Power Solutions International, Inc.

PSIX

Nasdaq; manufacturing; SIC 3510, Engines & Turbines; CIK 0001137091

A/B

on the A/B boundary of 254 graded peers in manufacturing

rank 48 of 254; percentile 18.6; sampling error 3.0 points; lower is stronger

A B C D E

A/B, the bull



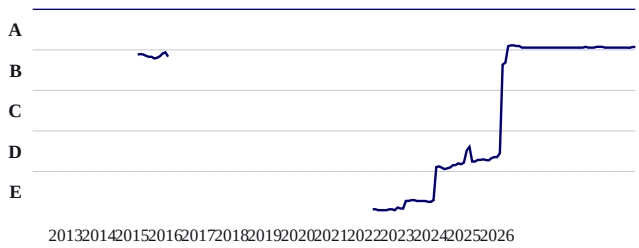
Scoreboard	
Profitability	D percentile 66.4
Solvency	B percentile 25.3
Growth and financing	A/B percentile 20.4
Reliability	0.87 AUC filers with $120M to $591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025
Peer failure rate	1.03% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$120M to $591M assets total assets $424.7M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: dilution, distress
Inputs computable	8 of 14
Graded from	filings received through Apr 30, 2026 195 days before the rescan; latest periodic filing 10-Q received Nov 5, 2026
Last close	$36.49 2026-11-10; market equity $841.7M; 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 2, 2026

Power Solutions International, Inc., incorporated under the laws of the state of Delaware in 2011, designs, engineers, manufactures, markets and sells a broad range of advanced, emission-certified engines and power systems that are powered by a wide variety of clean, alternative fuels, including natural gas, propane, and biofuels, as well as gasoline and diesel options, within the power systems, industrial and transportation end markets. The Company manages the business as a single reportable segment.

The fourteen inputs

lower percentile is stronger; sleeves and inputs within a sleeve carry equal weight

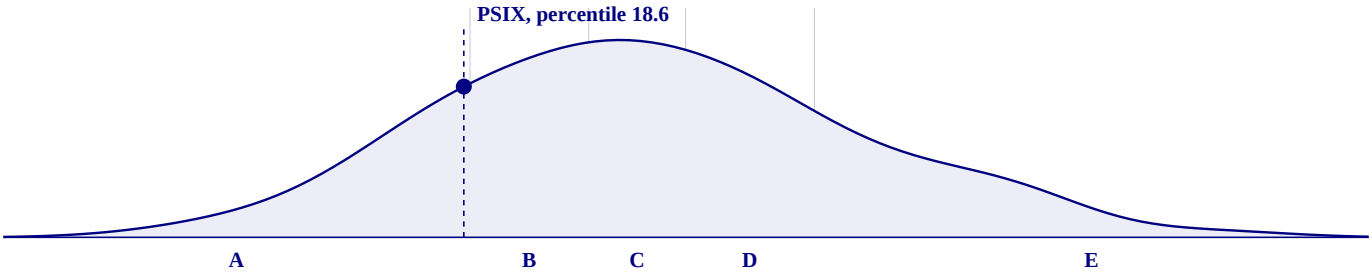
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 66.4						
Gross profitability	43.5%	22.0%		8.8	274	2025-12-31
Return on invested capital	not computable	9.7%				
pretax income must exceed the validity floor and imply a 0%-100% tax rate						
Accruals ratio	23.9%	(3.7%)		100.0	305	2025-12-31

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Gross margin stability, five years	7.0 pts	2.1 pts	90.3	228	2025-12-31
Solvency, sleeve percentile 25.3					
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	5.74	3.72	24.2	241	2025-12-31
Net debt to EBITDA	0.49x	1.77x	24.4	120	2025-12-31
Interest coverage	not computable	5.09x			
latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31					
Current ratio	3.15x	2.26x	27.2	324	2025-12-31
Growth and financing, sleeve percentile 20.4					
Revenue growth, three-year compound	14.5%	2.2%	13.5	268	2025-12-31
Free cash flow growth, three-year compound	not computable	13.7%			
current FCF must be positive and base FCF must exceed $100,000					
Reinvestment rate	not computable	24.5%			
pretax income must exceed the validity floor and imply a 0%-100% tax rate					
Asset growth, three years	9.9%	4.1%	27.3	276	2025-12-31
Net share issuance, one year	not computable	0.0%			
prior share count is 56 days earlier					

Among 254 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
43	Kratos Defense & Security Solutions, Inc. (KTOS)	16.6	A	fortress balance sheet
44	Moog Inc. (MOG-A)	17.2	A/B	
45	Moog Inc. (MOG-B)	17.2	A/B	
46	Douglas Dynamics, Inc. (PLOW)	17.8	A/B	
47	Mueller Water Products, Inc. (MWA)	18.2	A/B	
48	Power Solutions International, Inc. (PSIX)	18.6	A/B	
49	Carpenter Technology Corp. (CRS)	19.0	A/B	
50	Toro Co. (TTC)	19.4	A/B	
51	Miller Industries Inc. (MLR)	19.8	A/B	
52	Taylor Devices, Inc. (TAYD)	20.2	A/B	
53	Idex Corp. (IEX)	20.6	A/B	

What the price implies

at the 2026-11-10 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(46.3%)	9.8%	8
Distance from 52-week high	(63.0%)	(24.7%)	10
EBIT to enterprise value	13.6%	4.2%	96
Free cash flow yield	(3.7%)	3.4%	14
Book value to price	0.28	0.36	36

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Sales to price	0.86	0.54	66
Composite equity issuance, five years	not computable	(9.6%)	
Relative strength against the sector, log excess return	(0.70)	0.01	8

