Sifco Industries Inc.

SIF

NYSE; manufacturing; SIC 3724, Aircraft Engines & Engine Parts; CIK 0000090168

E

weakest fifth of 254 graded peers in manufacturing

rank 216 of 254; percentile 85.0; sampling error 3.0 points; lower is stronger

A B C D E

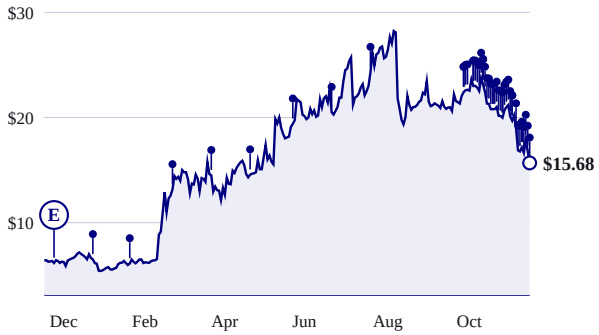
E, the bear



Scoreboard

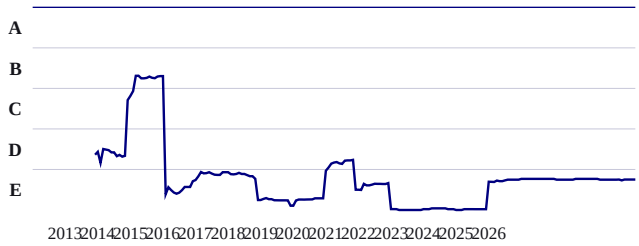
Profitability	D/E percentile 77.2
Solvency	C percentile 44.3
Growth and financing	D percentile 66.6
Reliability	0.83 AUC filers with $12.5M to $120M assets; 95% interval 0.79 to 0.86; 201 events, 2020 to 2025
Peer failure rate	1.07% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$12.5M to $120M assets total assets $73.4M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered; fortress balance sheet not computable: short runway, distress
Inputs computable	8 of 14
Graded from	filings received through Dec 22, 2025 328 days before the rescan; latest periodic filing 10-Q received Aug 10, 2026
Last close	$15.40 2026-11-13; market equity $96.3M; 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 Dec 22, 2025

SIFCO Industries, Inc. ("SIFCO," "Company," "we" or "our"), an Ohio corporation, was incorporated in 1916. The executive offices of the Company are located at 970 East 64th Street, Cleveland, Ohio 44103, and its telephone number is (216) 881-8600. SIFCO is engaged in the production of forgings, sub-assemblies, and machined components primarily for the Aerospace and Energy ("A&E") markets. The Company's processes and services include forging, heat-treating, chemical processing and machining. The Company's operations are conducted in a single business 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 77.2						
Gross profitability	14.4%	22.0%		73.6	274	2025-09-30
Return on invested capital	not computable	9.7%				
prior invested-capital observation is 731 days earlier						

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Accruals ratio	(1.0%)	(3.7%)	73.5	303	2025-09-30
Gross margin stability, five years	5.2 pts	2.1 pts	84.6	228	2025-09-30
Solvency, sleeve percentile 44.3					
Twelve-month failure probability	not computable	0.04%			
liabilities and a nearby cover-page share count are required at 2026-06-30					
Altman Z double-prime	not computable	3.72			
one or more required annual facts are missing					
Net debt to EBITDA	(0.08x)	1.77x	17.6	120	2025-09-30
Interest coverage	not computable	5.09x			
latest aligned inputs end 2023-09-30; latest annual assets end 2025-09-30					
Current ratio	1.58x	2.26x	71.0	322	2025-09-30
Growth and financing, sleeve percentile 66.6					
Revenue growth, three-year compound	0.4%	2.2%	60.3	268	2025-09-30
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	(9.0%)	4.1%	87.2	274	2025-09-30
Net share issuance, one year	0.06%	0.0%	52.3	240	2025-12-05

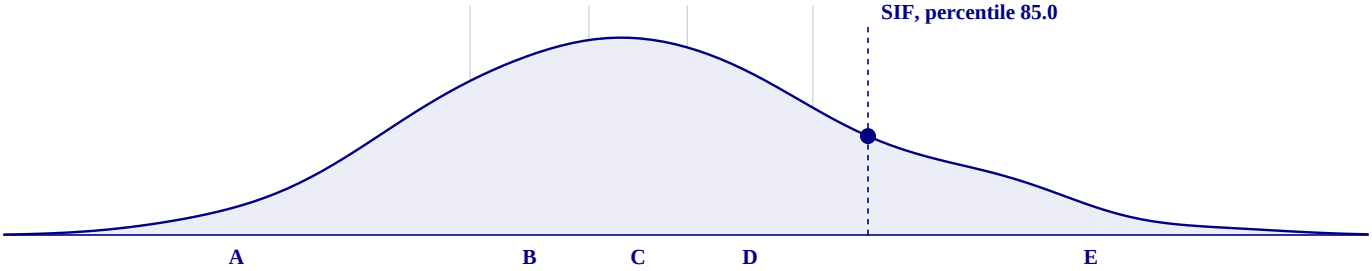
Warnings

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

Check	Measured
Fortress balance sheet	cash minus debt is 440,000 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
211	Polaris Inc. (PII)	83.0	E	
212	Millerknoll, Inc. (MLKN)	83.4	E	
213	Moving iMAGE Technologies Inc. (MITQ)	83.8	E	fortress balance sheet
214	Hillman Solutions Corp. (HLMN)	84.2	E	
215	O-I Glass, Inc. (OI)	84.6	E	
216	Sifco Industries Inc. (SIF)	85.0	E	fortress balance sheet
217	Clearwater Paper Corp. (CLW)	85.4	E	
218	Smurfit Westrock plc (SW)	85.8	E	
219	MasterCraft Boat Holdings, Inc. (MCFT)	86.2	E	dilution
220	Worthington Enterprises, Inc. (WOR)	86.6	E	
221	IT Tech Packaging, Inc. (ITP)	87.0	E	late filer, fortress balance sheet

