Chicago Rivet & Machine Co. CVR

NYSE; manufacturing; SIC 3540, Metalworkg Machinery & Equipment; CIK 0000019871

D

fourth fifth of 254 graded peers in manufacturing

rank 169 of 254; percentile 66.4; sampling error 3.0 points; lower is stronger

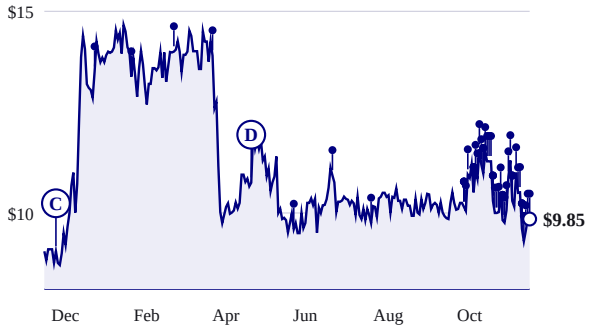
A B C D E

D, the sloth



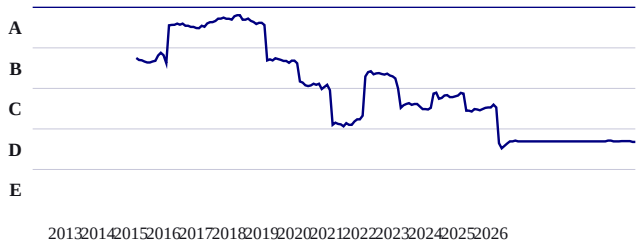
Scoreboard	
Profitability	D/E percentile 78.0
Solvency	A percentile 9.9
Growth and financing	D percentile 75.4
Reliability	0.83 AUC filers with $12.5M to $120M assets; 95% interval 0.79 to 0.86; 201 events, 2020 to 2025
Peer failure rate	1.07% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$12.5M to $120M assets total assets $23.3M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	short runway; fortress balance sheet not computable: distress
Inputs computable	8 of 14
Graded from	filings received through Mar 24, 2026 235 days before the rescan; latest periodic filing 10-Q received Nov 6, 2026
Last close	$9.26 2026-11-10; market equity $8.9M; 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 24, 2026

" of this Annual Report on Form 10-K under the caption "Information about our Executive Officers." The Company has adopted a code of ethics for its principal executive officer and principal financial officer, and other senior officers. A copy of the code of ethics was filed as Exhibit 14 to the Company's Annual Report on Form 10-K filed on March 29, 2005. The Company will provide a copy of its code of ethics to any person without charge, upon request to the Company's Corporate Secretary, Chicago Rivet & Machine Co., 27755 Diehl Road, Warrenville, Illinois 60555.

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 78.0						
Gross profitability	17.7%	22.0%		61.2	274	2025-12-31
Return on invested capital	not computable	9.7%				

required facts have no common fiscal period end

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Accruals ratio	0.6%	(3.7%)	81.8	303	2025-12-31
Gross margin stability, five years	7.5 pts	2.1 pts	91.2	228	2025-12-31
Solvency, sleeve percentile 9.9					
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	9.83	3.72	7.6	239	2025-12-31
Net debt to EBITDA	not computable	1.77x			
EBITDA must exceed $100,000					
Interest coverage	not computable	5.09x			
one or more required annual facts are missing					
Current ratio	5.21x	2.26x	12.1	322	2025-12-31
Growth and financing, sleeve percentile 75.4					
Revenue growth, three-year compound	(6.1%)	2.2%	84.6	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%			
NOPAT must exceed $100,000					
Asset growth, three years	(11.5%)	4.1%	92.3	274	2025-12-31
Net share issuance, one year	0.0%	0.0%	49.2	240	2026-03-23

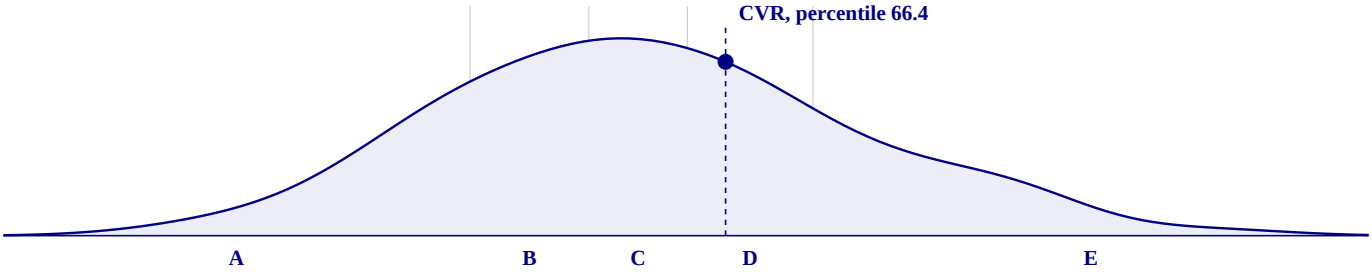
Warnings

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

Check	Measured
Short runway	cash runway is 4.7 months
Fortress balance sheet	cash minus debt is 1,922,679 USD; Altman Z is not used

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
164	Manitowoc Co. Inc. (MTW)	64.4	D	
165	Yunhong Green CTI Ltd. (YHGJ)	64.8	D	short runway, late filer
166	Myers Industries Inc. (MYE)	65.2	D	
167	Helios Technologies, Inc. (HLIO)	65.6	D	
168	Sylvamo Corp. (SLVM)	66.0	D	
169	Chicago Rivet & Machine Co. (CVR)	66.4	D	short runway, fortress balance sheet
170	Graham Corp. (GHM)	66.8	D	fortress balance sheet
171	Latham Group, Inc. (SWIM)	67.2	D	
172	Hyster-Yale, Inc. (HY)	67.6	D	
173	Park Ohio Holdings Corp. (PKOH)	68.0	D	
174	Arts WAY Manufacturing Co. Inc. (ARTW)	68.4	D	