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score None 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	fail
Long-term leverage fell	pass
Current ratio improved	pass
No new shares issued	fail
Gross margin improved	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$72.0M
Operating cash flow, four quarters	$112.0M
Months of runway	not finite
Days since last periodic filing	6 (10-Q received Nov 5, 2026)
Median daily dollar volume, 63 sessions	$16.3M

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	$184.9M	2025-12-31	2026-03-02	10-K	26-013207
2	assets	us-gaap:Assets	$424.7M	2025-12-31	2026-03-02	10-K	26-013207
3	operating income	us-gaap:OperatingIncomeLoss	$109.7M	2025-12-31	2026-03-02	10-K	26-013207
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$103.4M	2025-12-31	2026-03-02	10-K	26-013207
5	income tax	us-gaap:IncomeTaxExpenseBenefit	-$10.6M	2025-12-31	2026-03-02	10-K	26-013207
6	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$96.6M	2025-12-31	2026-03-02	10-K	26-013207
7	book equity	us-gaap:StockholdersEquity	$178.6M	2025-12-31	2026-03-02	10-K	26-013207
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$41.2M	2025-12-31	2026-03-02	10-K	26-013207
9	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$184,000	2024-12-31	2026-03-02	10-K	26-013207
10	book equity	us-gaap:StockholdersEquity	$65.2M	2024-12-31	2026-03-02	10-K	26-013207
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$55.3M	2024-12-31	2026-03-02	10-K	26-013207
12	net income	us-gaap:NetIncomeLoss	$114.0M	2025-12-31	2026-03-02	10-K	26-013207
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$24.1M	2025-12-31	2026-03-02	10-K	26-013207
14	assets	us-gaap:Assets	$328.2M	2024-12-31	2026-03-02	10-K	26-013207
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$722.4M	2025-12-31	2026-03-02	10-K	26-013207
16	gross profit	us-gaap:GrossProfit	$140.5M	2024-12-31	2026-03-02	10-K	26-013207
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$476.0M	2024-12-31	2026-03-02	10-K	26-013207
18	gross profit	us-gaap:GrossProfit	$105.9M	2023-12-31	2025-03-24	10-K	25-000005
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$459.0M	2023-12-31	2025-03-24	10-K	25-000005
20	gross profit	us-gaap:GrossProfit	$88.6M	2022-12-31	2024-03-14	10-K	24-000007
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$481.3M	2022-12-31	2024-03-14	10-K	24-000007
22	gross profit	us-gaap:GrossProfit	$41.3M	2021-12-31	2023-04-14	10-K	23-000004
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$456.3M	2021-12-31	2023-04-14	10-K	23-000004
24	current assets	us-gaap:AssetsCurrent	$290.9M	2025-12-31	2026-03-02	10-K	26-013207
25	current liabilities	us-gaap:LiabilitiesCurrent	$92.3M	2025-12-31	2026-03-02	10-K	26-013207
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$22.5M	2025-12-31	2026-03-02	10-K	26-013207
27	liabilities	us-gaap:Liabilities	$246.1M	2025-12-31	2026-03-02	10-K	26-013207

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28	depreciation amortization	us-gaap:Depreciation	$4.2M	2025-12-31	2026-03-02	10-K	26-013207
29	operating income	us-gaap:OperatingIncomeLoss	$44.3M	2023-12-31	2025-03-24	10-K	25-000005
30	interest expense	us-gaap:InterestExpense	$17.1M	2023-12-31	2024-03-14	10-K	24-000007
31	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesC...	-$23.0M	2015-12-31	2016-02-26	10-K	16-482422
32	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$8.2M	2015-12-31	2016-02-26	10-K	16-482422
33	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesC...	-$15.7M	2014-12-31	2016-02-26	10-K	16-482422
34	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$7.2M	2014-12-31	2016-02-26	10-K	16-482422
35	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$12.4M	2013-12-31	2014-02-28	10-K	14-077913
36	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$6.0M	2013-12-31	2016-02-26	10-K	16-482422
37	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$2.9M	2012-12-31	2014-02-28	10-K	14-077913
38	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$3.9M	2012-12-31	2015-03-13	10-K	15-091420
39	depreciation amortization	us-gaap:Depreciation	$4.0M	2015-12-31	2019-05-16	10-K	19-000016
40	operating income	us-gaap:OperatingIncomeLoss	-$17.4M	2015-12-31	2019-05-16	10-K	19-000016
41	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$13.9M	2015-12-31	2016-02-26	10-K	16-482422
42	income tax	us-gaap:IncomeTaxExpenseBenefit	-$9.7M	2015-12-31	2019-05-16	10-K	19-000016
43	current assets	us-gaap:AssetsCurrent	$249.0M	2015-12-31	2019-05-16	10-K	19-000016
44	current liabilities	us-gaap:LiabilitiesCurrent	$105.9M	2015-12-31	2019-05-16	10-K	19-000016
45	current assets	us-gaap:AssetsCurrent	$202.5M	2014-12-31	2019-05-16	10-K	19-000016
46	current liabilities	us-gaap:LiabilitiesCurrent	$87.6M	2014-12-31	2019-05-16	10-K	19-000016
47	assets	us-gaap:Assets	$284.3M	2023-12-31	2025-03-24	10-K	25-000005
48	assets	us-gaap:Assets	$319.9M	2022-12-31	2024-03-14	10-K	24-000007
49	shares outstanding	dei:EntityCommonStockSharesOutstanding	23,050,450	2026-04-23	2026-04-30	10-K/A	26-196674
50	shares outstanding	dei:EntityCommonStockSharesOutstanding	23,050,450	2026-02-26	2026-03-02	10-K	26-013207