Intest Corp.

INTT

NYSE; business equipment; SIC 3825, Instruments For Meas & Testing of Electricity & Elec Signals; CIK 0001036262

B

second fifth of 469 graded peers in business equipment

rank 177 of 469; percentile 37.6; sampling error 2.3 points; lower is stronger

A B C D E

B, the elk



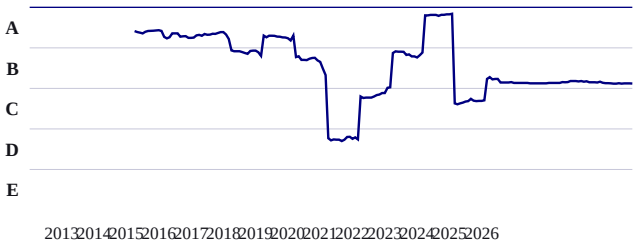
Scoreboard	
Profitability	C percentile 49.0
Solvency	B percentile 34.2
Growth and financing	C percentile 52.1
Reliability	0.87 AUC filers with $120M to $591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025
Peer failure rate	1.03% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$120M to $591M assets total assets $151.3M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered; fortress balance sheet not computable: distress
Inputs computable	8 of 13
Graded from	filings received through Mar 12, 2026 250 days before the rescan; latest periodic filing 10-Q received Nov 6, 2026
Last close	$12.65 2026-11-16; market equity $162.4M; 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 12, 2026

InTest Corporation, headquartered in Mount Laurel, New Jersey, was incorporated in New Jersey in 1981 and reincorporated in Delaware in April 1997. We completed our initial public offering in June 1997 and currently trade on the NYSE American stock exchange under the symbol "INTT." The consolidated entity is comprised of InTest Corporation and our wholly owned subsidiaries which comprise our six businesses: Electro Mechanical Semiconductor ("EMS"), Acculogic, Alfamation?, InTest Thermal Solutions ("ITS"), Ambrell® and Videology®.

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 49.0						
Gross profitability	32.3%	29.1%		41.5	512	2025-12-31
Return on invested capital	not computable	11.2%				

latest aligned inputs end 2024-12-31; latest annual assets end 2025-12-31

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Accruals ratio	(6.5%)	(7.4%)	56.3	566	2025-12-31
Gross margin stability, five years	2.3 pts	2.3 pts	49.1	406	2025-12-31
Solvency, sleeve percentile 34.2					
Altman Z double-prime	4.89	2.19	23.9	516	2025-12-31
Net debt to EBITDA	not computable	1.15x			
latest aligned inputs end 2024-12-31; latest annual assets end 2025-12-31					
Interest coverage	not computable	4.90x			
latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31					
Current ratio	2.20x	1.98x	44.5	599	2025-12-31
Growth and financing, sleeve percentile 52.1					
Revenue growth, three-year compound	(0.9%)	6.4%	71.1	502	2025-12-31
Free cash flow growth, three-year compound	not computable	18.2%			
current FCF must be positive and base FCF must exceed $100,000					
Reinvestment rate	not computable	14.3%			
NOPAT must exceed $100,000					
Asset growth, three years	11.2%	5.0%	31.7	519	2025-12-31
Net share issuance, one year	1.0%	0.5%	53.5	405	2026-02-27

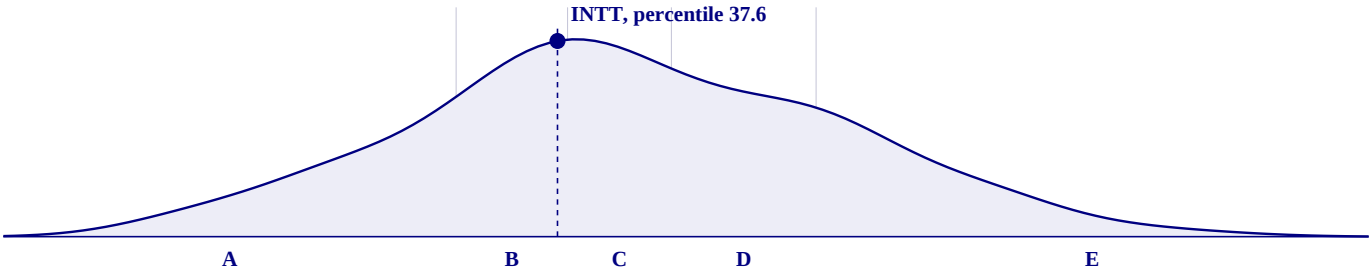
Warnings

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

Check	Measured
Fortress balance sheet	cash minus debt is 11,888,000 USD; Altman Z is not used

Among 469 peers

business equipment; 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
172	Extreme Networks Inc. (EXTR)	36.5	B	fortress balance sheet
173	Data I/O Corp. (DAIO)	36.8	B	late filer
174	Match Group, Inc. (MTCH)	37.0	B	
175	Egain Corp. (EGAN)	37.2	B	
176	indie Semiconductor, Inc. (INDI)	37.4	B	
177	Intest Corp. (INTT)	37.6	B	fortress balance sheet
178	10x Genomics, Inc. (TXG)	37.8	B/C	fortress balance sheet
179	Silicon Laboratories Inc. (SLAB)	38.0	B/C	
180	Agilent Technologies, Inc. (A)	38.2	B/C	
181	Legalzoom.Com, Inc. (LZ)	38.5	B/C	
182	Plexus Corp. (PLXS)	38.7	B/C	fortress balance sheet

