Stoneridge Inc.

SRI

NYSE; consumer durables; SIC 3714, Motor Vehicle Parts & Accessories; CIK 0001043337

B

second fifth of 429 graded peers in the pooled consumer group

rank 133 of 429; percentile 31.3; sampling error 2.4 points; lower is stronger

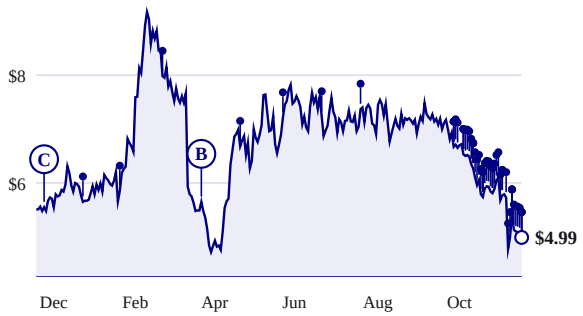
A B C D E

B, the elk



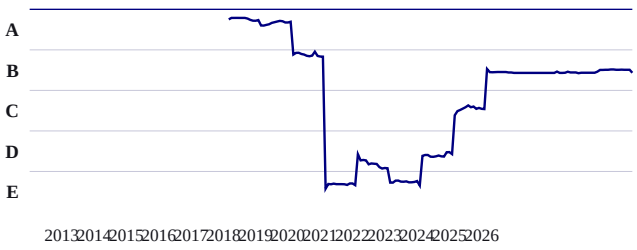
Scoreboard	
Profitability	B percentile 28.5
Solvency	B percentile 27.6
Growth and financing	D percentile 71.0
Reliability	0.87 AUC filers with $120M to $591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025
Peer failure rate	1.03% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$120M to $591M assets total assets $551.2M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	late filer not computable: distress
Inputs computable	7 of 13
Graded from	filings received through Mar 16, 2026 246 days before the rescan; latest periodic filing 10-Q received Nov 4, 2026
Last close	$4.98 2026-11-16; market equity $142.2M; 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 16, 2026

Founded in 1965, Stoneridge, Inc. (the "Company") is a global supplier of safe and efficient electronics systems and technologies. Our systems and products power vehicle intelligence, while enabling safety and security for on-and off-highway transportation sectors around the world. Our worldwide footprint is primarily comprised of 21 locations in 14 countries and enables us to supply global commercial, automotive, off-highway, agricultural and other vehicle markets.

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 28.5						
Gross profitability	31.1%	35.0%		54.4	440	2025-12-31
Return on invested capital	not computable	9.2%				
pretax income must exceed the validity floor and imply a 0%-100% tax rate						
Accruals ratio	(23.3%)	(5.1%)		9.5	487	2025-12-31

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Gross margin stability, five years	0.8 pts	1.7 pts		21.7	379	2025-12-31
Solvency, sleeve percentile 27.6						
Altman Z double-prime	not computable	2.13				
one or more required annual facts are missing						
Net debt to EBITDA	not computable	2.08x				
EBITDA must exceed $100,000						
Interest coverage	not computable	2.97x				
latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31						
Current ratio	2.30x	1.57x		27.6	501	2025-12-31
Growth and financing, sleeve percentile 71.0						
Revenue growth, three-year compound	(1.5%)	1.5%		62.9	448	2025-12-31
Free cash flow growth, three-year compound	not computable	7.3%				
current FCF must be positive and base FCF must exceed $100,000						
Reinvestment rate	not computable	18.0%				
pretax income must exceed the validity floor and imply a 0%-100% tax rate						
Asset growth, three years	(5.5%)	2.0%		75.1	450	2025-12-31
Net share issuance, one year	1.2%	(0.2%)		75.2	380	2026-03-01

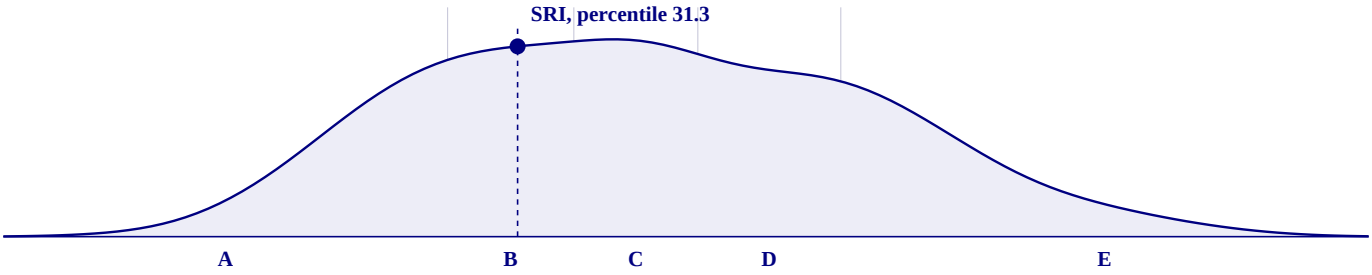
Warnings

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 429 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
128	Chefs' Warehouse, Inc. (CHEF)	30.5	B	
129	Ethan Allen Interiors Inc. (ETD)	30.6	B	fortress balance sheet
130	Freshpet, Inc. (FRPT)	30.8	B	
131	Ingles Markets Inc. (IMKTA)	31.0	B	late filer
132	Knowles Corp. (KN)	31.1	B	
133	Stoneridge Inc. (SRI)	31.3	B	late filer
134	GAP Inc. (GAP)	31.4	B	fortress balance sheet
135	Acushnet Holdings Corp. (GOLF)	31.6	B	
136	Biglari Holdings Inc. (BH)	31.8	B	
137	Natural Grocers by Vitamin Cottage, Inc. (NGVC)	32.2	B	
138	Pepsico Inc. (PEP)	32.5	B	

