Gentherm Inc.

THRM

Nasdaq; consumer durables; SIC 3714, Motor Vehicle Parts & Accessories; CIK 0000903129

A

strongest fifth of 457 graded peers in the pooled consumer gr...

rank 77 of 457; percentile 17.3; sampling error 2.3 points; lower is stronger

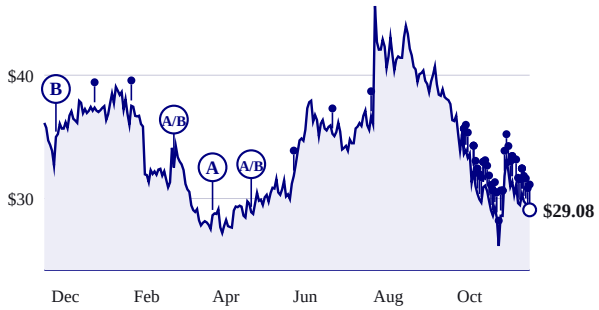
A B C D E

A, the bull



Scoreboard	
Profitability	C percentile 54.7
Solvency	B percentile 25.6
Growth and financing	B percentile 29.7
Reliability	0.91 AUC filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025
Peer failure rate	1.01% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$591M to $2.67B assets total assets $1.4B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress
Inputs computable	11 of 14
Graded from	filings received through Feb 19, 2026 268 days before the rescan; latest periodic filing 10-Q received Oct 22, 2026
Last close	$29.08 2026-11-13; market equity $1.5B; 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 19, 2026

Unless otherwise indicated, references to "Gentherm", "the Company", "we", "our" and "us" in this Annual Report refer to Gentherm Incorporated and its consolidated subsidiaries. Except to the extent expressly noted herein, the content of our website or the websites of other third parties noted herein are not incorporated by reference in this Annual Report. Gentherm Incorporated is a global market leader of innovative thermal management and pneumatic comfort technologies. Our automotive products include Climate Control Seats (CCS®), Climate Control Interiors (CCI?), Lumbar and Massage Comfort Solutions, Valve Systems, and Climate and Comfort Electronics.

The fourteen inputs

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

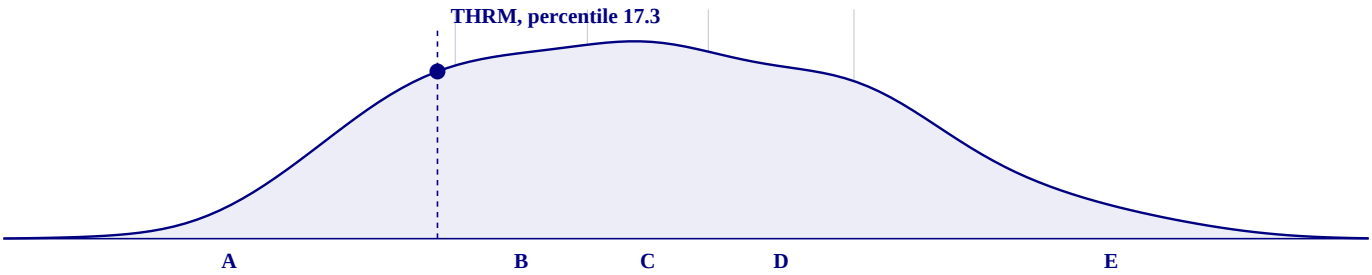
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 54.7						
Gross profitability	25.9%	34.4%		62.0	472	2025-12-31
Return on invested capital	5.8%	8.9%		60.5	163	2025-12-31

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Accruals ratio	(7.5%)	(5.1%)	35.6	520	2025-12-31
Gross margin stability, five years	2.2 pts	1.7 pts	60.6	405	2025-12-31
Solvency, sleeve percentile 25.6					
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	4.93	2.09	22.2	398	2025-12-31
Net debt to EBITDA	0.22x	2.11x	18.5	185	2025-12-31
Interest coverage	not computable	2.76x			
one or more required annual facts are missing					
Current ratio	1.92x	1.60x	36.2	540	2025-12-31
Growth and financing, sleeve percentile 29.7					
Revenue growth, three-year compound	7.5%	1.4%	20.9	479	2025-12-31
Free cash flow growth, three-year compound	not computable	7.0%			
current FCF must be positive and base FCF must exceed $100,000					
Reinvestment rate	91.9%	22.2%	21.2	265	2025-12-31
Asset growth, three years	4.1%	2.0%	37.2	482	2025-12-31
Net share issuance, one year	(0.9%)	(0.2%)	39.6	382	2026-02-13

Among 457 peers

consumer durables; 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
72	Modine Manufacturing Co. (MOD)	16.4	A	
73	Rush Enterprises Inc. \Tx\ (RUSHA)	16.5	A	
74	Rush Enterprises Inc. \Tx\ (RUSHB)	16.5	A	
75	Simply Good Foods Co. (SMPL)	16.8	A/B	
76	BJ's Wholesale Club Holdings, Inc. (BJ)	17.1	A/B	
77	Gentherm Inc. (THRM)	17.3	A	
78	Applied Industrial Technologies Inc. (AIT)	17.5	A/B	
79	Interface Inc. (TILE)	17.6	A/B	
80	Dick'S Sporting Goods, Inc. (DKS)	17.9	A/B	fortress balance sheet
81	Acuity Inc. (De) (AYI)	18.0	A/B	
82	Build-A-Bear Workshop Inc. (BBW)	18.3	A/B	

