Gorman Rupp Co.

GRC

NYSE; manufacturing; SIC 3561, Pumps & Pumping Equipment; CIK 0000042682

C

middle fifth of 244 graded peers in manufacturing

rank 131 of 244; percentile 53.5; sampling error 3.0 points; lower is stronger

A B C D E

C, the tortoise



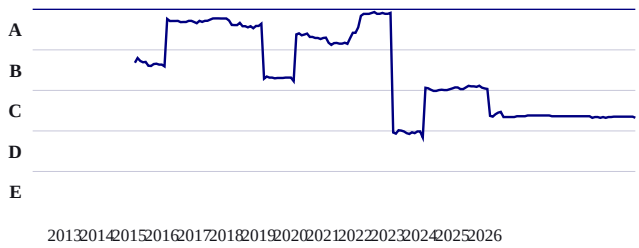
Scoreboard	
Profitability	C percentile 43.4
Solvency	C percentile 49.1
Growth and financing	C/D percentile 58.5
Reliability	0.91 AUC filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025
Peer failure rate	1.01% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$591M to $2.67B assets total assets $860.1M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress
Inputs computable	11 of 13
Graded from	filings received through Mar 2, 2026 260 days before the rescan; latest periodic filing 10-Q received Oct 26, 2026
Last close	$68.31 2026-11-16; market equity $1.8B; 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

The Gorman-Rupp Company ("Registrant", "Gorman-Rupp", the "Company", "we" or "our") was incorporated in Ohio in 1934. The Company designs, manufactures and globally sells pumps and pump systems for use in water, wastewater, construction, dewatering, industrial, petroleum, original equipment, agriculture, fire suppression, heating, ventilating and air conditioning ("HVAC"), military and other liquid-handling applications. The Company operates in one business segment, the manufacture and sale of pumps and pump systems. The following table sets forth, for the years 2023 through 2025, the total net sales, income before income taxes and year-end total assets of the Company.

The thirteen 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 43.4						
Gross profitability	24.3%	22.2%		37.1	265	2025-12-31
Return on invested capital	10.4%	9.8%		46.9	97	2025-12-31

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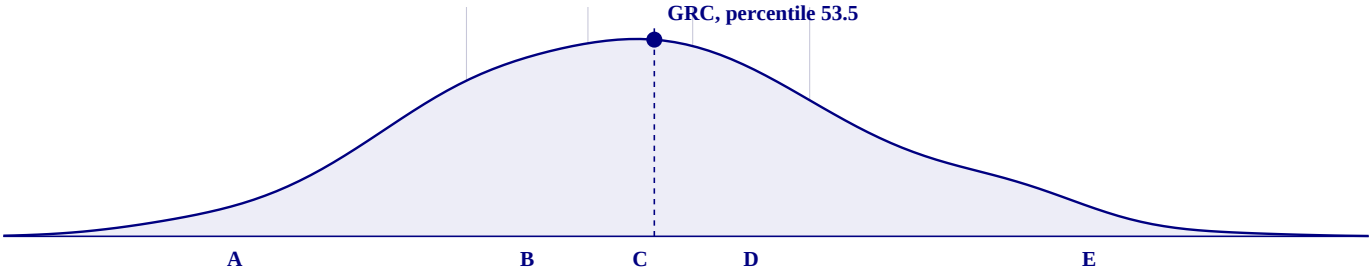
Accruals ratio	(6.2%)	(3.7%)	30.6	285	2025-12-31
Gross margin stability, five years	2.6 pts	2.1 pts	59.1	221	2025-12-31
Solvency, sleeve percentile 49.1					
Altman Z double-prime	4.34	3.60	36.8	221	2025-12-31
Net debt to EBITDA	2.21x	1.76x	66.4	117	2025-12-31
Interest coverage	not computable	5.13x			
latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31					
Current ratio	2.37x	2.27x	44.1	300	2025-12-31
Growth and financing, sleeve percentile 58.5					
Revenue growth, three-year compound	9.4%	2.2%	24.7	260	2025-12-31
Free cash flow growth, three-year compound	not computable	13.5%			
current FCF must be positive and base FCF must exceed $100,000					
Reinvestment rate	(11.7%)	25.7%	76.3	136	2025-12-31
Asset growth, three years	(0.5%)	4.1%	71.5	264	2025-12-31
Net share issuance, one year	0.3%	0.0%	61.5	240	2026-03-02

Among 244 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
126	Hayward Holdings, Inc. (HAYW)	51.4	C	
127	Karat Packaging Inc. (KRT)	51.9	C	
128	Rocket Lab Corp. (RKLB)	52.3	C	fortress balance sheet
129	Caterpillar Inc. (CAT)	52.7	C	
130	Agco Corp. (AGCO)	53.1	C	
131	Gorman Rupp Co. (GRC)	53.5	C	
132	Owens Corning (OC)	53.9	C	
133	Greenland Technologies Holding Corp. (GTEC)	54.3	C	dilution, fortress balance sheet
134	General Dynamics Corp. (GD)	54.7	C	
135	Eastern Co. (EML)	55.1	C	
136	Timken Co. (TKR)	55.6	C	

