Geospace Technologies Corp. GEOS

Nasdaq; business equipment; SIC 3829, Measuring & Controlling Devices, NEC; CIK 0001001115

D

fourth fifth of 495 graded peers in business equipment

rank 367 of 495; percentile 74.1; sampling error 2.2 points; lower is stronger

A B C D E

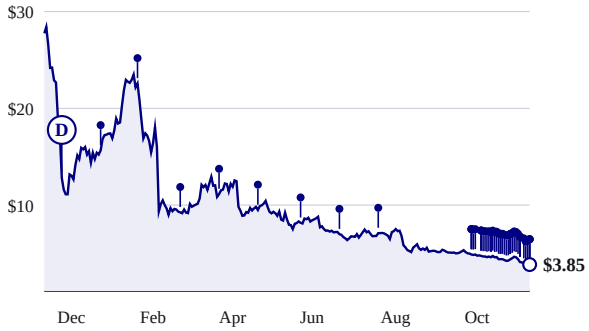
D, the sloth



Scoreboard

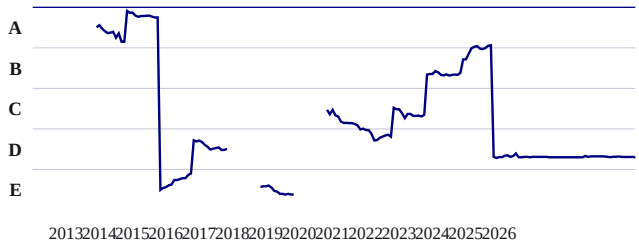
Profitability	D/E percentile 80.1
Solvency	C percentile 45.9
Growth and financing	C percentile 50.0
Reliability	0.87 AUC filers with $120M to $591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025
Peer failure rate	1.03% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$120M to $591M assets total assets $153.0M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	short runway, late filer; fortress balan... not computable: distress
Inputs computable	9 of 14
Graded from	filings received through Nov 21, 2025 354 days before the rescan; latest periodic filing 10-Q received Aug 7, 2026
Last close	$3.79 2026-11-09; market equity $49.0M; 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 Nov 21, 2025

Unless otherwise specified, the discussion in this Annual Report on Form 10-K refers to Geospace Technologies Corporation and its subsidiaries. We design and manufacture sophisticated technology solutions for applications in smart water management, energy exploration, as well as industrial and Internet of Things. Our seismic equipment and services are marketed to the energy industry and used to locate, characterize and monitor hydrocarbon producing reservoirs. We also market our seismic products to other industries for vibration monitoring, border and perimeter security and various geotechnical applications.

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 80.1						
Gross profitability	21.5%	28.7%		61.5	552	2025-09-30
Return on invested capital	not computable	11.4%				

pretax income must exceed the validity floor and imply a 0%-100% tax rate

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Accruals ratio	8.2%	(7.3%)	94.0	615	2025-09-30
Gross margin stability, five years	8.7 pts	2.3 pts	84.8	423	2025-09-30
Solvency, sleeve percentile 45.9					
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	8.01	2.21	11.2	562	2025-09-30
Net debt to EBITDA	not computable	1.08x			
EBITDA must exceed $100,000					
Interest coverage	(66.77x)	3.77x	100.0	87	2025-09-30
Current ratio	3.62x	2.01x	26.6	660	2025-09-30
Growth and financing, sleeve percentile 50.0					
Revenue growth, three-year compound	7.5%	6.5%	46.7	532	2025-09-30
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	not computable	13.5%			
pretax income must exceed the validity floor and imply a 0%-100% tax rate					
Asset growth, three years	4.3%	5.2%	51.1	557	2025-09-30
Net share issuance, one year	0.9%	0.5%	52.3	406	2025-10-31

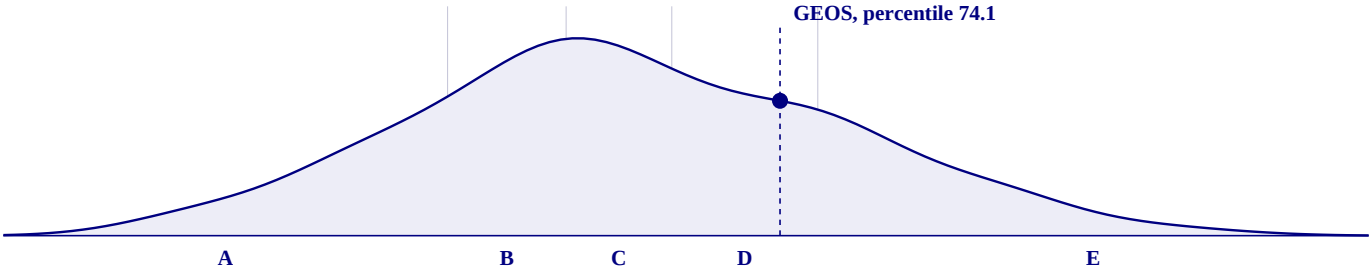
Warnings

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

Check	Measured
Short runway	cash runway is 1.1 months
Late filer	found 1 NT 10-K/Q filings in the last eight quarters
Fortress balance sheet	cash minus debt is 26,338,000 USD; Altman Z is not used

Among 495 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
362	Mercury Systems Inc. (MRCY)	73.1	D	
363	Sensata Technologies Holding plc (ST)	73.3	D	
364	Corsair Gaming, Inc. (CRSR)	73.5	D	
365	DXC Technology Co. (DXC)	73.7	D	
366	Phunware, Inc. (PHUN)	73.9	D	fortress balance sheet
367	Geospace Technologies Corp. (GEOS)	74.1	D	short runway, late filer, fortress balance sheet
368	Gen Digital Inc. (GEN)	74.4	D	
369	Gen Digital Inc. (GENVR)	74.4	D	
370	Bio-Rad Laboratories, Inc. (BIO)	74.8	D	
371	Bio-Rad Laboratories, Inc. (BIO-B)	74.8	D	
372	Bumble Inc. (BMBL)	75.1	D	