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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	19.0%	9.8%	59
Distance from 52-week high	(32.8%)	(25.1%)	38
EBIT to enterprise value	(13.5%)	4.1%	7
Free cash flow yield	(16.4%)	3.4%	9
Book value to price	1.74	0.36	96
Sales to price	2.93	0.54	92
Composite equity issuance, five years	(11.8%)	(9.6%)	43
Relative strength against the sector, log excess return	0.09	0.01	59

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	fail
Operating cash flow above zero	fail
Return on assets improved	pass
Operating cash flow exceeds net income	fail
Long-term leverage fell	fail
Current ratio improved	fail
No new shares issued	pass
Gross margin improved	pass
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$633,933
Operating cash flow, four quarters	-$1.6M
Months of runway	4.7
Days since last periodic filing	8 (10-Q received Nov 6, 2026)
Median daily dollar volume, 63 sessions	$16,367

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	$4.1M	2025-12-31	2026-03-24	10-K	26-000004
2	assets	us-gaap:Assets	$23.3M	2025-12-31	2026-03-24	10-K	26-000004
3	net income	us-gaap:NetIncomeLoss	-$1.1M	2025-12-31	2026-03-24	10-K	26-000004
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$1.2M	2025-12-31	2026-03-24	10-K	26-000004
5	assets	us-gaap:Assets	$23.4M	2024-12-31	2026-03-24	10-K	26-000004
6	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$27.9M	2025-12-31	2026-03-24	10-K	26-000004
7	gross profit	us-gaap:GrossProfit	$1.1M	2024-12-31	2026-03-24	10-K	26-000004
8	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$27.0M	2024-12-31	2026-03-24	10-K	26-000004
9	gross profit	us-gaap:GrossProfit	-$599,590	2023-12-31	2025-03-28	10-K	25-046656
10	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$31.5M	2023-12-31	2025-03-28	10-K	25-046656
11	gross profit	us-gaap:GrossProfit	$3.8M	2022-12-31	2024-03-28	10-K	24-080560
12	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$33.6M	2022-12-31	2024-03-28	10-K	24-080560
13	gross profit	us-gaap:GrossProfit	$6.5M	2021-12-31	2023-03-29	10-K	23-083675
14	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$34.0M	2021-12-31	2023-03-29	10-K	23-083675
15	current assets	us-gaap:AssetsCurrent	$12.2M	2025-12-31	2026-03-24	10-K	26-000004
16	current liabilities	us-gaap:LiabilitiesCurrent	$2.3M	2025-12-31	2026-03-24	10-K	26-000004
17	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$21.2M	2025-12-31	2026-03-24	10-K	26-000004
18	operating income	us-gaap:OperatingIncomeLoss	-$1.2M	2025-12-31	2026-03-24	10-K	26-000004

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19	book equity	us-gaap:StockholdersEquity	$18.8M	2025-12-31	2026-03-24	10-K	26-000004
20	liabilities	us-gaap:Liabilities	$4.5M	2025-12-31	2026-03-24	10-K	26-000004
21	total debt	us-gaap:LongTermDebt	$0	2024-12-31	2025-03-28	10-K	25-046656
22	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$1.9M	2024-12-31	2026-03-24	10-K	26-000004
23	operating income	us-gaap:OperatingIncomeLoss	-$5.2M	2024-12-31	2026-03-24	10-K	26-000004
24	depreciation amortization	us-gaap:Depreciation	$1.2M	2024-12-31	2026-03-24	10-K	26-000004
25	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$331,669	2025-12-31	2026-03-24	10-K	26-000004
26	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$153,451	2024-12-31	2026-03-24	10-K	26-000004
27	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$651,398	2024-12-31	2025-03-28	10-K	25-046656
28	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$1.9M	2023-12-31	2025-03-28	10-K	25-046656
29	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$1.1M	2023-12-31	2025-03-28	10-K	25-046656
30	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$1.3M	2022-12-31	2024-03-28	10-K	24-080560
31	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$969,943	2022-12-31	2024-03-28	10-K	24-080560
32	depreciation amortization	us-gaap:Depreciation	$1.2M	2025-12-31	2026-03-24	10-K	26-000004
33	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$1.2M	2025-12-31	2026-03-24	10-K	26-000004
34	income tax	us-gaap:IncomeTaxExpenseBenefit	-$95,096	2025-12-31	2026-03-24	10-K	26-000004
35	current assets	us-gaap:AssetsCurrent	$12.6M	2024-12-31	2026-03-24	10-K	26-000004
36	current liabilities	us-gaap:LiabilitiesCurrent	$2.2M	2024-12-31	2026-03-24	10-K	26-000004
37	assets	us-gaap:Assets	$27.8M	2023-12-31	2025-03-28	10-K	25-046656
38	assets	us-gaap:Assets	$33.6M	2022-12-31	2024-03-28	10-K	24-080560
39	shares outstanding	dei:EntityCommonStockSharesOutstanding	966,132	2026-03-23	2026-03-24	10-K	26-000004
40	shares outstanding	dei:EntityCommonStockSharesOutstanding	966,132	2025-03-21	2025-03-28	10-K	25-046656

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