McGraw Hill, Inc.

MH

NYSE; consumer nondurables; SIC 2741, Miscellaneous Publishing; CIK 0001951070

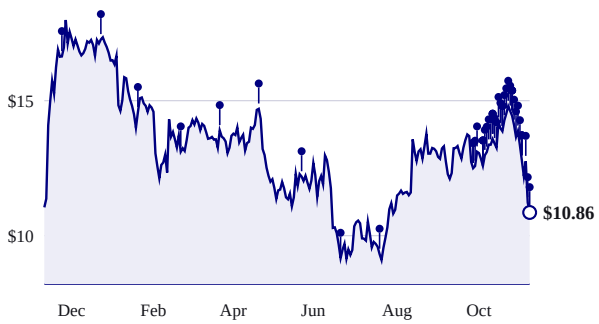
None

No letter

4 of 14 inputs computable; 7 are required, with a score in every sleeve

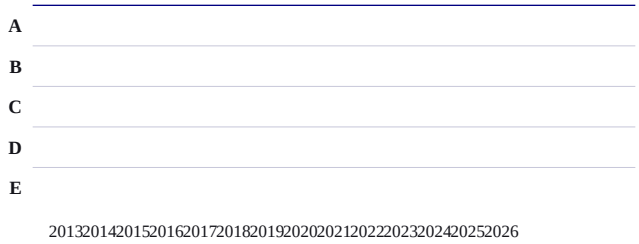
Scoreboard	
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $5.5B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	thin data not computable: dilution, distress
Inputs computable	4 of 14
Graded from	filings received through Jun 11, 2026 151 days before the rescan; latest periodic filing 10-Q received Nov 5, 2026
Last close	$10.84 2026-11-06; market equity $2.1B; 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 Jun 11, 2026

McGraw Hill is a leading global provider of education solutions for K-12, higher education and professional learning markets. We are helping shape the education industry by providing access to effective learning experiences that improve outcomes and opportunities for all. McGraw Hill operates at the intersection of proprietary content, software and data, using artificial intelligence to deliver personalized learning experiences at global scale, driving positive outcomes throughout the entire learning lifecycle. For more than 137 years, McGraw Hill has built one of the world's most recognized education brands with over 100 million active student and educator curriculum licenses worldwide.

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 45.5						
Gross profitability	31.0%	29.8%		45.5	144	2026-03-31
Return on invested capital	not computable	5.6%				

a prior annual debt, equity, and cash observation is required						
Accruals ratio	not computable	(5.1%)				
a prior annual assets observation is required						
Gross margin stability, five years	not computable	1.9 pts				
five annual gross margins are required; found 1						
Solvency, sleeve percentile 79.3						
Twelve-month failure probability	not computable	0.03%				
four consecutive discrete net-income quarters are required; found 4						
Altman Z double-prime	(0.59)	3.11		77.1	119	2026-03-31
Net debt to EBITDA	3.61x	2.54x		74.1	55	2026-03-31
Interest coverage	not computable	2.51x				
one or more required annual facts are missing						
Current ratio	0.77x	1.81x		86.8	153	2026-03-31
Growth and financing						
Revenue growth, three-year compound	not computable	0.2%				
four annual observations are required; found 1						
Free cash flow growth, three-year compound	not computable	14.9%				
four consecutive annual FCF observations are required; found 1						
Reinvestment rate	not computable	11.0%				
a prior annual working-capital observation is required						
Asset growth, three years	not computable	0.2%				
four annual observations are required; found 1						
Net share issuance, one year	not computable	0.03%				
two annual share counts are required; found 1						

Warnings

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

Check	Measured
Thin data	4 of 14 grade factors are computable; minimum is 7

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	17.5%	(1.3%)	69
Distance from 52-week high	(39.6%)	(21.6%)	20
EBIT to enterprise value	6.4%	3.5%	71
Free cash flow yield	11.9%	4.2%	83
Book value to price	0.42	0.55	44
Sales to price	1.01	1.23	47
Composite equity issuance, five years	not computable	(16.7%)	
Relative strength against the sector, log excess return	0.09	(0.09)	69

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score None of 9, period end 2026-03-31	
Return on assets above zero	fail
Operating cash flow above zero	pass
Return on assets improved	fail
Operating cash flow exceeds net income	pass
Long-term leverage fell	fail
Current ratio improved	fail

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No new shares issued	fail
Gross margin improved	fail
Asset turnover improved	fail

Cash, filings, liquidity

Cash and equivalents	$233.0M
Operating cash flow, four quarters	$352.9M
Months of runway	not finite
Days since last periodic filing	4 (10-Q received Nov 5, 2026)
Median daily dollar volume, 63 sessions	$6.6M

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	$1.7B	2026-03-31	2026-06-11	10-K	26-000022
2	assets	us-gaap:Assets	$5.5B	2026-03-31	2026-06-11	10-K	26-000022
3	operating income	us-gaap:OperatingIncomeLoss	$276.8M	2026-03-31	2026-06-11	10-K	26-000022
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$43.8M	2026-03-31	2026-06-11	10-K	26-000022
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$8.5M	2026-03-31	2026-06-11	10-K	26-000022
6	total debt	us-gaap:LongTermDebt	$2.6B	2026-03-31	2026-06-11	10-K	26-000022
7	book equity	us-gaap:StockholdersEquity	$726.2M	2026-03-31	2026-06-11	10-K	26-000022
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$253.5M	2026-03-31	2026-06-11	10-K	26-000022
9	net income	us-gaap:NetIncomeLoss	$35.3M	2026-03-31	2026-06-11	10-K	26-000022
10	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$331.2M	2026-03-31	2026-06-11	10-K	26-000022
11	current assets	us-gaap:AssetsCurrent	$973.6M	2026-03-31	2026-06-11	10-K	26-000022
12	current liabilities	us-gaap:LiabilitiesCurrent	$1.3B	2026-03-31	2026-06-11	10-K	26-000022
13	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$1.2B	2026-03-31	2026-06-11	10-K	26-000022
14	liabilities	us-gaap:Liabilities	$4.8B	2026-03-31	2026-06-11	10-K	26-000022
15	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$361.9M	2026-03-31	2026-06-11	10-K	26-000022
16	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$2.1B	2026-03-31	2026-06-11	10-K	26-000022
17	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$84.9M	2026-03-31	2026-06-11	10-K	26-000022
18	shares outstanding	dei:EntityCommonStockSharesOutstanding	191,276,168	2026-06-04	2026-06-11	10-K	26-000022

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