What the price implies

at the 2026-11-16 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	67.6%	9.9%	86
Distance from 52-week high	(25.5%)	(27.1%)	55
EBIT to enterprise value	4.8%	4.2%	56
Free cash flow yield	4.9%	3.6%	65
Book value to price	0.26	0.37	32
Sales to price	0.38	0.56	31
Composite equity issuance, five years	(9.7%)	(9.7%)	50
Relative strength against the sector, log excess return	0.43	0.01	86

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Twelve-month failure probability, CHS model	not computable	0.04%

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	pass
Operating cash flow exceeds net income	pass
Long-term leverage fell	pass
Current ratio improved	fail
No new shares issued	fail
Gross margin improved	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$59.3M
Operating cash flow, four quarters	$129.9M
Months of runway	not finite
Days since last periodic filing	22 (10-Q received Oct 26, 2026)
Median daily dollar volume, 63 sessions	$10.7M

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	$209.1M	2025-12-31	2026-03-02	10-K	26-084820
2	assets	us-gaap:Assets	$860.1M	2025-12-31	2026-03-02	10-K	26-084820
3	operating income	us-gaap:OperatingIncomeLoss	$95.4M	2025-12-31	2026-03-02	10-K	26-084820
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$69.2M	2025-12-31	2026-03-02	10-K	26-084820
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$16.1M	2025-12-31	2026-03-02	10-K	26-084820
6	total debt	us-gaap:LongTermDebt	$307.5M	2025-12-31	2026-03-02	10-K	26-084820
7	book equity	us-gaap:StockholdersEquity	$414.7M	2025-12-31	2026-03-02	10-K	26-084820
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$35.1M	2025-12-31	2026-03-02	10-K	26-084820
9	total debt	us-gaap:LongTermDebt	$366.6M	2024-12-31	2026-03-02	10-K	26-084820
10	book equity	us-gaap:StockholdersEquity	$373.8M	2024-12-31	2026-03-02	10-K	26-084820
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$24.2M	2024-12-31	2026-03-02	10-K	26-084820
12	net income	us-gaap:NetIncomeLoss	$53.0M	2025-12-31	2026-03-02	10-K	26-084820
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$106.2M	2025-12-31	2026-03-02	10-K	26-084820
14	assets	us-gaap:Assets	$858.5M	2024-12-31	2026-03-02	10-K	26-084820
15	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$682.4M	2025-12-31	2026-03-02	10-K	26-084820
16	gross profit	us-gaap:GrossProfit	$204.3M	2024-12-31	2026-03-02	10-K	26-084820
17	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$659.7M	2024-12-31	2026-03-02	10-K	26-084820
18	gross profit	us-gaap:GrossProfit	$196.3M	2023-12-31	2026-03-02	10-K	26-084820
19	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$659.5M	2023-12-31	2026-03-02	10-K	26-084820
20	gross profit	us-gaap:GrossProfit	$130.9M	2022-12-31	2025-03-03	10-K	25-005856
21	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$521.0M	2022-12-31	2025-03-03	10-K	25-005856
22	gross profit	us-gaap:GrossProfit	$95.9M	2021-12-31	2024-02-26	10-K	24-005519
23	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$378.3M	2021-12-31	2024-02-26	10-K	24-005519
24	current assets	us-gaap:AssetsCurrent	$233.7M	2025-12-31	2026-03-02	10-K	26-084820
25	current liabilities	us-gaap:LiabilitiesCurrent	$98.6M	2025-12-31	2026-03-02	10-K	26-084820
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$418.5M	2025-12-31	2026-03-02	10-K	26-084820
27	liabilities	us-gaap:Liabilities	$445.3M	2025-12-31	2026-03-02	10-K	26-084820
28	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$27.7M	2025-12-31	2026-03-02	10-K	26-084820
29	operating income	us-gaap:OperatingIncomeLoss	$87.0M	2023-12-31	2026-03-02	10-K	26-084820
30	interest expense	us-gaap:InterestExpense	$41.3M	2023-12-31	2024-02-26	10-K	24-005519

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31	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$17.4M	2025-12-31	2026-03-02	10-K	26-084820
32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$69.8M	2024-12-31	2026-03-02	10-K	26-084820
33	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$14.3M	2024-12-31	2026-03-02	10-K	26-084820
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$98.2M	2023-12-31	2026-03-02	10-K	26-084820
35	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$20.8M	2023-12-31	2026-03-02	10-K	26-084820
36	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$13.7M	2022-12-31	2025-03-03	10-K	25-005856
37	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$18.0M	2022-12-31	2025-03-03	10-K	25-005856
38	current assets	us-gaap:AssetsCurrent	$220.8M	2024-12-31	2026-03-02	10-K	26-084820
39	current liabilities	us-gaap:LiabilitiesCurrent	$87.5M	2024-12-31	2026-03-02	10-K	26-084820
40	assets	us-gaap:Assets	$890.4M	2023-12-31	2025-03-03	10-K	25-005856
41	assets	us-gaap:Assets	$872.8M	2022-12-31	2024-02-26	10-K	24-005519
42	shares outstanding	dei:EntityCommonStockSharesOutstanding	26,312,842	2026-03-02	2026-03-02	10-K	26-084820
43	shares outstanding	dei:EntityCommonStockSharesOutstanding	26,227,540	2025-03-03	2025-03-03	10-K	25-005856

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