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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	(80.7%)	(2.0%)	5
Distance from 52-week high	(86.4%)	(33.6%)	5
EBIT to enterprise value	(24.0%)	1.7%	11
Free cash flow yield	(60.7%)	2.8%	6
Book value to price	1.92	0.27	94
Sales to price	2.22	0.31	89
Composite equity issuance, five years	(5.5%)	4.2%	33
Relative strength against the sector, log excess return	(1.91)	(0.29)	5

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 0 of 9, period end 2025-09-30	
Return on assets above zero	fail
Operating cash flow above zero	fail
Return on assets improved	fail
Operating cash flow exceeds net income	fail
Long-term leverage fell	fail
Current ratio improved	fail
No new shares issued	fail
Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$2.8M
Operating cash flow, four quarters	-$31.5M
Months of runway	1.1
Days since last periodic filing	95 (10-Q received Aug 7, 2026)
Median daily dollar volume, 63 sessions	$409,983

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	$32.9M	2025-09-30	2025-11-21	10-K	25-036009
2	assets	us-gaap:Assets	$153.0M	2025-09-30	2025-11-21	10-K	25-036009
3	operating income	us-gaap:OperatingIncomeLoss	-$11.3M	2025-09-30	2025-11-21	10-K	25-036009
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$9.3M	2025-09-30	2025-11-21	10-K	25-036009
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$388,000	2025-09-30	2025-11-21	10-K	25-036009
6	total debt	us-gaap:LongTermDebt	$0	2025-09-30	2025-11-21	10-K	25-036009
7	book equity	us-gaap:StockholdersEquity	$125.5M	2025-09-30	2025-11-21	10-K	25-036009
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$26.3M	2025-09-30	2025-11-21	10-K	25-036009
9	total debt	us-gaap:LongTermDebt	$0	2024-09-30	2025-11-21	10-K	25-036009
10	book equity	us-gaap:StockholdersEquity	$134.6M	2024-09-30	2025-11-21	10-K	25-036009
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$6.9M	2024-09-30	2025-11-21	10-K	25-036009
12	net income	us-gaap:NetIncomeLoss	-$9.7M	2025-09-30	2025-11-21	10-K	25-036009
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$22.2M	2025-09-30	2025-11-21	10-K	25-036009
14	assets	us-gaap:Assets	$152.2M	2024-09-30	2025-11-21	10-K	25-036009
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$110.8M	2025-09-30	2025-11-21	10-K	25-036009
16	gross profit	us-gaap:GrossProfit	$52.6M	2024-09-30	2025-11-21	10-K	25-036009
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$135.6M	2024-09-30	2025-11-21	10-K	25-036009
18	gross profit	us-gaap:GrossProfit	$51.7M	2023-09-30	2024-11-22	10-K	24-036050

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19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$124.5M	2023-09-30	2024-11-22	10-K	24-036050
20	gross profit	us-gaap:GrossProfit	$18.0M	2022-09-30	2023-11-17	10-K	23-032446
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$89.3M	2022-09-30	2023-11-17	10-K	23-032446
22	gross profit	us-gaap:GrossProfit	$16.3M	2021-09-30	2022-11-18	10-K	22-025429
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$75.9M	2021-09-30	2022-11-18	10-K	22-025429
24	current assets	us-gaap:AssetsCurrent	$88.5M	2025-09-30	2025-11-21	10-K	25-036009
25	current liabilities	us-gaap:LiabilitiesCurrent	$24.4M	2025-09-30	2025-11-21	10-K	25-036009
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$45.6M	2025-09-30	2025-11-21	10-K	25-036009
27	liabilities	us-gaap:Liabilities	$27.5M	2025-09-30	2025-11-21	10-K	25-036009
28	depreciation amortization	us-gaap:Depreciation	$3.8M	2025-09-30	2025-11-21	10-K	25-036009
29	interest expense	us-gaap:InterestExpense	$169,000	2025-09-30	2025-11-21	10-K	25-036009
30	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$8.0M	2025-09-30	2025-11-21	10-K	25-036009
31	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$9.1M	2024-09-30	2025-11-21	10-K	25-036009
32	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$3.9M	2024-09-30	2025-11-21	10-K	25-036009
33	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$15.6M	2023-09-30	2024-11-22	10-K	24-036050
34	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$4.0M	2023-09-30	2024-11-22	10-K	24-036050
35	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$10.0M	2022-09-30	2023-11-17	10-K	23-032446
36	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$1.1M	2022-09-30	2023-11-17	10-K	23-032446
37	current assets	us-gaap:AssetsCurrent	$89.4M	2024-09-30	2025-11-21	10-K	25-036009
38	current liabilities	us-gaap:LiabilitiesCurrent	$17.2M	2024-09-30	2025-11-21	10-K	25-036009
39	assets	us-gaap:Assets	$153.0M	2023-09-30	2024-11-22	10-K	24-036050
40	assets	us-gaap:Assets	$135.1M	2022-09-30	2023-11-17	10-K	23-032446
41	shares outstanding	dei:EntityCommonStockSharesOutstanding	12,820,702	2025-10-31	2025-11-21	10-K	25-036009
42	shares outstanding	dei:EntityCommonStockSharesOutstanding	12,709,381	2024-10-31	2024-11-22	10-K	24-036050

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