HireQuest, Inc.

HQI

Nasdaq; other; SIC 7363, Services-Help Supply Services; CIK 0001140102

B

second fifth of 316 graded peers in other

rank 94 of 316; percentile 29.5; sampling error 2.7 points; lower is stronger

A B C D E

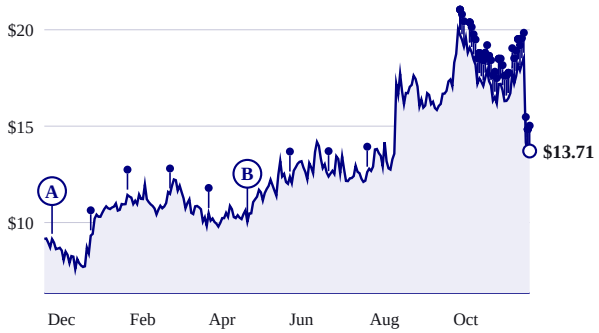
B, the elk



Scoreboard

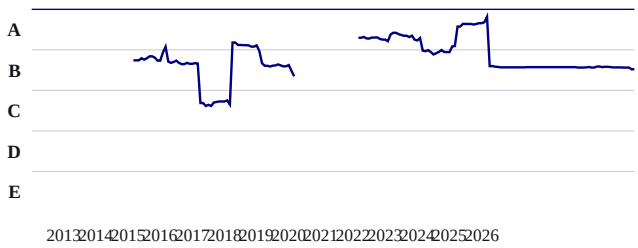
Profitability	C percentile 47.8
Solvency	A percentile 12.1
Growth and financing	D percentile 65.7
Reliability	0.83 AUC filers with $12.5M to $120M assets; 95% interval 0.79 to 0.86; 201 events, 2020 to 2025
Peer failure rate	1.07% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$12.5M to $120M assets total assets $88.2M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: short runway, distress, fortress balance sheet
Inputs computable	7 of 13
Graded from	filings received through Mar 31, 2026 232 days before the rescan; latest periodic filing 10-Q received Nov 16, 2026
Last close	$14.13 2026-11-17; market equity $196.4M; 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 31, 2026

HireQuest, Inc. (collectively with its subsidiaries, the "Company," "we," "us," or "our") is a Delaware corporation originally organized in Washington as Command Staffing, LLC in 2002. In 2005, Temporary Financial Services, Inc., a public company, acquired the assets of Command Staffing, LLC, and the combined entity changed its name to Command Center, Inc. On September 11, 2019, Command Center, Inc. reincorporated in Delaware and changed its name to HireQuest, Inc. following its acquisition of Hire Quest Holdings, LLC ("Hire Quest Holdings," and together with its subsidiary, Hire Quest, LLC, "Legacy HQ"). This acquisition is sometimes referred to as the "Merger.

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 47.8						
Gross profitability	not computable	26.8%				

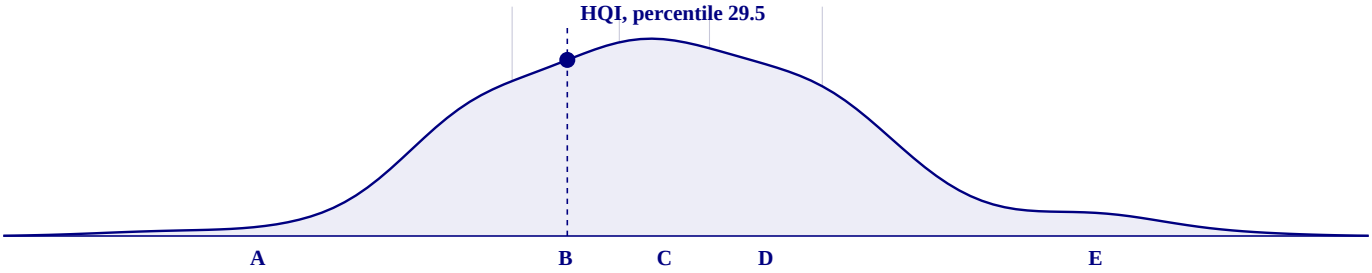
latest aligned inputs end 2021-12-31; latest annual assets end 2025-12-31