What the price implies

at the 2026-11-13 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(15.1%)	(1.9%)	36
Distance from 52-week high	(36.2%)	(21.9%)	30
EBIT to enterprise value	5.2%	4.8%	56
Free cash flow yield	4.0%	4.1%	49
Book value to price	0.47	0.43	53
Sales to price	0.98	1.42	39

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Composite equity issuance, five years	46.6%	(16.0%)	93
Relative strength against the sector, log excess return	(0.07)	0.04	40

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 6 of 9, period end 2025-12-31	
Return on assets above zero	pass
Operating cash flow above zero	pass
Return on assets improved	fail
Operating cash flow exceeds net income	pass
Long-term leverage fell	pass
Current ratio improved	fail
No new shares issued	pass
Gross margin improved	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$252.1M
Operating cash flow, four quarters	$65.0M
Months of runway	not finite
Days since last periodic filing	23 (10-Q received Oct 22, 2026)
Median daily dollar volume, 63 sessions	$24.2M

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	$362.2M	2025-12-31	2026-02-19	10-K	26-059602
2	assets	us-gaap:Assets	$1.4B	2025-12-31	2026-02-19	10-K	26-059602
3	operating income	us-gaap:OperatingIncomeLoss	$82.7M	2025-12-31	2026-02-19	10-K	26-059602
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$35.8M	2025-12-31	2026-02-19	10-K	26-059602
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$17.6M	2025-12-31	2026-02-19	10-K	26-059602
6	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$189.0M	2025-12-31	2026-02-19	10-K	26-059602
7	book equity	us-gaap:StockholdersEquity	$720.3M	2025-12-31	2026-02-19	10-K	26-059602
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$160.8M	2025-12-31	2026-02-19	10-K	26-059602
9	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$220.1M	2024-12-31	2026-02-19	10-K	26-059602
10	book equity	us-gaap:StockholdersEquity	$616.9M	2024-12-31	2026-02-19	10-K	26-059602
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$134.1M	2024-12-31	2026-02-19	10-K	26-059602
12	net income	us-gaap:ProfitLoss	$18.3M	2025-12-31	2026-02-19	10-K	26-059602
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$116.8M	2025-12-31	2026-02-19	10-K	26-059602
14	assets	us-gaap:Assets	$1.2B	2024-12-31	2026-02-19	10-K	26-059602
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.5B	2025-12-31	2026-02-19	10-K	26-059602
16	gross profit	us-gaap:GrossProfit	$366.4M	2024-12-31	2026-02-19	10-K	26-059602
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.5B	2024-12-31	2026-02-19	10-K	26-059602
18	gross profit	us-gaap:GrossProfit	$351.6M	2023-12-31	2026-02-19	10-K	26-059602
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.5B	2023-12-31	2026-02-19	10-K	26-059602
20	gross profit	us-gaap:GrossProfit	$273.6M	2022-12-31	2025-02-19	10-K	25-023344
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.2B	2022-12-31	2025-02-19	10-K	25-023344
22	gross profit	us-gaap:GrossProfit	$303.6M	2021-12-31	2024-02-21	10-K	24-018007
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.0B	2021-12-31	2024-02-21	10-K	24-018007
24	current assets	us-gaap:AssetsCurrent	$777.0M	2025-12-31	2026-02-19	10-K	26-059602
25	current liabilities	us-gaap:LiabilitiesCurrent	$404.3M	2025-12-31	2026-02-19	10-K	26-059602
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$714.1M	2025-12-31	2026-02-19	10-K	26-059602
27	liabilities	us-gaap:Liabilities	$676.1M	2025-12-31	2026-02-19	10-K	26-059602
28	depreciation amortization	us-gaap:Depreciation	$45.8M	2025-12-31	2026-02-19	10-K	26-059602
29	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$55.7M	2025-12-31	2026-02-19	10-K	26-059602

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30	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$109.6M	2024-12-31	2026-02-19	10-K	26-059602
31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$73.3M	2024-12-31	2026-02-19	10-K	26-059602
32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$119.3M	2023-12-31	2026-02-19	10-K	26-059602
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$37.6M	2023-12-31	2026-02-19	10-K	26-059602
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$14.9M	2022-12-31	2025-02-19	10-K	25-023344
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$39.7M	2022-12-31	2025-02-19	10-K	25-023344
36	current assets	us-gaap:AssetsCurrent	$684.0M	2024-12-31	2026-02-19	10-K	26-059602
37	current liabilities	us-gaap:LiabilitiesCurrent	$340.3M	2024-12-31	2026-02-19	10-K	26-059602
38	assets	us-gaap:Assets	$1.2B	2023-12-31	2025-02-19	10-K	25-023344
39	assets	us-gaap:Assets	$1.2B	2022-12-31	2024-02-21	10-K	24-018007
40	shares outstanding	dei:EntityCommonStockSharesOutstanding	30,526,465	2026-02-13	2026-02-19	10-K	26-059602
41	shares outstanding	dei:EntityCommonStockSharesOutstanding	30,788,989	2025-02-13	2025-02-19	10-K	25-023344

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