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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	208.0%	9.8%	100
Distance from 52-week high	(44.5%)	(25.1%)	25
EBIT to enterprise value	0.2%	4.1%	21
Free cash flow yield	(0.4%)	3.4%	22
Book value to price	0.42	0.36	56
Sales to price	0.86	0.54	66
Composite equity issuance, five years	5.6%	(9.6%)	74
Relative strength against the sector, log excess return	1.04	0.01	100

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 5 of 9, period end 2025-09-30	
Return on assets above zero	fail
Operating cash flow above zero	pass
Return on assets improved	pass
Operating cash flow exceeds net income	pass
Long-term leverage fell	fail
Current ratio improved	pass
No new shares issued	fail
Gross margin improved	pass
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$77,000
Operating cash flow, four quarters	$4.1M
Months of runway	not finite
Days since last periodic filing	97 (10-Q received Aug 10, 2026)
Median daily dollar volume, 63 sessions	$1.1M

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	$10.6M	2025-09-30	2025-12-22	10-K	25-058405
2	assets	us-gaap:Assets	$73.4M	2025-09-30	2025-12-22	10-K	25-058405
3	operating income	us-gaap:OperatingIncomeLoss	$180,000	2025-09-30	2025-12-22	10-K	25-058405
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$748,000	2025-09-30	2025-12-22	10-K	25-058405
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$185,000	2025-09-30	2025-12-22	10-K	25-058405
6	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$51,000	2025-09-30	2025-12-22	10-K	25-058405
7	book equity	us-gaap:StockholdersEquity	$36.9M	2025-09-30	2025-12-22	10-K	25-058405
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$491,000	2025-09-30	2025-12-22	10-K	25-058405
9	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$2.5M	2023-09-30	2024-01-02	10-K	23-000083
10	book equity	us-gaap:StockholdersEquity	$34.3M	2023-09-30	2025-12-22	10-K	25-058405
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$21,000	2023-09-30	2024-12-26	10-K	24-000060
12	net income	us-gaap:NetIncomeLoss	-$729,000	2025-09-30	2025-12-22	10-K	25-058405
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesC...	$127,000	2025-09-30	2025-12-22	10-K	25-058405
14	assets	us-gaap:Assets	$104.6M	2024-09-30	2025-12-22	10-K	25-058405
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$84.8M	2025-09-30	2025-12-22	10-K	25-058405
16	gross profit	us-gaap:GrossProfit	$6.0M	2024-09-30	2025-12-22	10-K	25-058405
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$79.6M	2024-09-30	2025-12-22	10-K	25-058405
18	gross profit	us-gaap:GrossProfit	$3.3M	2023-09-30	2024-12-26	10-K	24-000060

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19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$66.1M	2023-09-30	2024-12-26	10-K	24-000060
20	gross profit	us-gaap:GrossProfit	-$1.9M	2022-09-30	2024-01-02	10-K	23-000083
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$83.9M	2022-09-30	2024-01-02	10-K	23-000083
22	gross profit	us-gaap:GrossProfit	$11.2M	2021-09-30	2022-12-23	10-K	22-000053
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$99.6M	2021-09-30	2022-12-23	10-K	22-000053
24	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$5.0M	2025-09-30	2025-12-22	10-K	25-058405
25	operating income	us-gaap:OperatingIncomeLoss	-$9.0M	2023-09-30	2024-12-26	10-K	24-000060
26	interest expense	us-gaap:InterestExpense	$1.3M	2023-09-30	2024-01-02	10-K	23-000083
27	current assets	us-gaap:AssetsCurrent	$35.1M	2025-09-30	2025-12-22	10-K	25-058405
28	current liabilities	us-gaap:LiabilitiesCurrent	$22.2M	2025-09-30	2025-12-22	10-K	25-058405
29	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$484,000	2025-09-30	2025-12-22	10-K	25-058405
30	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesC...	-$2.6M	2024-09-30	2025-12-22	10-K	25-058405
31	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$2.0M	2024-09-30	2025-12-22	10-K	25-058405
32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$1.4M	2023-09-30	2024-01-02	10-K	23-000083
33	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$1.1M	2023-09-30	2024-12-26	10-K	24-000060
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$298,000	2022-09-30	2024-01-02	10-K	23-000083
35	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$3.2M	2022-09-30	2024-01-02	10-K	23-000083
36	current assets	us-gaap:AssetsCurrent	$54.3M	2024-09-30	2025-12-22	10-K	25-058405
37	current liabilities	us-gaap:LiabilitiesCurrent	$54.0M	2024-09-30	2025-12-22	10-K	25-058405
38	assets	us-gaap:Assets	$96.3M	2023-09-30	2024-12-26	10-K	24-000060
39	assets	us-gaap:Assets	$97.3M	2022-09-30	2024-01-02	10-K	23-000083
40	shares outstanding	dei:EntityCommonStockSharesOutstanding	6,173,688	2025-12-05	2025-12-22	10-K	25-058405
41	shares outstanding	dei:EntityCommonStockSharesOutstanding	6,170,051	2024-12-03	2024-12-26	10-K	24-000060

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