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Return on invested capital	not computable	10.0%			
one or more required annual facts are missing					
Accruals ratio	(6.3%)	(5.8%)	47.8	459	2025-12-31
Gross margin stability, five years	not computable	2.1 pts			
five consecutive annual gross margins are required					
Solvency, sleeve percentile 12.1					
Altman Z double-prime	7.69	2.06	7.3	358	2025-12-31
Net debt to EBITDA	not computable	2.36x			
one or more required annual facts are missing					
Interest coverage	20.46x	2.93x	14.3	78	2025-12-31
Current ratio	3.15x	1.32x	14.7	463	2025-12-31
Growth and financing, sleeve percentile 65.7					
Revenue growth, three-year compound	(0.3%)	5.0%	67.6	378	2025-12-31
Free cash flow growth, three-year compound	not computable	8.9%			
four consecutive annual FCF observations are required; found 0					
Reinvestment rate	not computable	13.3%			
one or more required annual facts are missing					
Asset growth, three years	(5.1%)	4.0%	81.8	403	2025-12-31
Net share issuance, one year	0.0%	(0.5%)	47.7	353	2026-03-27

Among 316 peers

other; 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
89	Legacy Housing Corp. (LEGH)	27.9	B	
90	FTI Consulting, Inc. (FCN)	28.3	B	fortress balance sheet
91	Acorn Energy, Inc. (ACFN)	28.6	B	fortress balance sheet
92	Onespaworld Holdings Ltd. (OSW)	28.9	B	
93	Landstar System Inc. (LSTR)	29.2	B	late filer, fortress balance sheet
94	HireQuest, Inc. (HQI)	29.5	B	
95	Bgsf, Inc. (BGSF)	29.8	B	late filer
96	Planet Fitness, Inc. (PLNT)	30.2	B	
97	National CineMedia, Inc. (NCMI)	30.5	B	fortress balance sheet
98	C. H. Robinson Worldwide, Inc. (CHRW)	30.8	B	
99	Vulcan Materials Co. (VMC)	31.1	B	

What the price implies

at the 2026-11-17 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	128.9%	0.06%	98
Distance from 52-week high	(31.6%)	(24.7%)	39
EBIT to enterprise value	not computable	4.5%	
Free cash flow yield	not computable	4.2%	

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Book value to price	0.37	0.37	50
Sales to price	0.16	0.69	10
Composite equity issuance, five years	(7.2%)	(9.4%)	57
Relative strength against the sector, log excess return	0.71	(0.12)	98
Twelve-month failure probability, CHS model	not computable	0.03%	

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score None 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	fail
Current ratio improved	pass
No new shares issued	pass
Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	n/a
Operating cash flow, four quarters	n/a
Months of runway	not finite
Days since last periodic filing	2 (10-Q received Nov 16, 2026)
Median daily dollar volume, 63 sessions	$411,302

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	$22.6M	2021-12-31	2022-03-15	10-K	22-006329
2	assets	us-gaap:Assets	$77.4M	2021-12-31	2023-03-21	10-K	23-007413
3	net income	us-gaap:NetIncomeLoss	$6.3M	2025-12-31	2026-03-31	10-K	26-010435
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$12.0M	2025-12-31	2026-03-31	10-K	26-010435
5	assets	us-gaap:Assets	$88.2M	2025-12-31	2026-03-31	10-K	26-010435
6	assets	us-gaap:Assets	$94.0M	2024-12-31	2026-03-31	10-K	26-010435
7	current assets	us-gaap:AssetsCurrent	$48.3M	2025-12-31	2026-03-31	10-K	26-010435
8	current liabilities	us-gaap:LiabilitiesCurrent	$15.3M	2025-12-31	2026-03-31	10-K	26-010435
9	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$31.2M	2025-12-31	2026-03-31	10-K	26-010435
10	operating income	us-gaap:OperatingIncomeLoss	$6.3M	2025-12-31	2026-03-31	10-K	26-010435
11	book equity	us-gaap:StockholdersEquity	$68.3M	2025-12-31	2026-03-31	10-K	26-010435
12	liabilities	us-gaap:Liabilities	$19.9M	2025-12-31	2026-03-31	10-K	26-010435
13	interest expense	us-gaap:InterestExpense	$307,000	2025-12-31	2026-03-31	10-K	26-010435
14	revenue	us-gaap:Revenues	$30.6M	2025-12-31	2026-03-31	10-K	26-010435
15	revenue	us-gaap:Revenues	$34.6M	2024-12-31	2026-03-31	10-K	26-010435
16	revenue	us-gaap:Revenues	$37.9M	2023-12-31	2025-03-27	10-K	25-009646
17	revenue	us-gaap:Revenues	$31.0M	2022-12-31	2024-03-21	10-K	24-008879
18	assets	us-gaap:Assets	$103.8M	2023-12-31	2025-03-27	10-K	25-009646
19	assets	us-gaap:Assets	$103.3M	2022-12-31	2024-03-21	10-K	24-008879
20	shares outstanding	dei:EntityCommonStockSharesOutstanding	14,000,000	2026-03-27	2026-03-31	10-K	26-010435
21	shares outstanding	dei:EntityCommonStockSharesOutstanding	14,000,000	2025-03-26	2025-03-27	10-K	25-009646

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