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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	(2.3%)	(1.3%)	49
Distance from 52-week high	(45.6%)	(22.8%)	19
EBIT to enterprise value	(14.8%)	4.8%	16
Free cash flow yield	8.5%	4.3%	72
Book value to price	0.87	0.44	73
Sales to price	6.04	1.44	88
Composite equity issuance, five years	5.6%	(16.7%)	81
Relative strength against the sector, log excess return	0.07	0.03	54
Twelve-month failure probability, CHS model	not computable	0.04%	

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 3 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	fail
Current ratio improved	fail
No new shares issued	fail
Gross margin improved	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$63.4M
Operating cash flow, four quarters	$13.9M
Months of runway	not finite
Days since last periodic filing	13 (10-Q received Nov 4, 2026)
Median daily dollar volume, 63 sessions	$959,338

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	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$861.3M	2025-12-31	2026-03-16	10-K	26-000023
2	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$690.1M	2025-12-31	2026-03-16	10-K	26-000023
3	assets	us-gaap:Assets	$551.2M	2025-12-31	2026-03-16	10-K	26-000023
4	operating income	us-gaap:OperatingIncomeLoss	-$38.6M	2025-12-31	2026-03-16	10-K	26-000023
5	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$55.5M	2025-12-31	2026-03-16	10-K	26-000023
6	income tax	us-gaap:IncomeTaxExpenseBenefit	$47.4M	2025-12-31	2026-03-16	10-K	26-000023
7	total debt	us-gaap:LongTermDebt	$180.9M	2025-12-31	2026-03-16	10-K	26-000023
8	book equity	us-gaap:StockholdersEquity	$179.8M	2025-12-31	2026-03-16	10-K	26-000023
9	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$66.3M	2025-12-31	2026-03-16	10-K	26-000023
10	total debt	us-gaap:LongTermDebt	$201.6M	2024-12-31	2025-03-03	10-K	25-000012
11	book equity	us-gaap:StockholdersEquity	$245.3M	2024-12-31	2026-03-16	10-K	26-000023
12	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$71.8M	2024-12-31	2026-03-16	10-K	26-000023
13	net income	us-gaap:NetIncomeLoss	-$102.8M	2025-12-31	2026-03-16	10-K	26-000023
14	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$34.0M	2025-12-31	2026-03-16	10-K	26-000023
15	assets	us-gaap:Assets	$621.6M	2024-12-31	2026-03-16	10-K	26-000023
16	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$908.3M	2024-12-31	2026-03-16	10-K	26-000023
17	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$719.0M	2024-12-31	2026-03-16	10-K	26-000023

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18	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$975.8M	2023-12-31	2026-03-16	10-K	26-000023
19	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$774.5M	2023-12-31	2026-03-16	10-K	26-000023
20	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$899.9M	2022-12-31	2025-03-03	10-K	25-000012
21	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$725.0M	2022-12-31	2025-03-03	10-K	25-000012
22	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$770.5M	2021-12-31	2024-03-01	10-K	24-000007
23	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$603.6M	2021-12-31	2024-03-01	10-K	24-000007
24	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$32.5M	2025-12-31	2026-03-16	10-K	26-000023
25	operating income	us-gaap:OperatingIncomeLoss	$12.8M	2023-12-31	2026-03-16	10-K	26-000023
26	interest expense	us-gaap:InterestExpense	-$13.0M	2023-12-31	2024-03-01	10-K	24-000007
27	current assets	us-gaap:AssetsCurrent	$361.9M	2025-12-31	2026-03-16	10-K	26-000023
28	current liabilities	us-gaap:LiabilitiesCurrent	$157.6M	2025-12-31	2026-03-16	10-K	26-000023
29	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$21.9M	2025-12-31	2026-03-16	10-K	26-000023
30	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$47.7M	2024-12-31	2026-03-16	10-K	26-000023
31	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$24.3M	2024-12-31	2026-03-16	10-K	26-000023
32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$4.9M	2023-12-31	2026-03-16	10-K	26-000023
33	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$38.5M	2023-12-31	2026-03-16	10-K	26-000023
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$6.8M	2022-12-31	2025-03-03	10-K	25-000012
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$27.2M	2022-12-31	2023-03-02	10-K	23-000013
36	current assets	us-gaap:AssetsCurrent	$387.5M	2024-12-31	2026-03-16	10-K	26-000023
37	current liabilities	us-gaap:LiabilitiesCurrent	$150.0M	2024-12-31	2026-03-16	10-K	26-000023
38	assets	us-gaap:Assets	$679.9M	2023-12-31	2025-03-03	10-K	25-000012
39	assets	us-gaap:Assets	$652.1M	2022-12-31	2024-03-01	10-K	24-000007
40	shares outstanding	dei:EntityCommonStockSharesOutstanding	28,016,931	2026-03-01	2026-03-16	10-K	26-000023
41	shares outstanding	dei:EntityCommonStockSharesOutstanding	27,695,248	2025-02-26	2025-03-03	10-K	25-000012

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