Archrock, Inc.

AROC

NYSE; utilities; SIC 4922, Natural Gas Transmission; CIK 0001389050

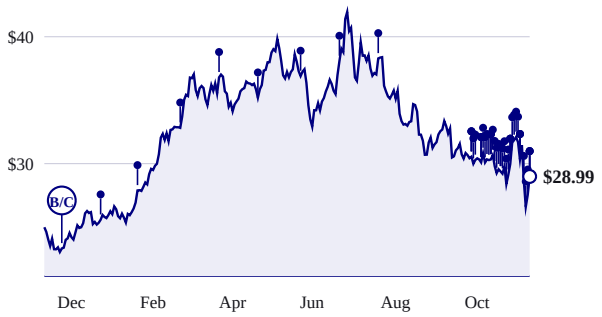
None

No letter

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

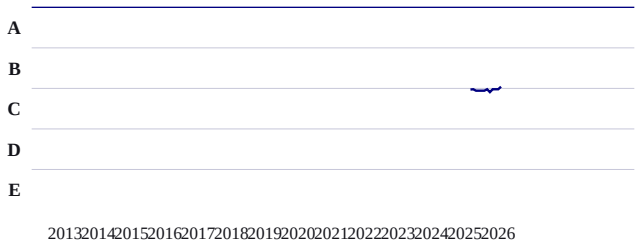
Scoreboard	
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $4.3B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	thin data not computable: distress
Inputs computable	6 of 14
Graded from	filings received through Feb 26, 2026 257 days before the rescan; latest periodic filing 10-Q received Nov 3, 2026
Last close	$29.01 2026-11-09; market equity $5.1B; 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 Feb 26, 2026

We are an energy infrastructure company with a primary focus on midstream natural gas compression and a commitment to helping our customers produce, compress and transport natural gas in a safe and environmentally responsible way. We are a premier provider of natural gas compression services, in terms of total compression fleet horsepower, to customers in the energy industry throughout the U.S., and a leading supplier of aftermarket services to customers that own compression equipment in the U.S. Our business supports a must-run service that is essential to the production, processing, transportation and storage of natural gas.

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 40.8						
Gross profitability	16.6%	17.5%		46.2	81	2025-12-31
Return on invested capital	not computable	6.0%				

one or more required annual facts are missing

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Accruals ratio	(7.3%)	(5.0%)		35.3	270	2025-12-31
Gross margin stability, five years	not computable	4.6 pts				
five consecutive annual gross margins are required						
Solvency, sleeve percentile 24.3						
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	not computable	1.48				
one or more required annual facts are missing						
Net debt to EBITDA	not computable	3.60x				
one or more required annual facts are missing						
Interest coverage	not computable	2.37x				
one or more required annual facts are missing						
Current ratio	1.54x	1.01x		24.3	281	2025-12-31
Growth and financing, sleeve percentile 15.5						
Revenue growth, three-year compound	20.8%	0.7%		5.9	221	2025-12-31
Free cash flow growth, three-year compound	not computable	(11.8%)				
current FCF must be positive and base FCF must exceed $100,000						
Reinvestment rate	not computable	59.0%				
one or more required annual facts are missing						
Asset growth, three years	18.7%	6.3%		14.8	245	2025-12-31
Net share issuance, one year	(0.2%)	0.4%		25.8	156	2026-02-18

Warnings

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

Check	Measured
Thin data	6 of 14 grade factors are computable; minimum is 7

What the price implies

at the 2026-11-09 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	23.2%	6.3%	72
Distance from 52-week high	(30.9%)	(18.6%)	26
EBIT to enterprise value	not computable	4.6%	
Free cash flow yield	2.4%	1.7%	52
Book value to price	0.31	0.52	16
Sales to price	0.29	0.49	29
Composite equity issuance, five years	(12.4%)	(7.0%)	40
Relative strength against the sector, log excess return	0.31	0.02	88

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 8 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	pass
No new shares issued	pass
Gross margin improved	pass
Asset turnover improved	fail

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Cash, filings, liquidity	
Cash and equivalents	$4.1M
Operating cash flow, four quarters	$719.9M
Months of runway	not finite
Days since last periodic filing	7 (10-Q received Nov 3, 2026)
Median daily dollar volume, 63 sessions	$52.7M

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	$723.6M	2025-12-31	2026-02-26	10-K	26-000009
2	assets	us-gaap:Assets	$4.3B	2025-12-31	2026-02-26	10-K	26-000009
3	net income	us-gaap:NetIncomeLoss	$322.3M	2025-12-31	2026-02-26	10-K	26-000009
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$622.1M	2025-12-31	2026-02-26	10-K	26-000009
5	assets	us-gaap:Assets	$3.8B	2024-12-31	2026-02-26	10-K	26-000009
6	current assets	us-gaap:AssetsCurrent	$304.2M	2025-12-31	2026-02-26	10-K	26-000009
7	current liabilities	us-gaap:LiabilitiesCurrent	$197.1M	2025-12-31	2026-02-26	10-K	26-000009
8	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.5B	2025-12-31	2026-02-26	10-K	26-000009
9	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.2B	2024-12-31	2026-02-26	10-K	26-000009
10	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$990.3M	2023-12-31	2026-02-26	10-K	26-000009
11	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$845.6M	2022-12-31	2025-02-25	10-K	25-000009
12	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$502.5M	2025-12-31	2026-02-26	10-K	26-000009
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$429.6M	2024-12-31	2026-02-26	10-K	26-000009
14	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$359.0M	2024-12-31	2026-02-26	10-K	26-000009
15	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$310.2M	2023-12-31	2026-02-26	10-K	26-000009
16	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$298.6M	2023-12-31	2026-02-26	10-K	26-000009
17	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$203.4M	2022-12-31	2025-02-25	10-K	25-000009
18	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$239.9M	2022-12-31	2025-02-25	10-K	25-000009
19	assets	us-gaap:Assets	$2.7B	2023-12-31	2025-02-25	10-K	25-000009
20	assets	us-gaap:Assets	$2.6B	2022-12-31	2024-02-21	10-K	24-000007
21	shares outstanding	dei:EntityCommonStockSharesOutstanding	174,945,882	2026-02-18	2026-02-26	10-K	26-000009
22	shares outstanding	dei:EntityCommonStockSharesOutstanding	175,268,710	2025-02-18	2025-02-25	10-K	25-000009

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