-K | 26-000009 |
| 28 | depreciation amortization | us-gaap:DepreciationDepletionAndAmortization | $12.3M | 2025-12-31 | 2026-03-10 | 10-K | 26-000009 |
| 29 | interest expense | us-gaap:InterestExpense | $1,000 | 2025-12-31 | 2026-03-10 | 10-K | 26-000009 |
| 30 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $17.3M | 2025-12-31 | 2026-03-10 | 10-K | 26-000009 |
| 31 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $35.2M | 2024-12-31 | 2026-03-10 | 10-K | 26-000009 |
| 32 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $11.5M | 2024-12-31 | 2026-03-10 | 10-K | 26-000009 |
| 33 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $34.8M | 2023-12-31 | 2026-03-10 | 10-K | 26-000009 |
| 34 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $9.1M | 2023-12-31 | 2026-03-10 | 10-K | 26-000009 |
| 35 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $19.0M | 2022-12-31 | 2025-03-11 | 10-K | 25-000005 |
| 36 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $16.6M | 2022-12-31 | 2025-03-11 | 10-K | 25-000005 |
| 37 | current assets | us-gaap:AssetsCurrent | $102.9M | 2024-12-31 | 2026-03-10 | 10-K | 26-000009 |
| 38 | current liabilities | us-gaap:LiabilitiesCurrent | $36.7M | 2024-12-31 | 2026-03-10 | 10-K | 26-000009 |
| 39 | assets | us-gaap:Assets | $213.4M | 2023-12-31 | 2025-03-11 | 10-K | 25-000005 |
| 40 | assets | us-gaap:Assets | $198.6M | 2022-12-31 | 2024-03-12 | 10-K | 24-000030 |
| 41 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 8,833,231 | 2026-03-09 | 2026-03-10 | 10-K | 26-000009 |
| 42 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 8,895,735 | 2025-03-11 | 2025-03-11 | 10-K | 25-000005 |

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