Littelfuse Inc.

LFUS

Nasdaq; manufacturing; SIC 3613, Switchgear & Switchboard Apparatus; CIK 0000889331

B/C

on the B/C boundary of 244 graded peers in manufacturing

rank 103 of 244; percentile 42.0; sampling error 3.0 points; lower is stronger

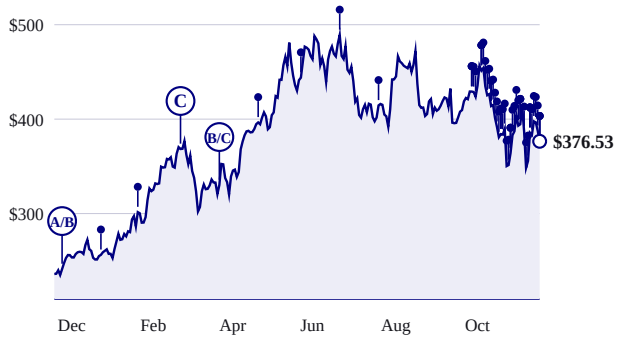
A B C D E

B/C, the elk



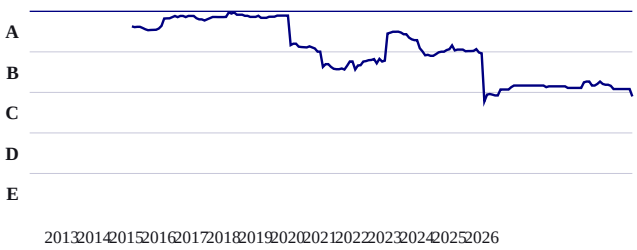
Scoreboard	
Profitability	B percentile 25.9
Solvency	C percentile 44.3
Growth and financing	D percentile 70.5
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $4.0B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	late filer
Inputs computable	10 of 13
Graded from	filings received through Feb 19, 2026 271 days before the rescan; latest periodic filing 10-Q received Oct 28, 2026
Last close	$376.29 2026-11-16; market equity $9.6B; 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

Littelfuse, Inc., was incorporated under the laws of the State of Delaware in 1991. References herein to the "Company," "we," "our" or "Littelfuse" refer to Littelfuse, Inc. and its subsidiaries. References herein to "2025", "fiscal 2025" or "fiscal year 2025" refer to the fiscal year ended December 27, 2025. References herein to "2024", "fiscal 2024" or "fiscal year 2024" refer to the fiscal year ended December 28, 2024. References herein to "2023", "fiscal 2023" or "fiscal year 2023" refer to the fiscal year ended December 30, 2023. The Company operates on a 52-53 week fiscal year (4-4-5 basis) ending on the Saturday closest to December 31.

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 25.9						
Gross profitability	22.9%	22.2%		42.8	265	2025-12-27
Return on invested capital	not computable	9.8%				
pretax income must exceed the validity floor and imply a 0%-100% tax rate						

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Accruals ratio	(12.9%)	(3.7%)	12.7	285	2025-12-27
Gross margin stability, five years	1.3 pts	2.1 pts	22.3	221	2025-12-27
Solvency, sleeve percentile 44.3					
Altman Z double-prime	4.60	3.60	32.7	221	2025-12-27
Net debt to EBITDA	2.13x	1.76x	63.8	117	2025-12-27
Interest coverage	not computable	5.13x			
latest aligned inputs end 2023-12-30; latest annual assets end 2025-12-27					
Current ratio	2.69x	2.27x	36.5	300	2025-12-27
Growth and financing, sleeve percentile 70.5					
Revenue growth, three-year compound	(1.7%)	2.2%	68.3	260	2025-12-27
Free cash flow growth, three-year compound	5.1%	13.5%	66.9	137	2025-12-27
Reinvestment rate	not computable	25.7%			
pretax income must exceed the validity floor and imply a 0%-100% tax rate					
Asset growth, three years	0.5%	4.1%	66.9	264	2025-12-27
Net share issuance, one year	1.6%	0.0%	79.9	240	2026-02-13

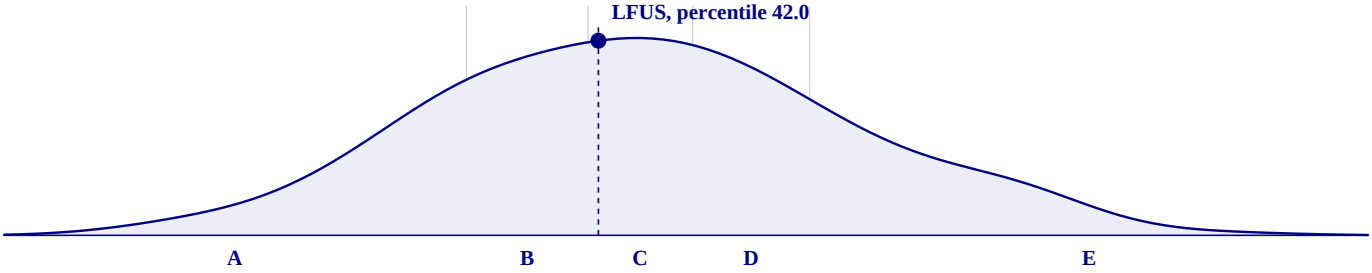
Warnings

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

Check	Measured
Late filer	found 1 NT 10-K/Q filings in the last eight quarters

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
98	Virco MFG Corporation (VIRC)	39.9	B/C	fortress balance sheet
99	Bloom Energy Corp. (BE)	40.3	B/C	
100	OIL States International, Inc. (OIS)	40.7	B/C	fortress balance sheet
101	TransDigm Group Inc. (TDG)	41.2	B/C	
102	Friedman Industries Inc. (FRD)	41.6	B/C	
103	Littelfuse Inc. (LFUS)	42.0	B/C	late filer
104	Standex International (SXI)	42.4	B/C	
105	Generac Holdings Inc. (GNRC)	42.8	B/C	
106	Belden Inc. (BDC)	43.2	C	
107	Packaging Corp. OF America (PKG)	43.6	C	dilution
108	Honeywell International Inc. (HON)	44.0	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	75.7%	9.9%	89
Distance from 52-week high	(23.0%)	(27.1%)	60
EBIT to enterprise value	0.4%	4.2%	22