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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	39.5%	(2.0%)	75
Distance from 52-week high	(33.1%)	(36.5%)	55
EBIT to enterprise value	(2.5%)	1.8%	26
Free cash flow yield	3.5%	2.9%	54
Book value to price	0.68	0.28	78
Sales to price	0.70	0.32	69
Composite equity issuance, five years	18.2%	4.4%	67
Relative strength against the sector, log excess return	0.06	(0.29)	75
Twelve-month failure probability, CHS model	not computable	0.05%	

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 4 of 9, period end 2025-12-31	
Return on assets above zero	fail
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	fail
Gross margin improved	pass
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$12.9M
Operating cash flow, four quarters	-$1.5M
Months of runway	100.6
Days since last periodic filing	11 (10-Q received Nov 6, 2026)
Median daily dollar volume, 63 sessions	$1.5M

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	$48.9M	2025-12-31	2026-03-12	10-K	26-000012
2	assets	us-gaap:Assets	$151.3M	2025-12-31	2026-03-12	10-K	26-000012
3	operating income	us-gaap:OperatingIncomeLoss	$3.4M	2024-12-31	2026-03-12	10-K	26-000012
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$3.5M	2024-12-31	2026-03-12	10-K	26-000012
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$563,000	2024-12-31	2026-03-12	10-K	26-000012
6	total debt	us-gaap:LongTermDebt	$7.9M	2024-12-31	2025-03-13	10-K	25-007520
7	book equity	us-gaap:StockholdersEquity	$99.8M	2024-12-31	2026-03-12	10-K	26-000012
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$19.8M	2024-12-31	2026-03-12	10-K	26-000012
9	total debt	us-gaap:LongTermDebt	$12.0M	2023-12-31	2024-03-27	10-K	24-009626
10	book equity	us-gaap:StockholdersEquity	$96.3M	2023-12-31	2026-03-12	10-K	26-000012
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$45.3M	2023-12-31	2025-03-13	10-K	25-007520
12	net income	us-gaap:NetIncomeLoss	-$2.5M	2025-12-31	2026-03-12	10-K	26-000012
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$7.3M	2025-12-31	2026-03-12	10-K	26-000012
14	assets	us-gaap:Assets	$152.3M	2024-12-31	2026-03-12	10-K	26-000012
15	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$113.8M	2025-12-31	2026-03-12	10-K	26-000012
16	gross profit	us-gaap:GrossProfit	$55.4M	2024-12-31	2026-03-12	10-K	26-000012
17	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$130.7M	2024-12-31	2026-03-12	10-K	26-000012

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18	gross profit	us-gaap:GrossProfit	$57.0M	2023-12-31	2025-03-13	10-K	25-007520
19	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$123.3M	2023-12-31	2025-03-13	10-K	25-007520
20	gross profit	us-gaap:GrossProfit	$53.4M	2022-12-31	2024-03-27	10-K	24-009626
21	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$116.8M	2022-12-31	2024-03-27	10-K	24-009626
22	gross profit	us-gaap:GrossProfit	$41.2M	2021-12-31	2023-03-22	10-K	23-007539
23	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$84.9M	2021-12-31	2023-03-22	10-K	23-007539
24	current assets	us-gaap:AssetsCurrent	$78.6M	2025-12-31	2026-03-12	10-K	26-000012
25	current liabilities	us-gaap:LiabilitiesCurrent	$35.8M	2025-12-31	2026-03-12	10-K	26-000012
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$42.6M	2025-12-31	2026-03-12	10-K	26-000012
27	operating income	us-gaap:OperatingIncomeLoss	-$3.7M	2025-12-31	2026-03-12	10-K	26-000012
28	book equity	us-gaap:StockholdersEquity	$103.6M	2025-12-31	2026-03-12	10-K	26-000012
29	liabilities	us-gaap:Liabilities	$47.7M	2025-12-31	2026-03-12	10-K	26-000012
30	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$5.4M	2024-12-31	2026-03-12	10-K	26-000012
31	operating income	us-gaap:OperatingIncomeLoss	$10.4M	2023-12-31	2025-03-13	10-K	25-007520
32	interest expense	us-gaap:InterestExpense	$679,000	2023-12-31	2024-03-27	10-K	24-009626
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$1.6M	2025-12-31	2026-03-12	10-K	26-000012
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$3.8M	2024-12-31	2026-03-12	10-K	26-000012
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$1.3M	2024-12-31	2026-03-12	10-K	26-000012
36	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$16.2M	2023-12-31	2025-03-13	10-K	25-007520
37	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$1.3M	2023-12-31	2025-03-13	10-K	25-007520
38	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$1.4M	2022-12-31	2024-03-27	10-K	24-009626
39	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$1.4M	2022-12-31	2024-03-27	10-K	24-009626
40	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$6.8M	2025-12-31	2026-03-12	10-K	26-000012
41	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$3.2M	2025-12-31	2026-03-12	10-K	26-000012
42	income tax	us-gaap:IncomeTaxExpenseBenefit	-$695,000	2025-12-31	2026-03-12	10-K	26-000012
43	current assets	us-gaap:AssetsCurrent	$78.8M	2024-12-31	2026-03-12	10-K	26-000012
44	current liabilities	us-gaap:LiabilitiesCurrent	$31.9M	2024-12-31	2026-03-12	10-K	26-000012
45	assets	us-gaap:Assets	$134.8M	2023-12-31	2025-03-13	10-K	25-007520
46	assets	us-gaap:Assets	$110.1M	2022-12-31	2024-03-27	10-K	24-009626
47	shares outstanding	dei:EntityCommonStockSharesOutstanding	12,495,544	2026-02-27	2026-03-12	10-K	26-000012
48	shares outstanding	dei:EntityCommonStockSharesOutstanding	12,373,276	2025-03-01	2025-03-13	10-K	25-007520

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