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Free cash flow yield	3.8%	3.6%	53
Book value to price	0.28	0.37	38
Sales to price	0.25	0.56	19
Composite equity issuance, five years	(2.0%)	(9.7%)	62
Relative strength against the sector, log excess return	0.48	0.01	89
Twelve-month failure probability, CHS model	0.03%	0.04%	25

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 5 of 9, period end 2025-12-27	
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	pass
Cash, filings, liquidity	
Cash and equivalents	$824.8M
Operating cash flow, four quarters	$595.3M
Months of runway	not finite
Days since last periodic filing	20 (10-Q received Oct 28, 2026)
Median daily dollar volume, 63 sessions	$82.8M

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	$906.0M	2025-12-27	2026-02-19	10-K	26-009585
2	assets	us-gaap:Assets	$4.0B	2025-12-27	2026-02-19	10-K	26-009585
3	operating income	us-gaap:OperatingIncomeLoss	$37.5M	2025-12-27	2026-02-19	10-K	26-009585
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$3.6M	2025-12-27	2026-02-19	10-K	26-009585
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$75.3M	2025-12-27	2026-02-19	10-K	26-009585
6	total debt	us-gaap:LongTermDebt	$802.6M	2025-12-27	2026-02-19	10-K	26-009585
7	book equity	us-gaap:StockholdersEquity	$2.4B	2025-12-27	2026-02-19	10-K	26-009585
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$563.4M	2025-12-27	2026-02-19	10-K	26-009585
9	total debt	us-gaap:LongTermDebt	$856.1M	2024-12-28	2026-02-19	10-K	26-009585
10	book equity	us-gaap:StockholdersEquity	$2.4B	2024-12-28	2026-02-19	10-K	26-009585
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$724.9M	2024-12-28	2026-02-19	10-K	26-009585
12	net income	us-gaap:NetIncomeLoss	-$71.7M	2025-12-27	2026-02-19	10-K	26-009585
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$433.8M	2025-12-27	2026-02-19	10-K	26-009585
14	assets	us-gaap:Assets	$3.9B	2024-12-28	2026-02-19	10-K	26-009585
15	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$2.4B	2025-12-27	2026-02-19	10-K	26-009585
16	gross profit	us-gaap:GrossProfit	$787.5M	2024-12-28	2026-02-19	10-K	26-009585
17	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$2.2B	2024-12-28	2026-02-19	10-K	26-009585
18	gross profit	us-gaap:GrossProfit	$900.2M	2023-12-30	2026-02-19	10-K	26-009585
19	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$2.4B	2023-12-30	2026-02-19	10-K	26-009585
20	gross profit	us-gaap:GrossProfit	$1.0B	2022-12-31	2025-03-13	10-K	25-000039
21	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$2.5B	2022-12-31	2025-03-13	10-K	25-000039
22	gross profit	us-gaap:GrossProfit	$771.9M	2022-01-01	2024-02-16	10-K	24-000034
23	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$2.1B	2022-01-01	2024-02-16	10-K	24-000034
24	current assets	us-gaap:AssetsCurrent	$1.4B	2025-12-27	2026-02-19	10-K	26-009585

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25	current liabilities	us-gaap:LiabilitiesCurrent	$532.8M	2025-12-27	2026-02-19	10-K	26-009585
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$1.7B	2025-12-27	2026-02-19	10-K	26-009585
27	liabilities	us-gaap:Liabilities	$1.5B	2025-12-27	2026-02-19	10-K	26-009585
28	depreciation amortization	us-gaap:Depreciation	$74.9M	2025-12-27	2026-02-19	10-K	26-009585
29	operating income	us-gaap:OperatingIncomeLoss	$360.9M	2023-12-30	2026-02-19	10-K	26-009585
30	interest expense	us-gaap:InterestExpense	$39.9M	2023-12-30	2024-02-16	10-K	24-000034
31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$67.6M	2025-12-27	2026-02-19	10-K	26-009585
32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$367.6M	2024-12-28	2026-02-19	10-K	26-009585
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$75.9M	2024-12-28	2026-02-19	10-K	26-009585
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$457.4M	2023-12-30	2026-02-19	10-K	26-009585
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$86.2M	2023-12-30	2026-02-19	10-K	26-009585
36	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$419.7M	2022-12-31	2025-03-13	10-K	25-000039
37	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$104.3M	2022-12-31	2025-03-13	10-K	25-000039
38	current assets	us-gaap:AssetsCurrent	$1.6B	2024-12-28	2026-02-19	10-K	26-009585
39	current liabilities	us-gaap:LiabilitiesCurrent	$433.9M	2024-12-28	2026-02-19	10-K	26-009585
40	assets	us-gaap:Assets	$4.0B	2023-12-30	2025-03-13	10-K	25-000039
41	assets	us-gaap:Assets	$3.9B	2022-12-31	2024-02-16	10-K	24-000034
42	shares outstanding	dei:EntityCommonStockSharesOutstanding	25,107,673	2026-02-13	2026-02-19	10-K	26-009585
43	shares outstanding	dei:EntityCommonStockSharesOutstanding	24,713,072	2025-03-07	2025-03-13	10-K	25-000039

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