Korn Ferry

KFY

NYSE; other; SIC 7361, Services-Employment Agencies; CIK 0000056679

C

middle fifth of 316 graded peers in other

rank 137 of 316; percentile 43.2; sampling error 2.7 points; lower is stronger

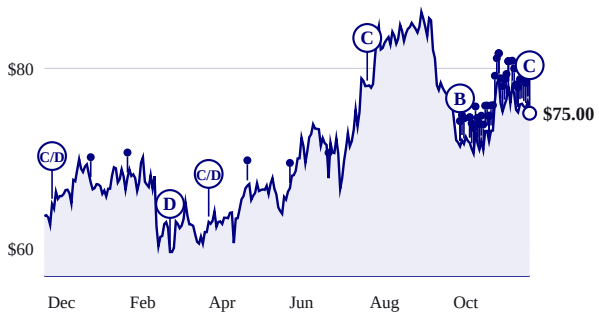
A B C D E

C, the tortoise



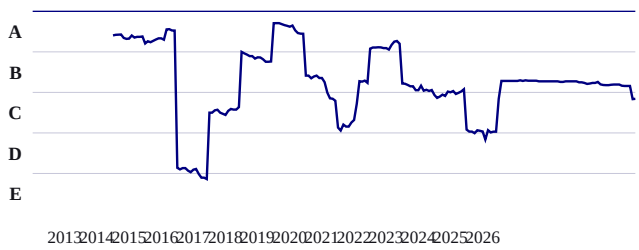
Scoreboard	
Profitability	D percentile 68.3
Solvency	B percentile 23.7
Growth and financing	C percentile 47.0
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $4.1B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered; fortress balance sheet
Inputs computable	8 of 13
Graded from	filings received through Jun 26, 2026 145 days before the rescan; latest periodic filing 10-Q received Sep 9, 2026
Last close	$75.14 2026-11-17; market equity $4.1B; 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 Jun 26, 2026

Korn Ferry (referred to herein as the "Company" or in the first-person notations "we," "our" and "us") is a global consulting firm that powers individual and business performance. The impact we create spans entire organizations, but it always starts with people. In every market and every technology shift, strategy sets direction, but people make it happen. They lead, adapt, innovate and execute the work that moves organizations forward. For more than 50 years, Korn Ferry has studied how people and organizations perform.

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 68.3						
Gross profitability	not computable	26.8%				
one or more required annual facts are missing						
Return on invested capital	not computable	10.0%				
latest aligned inputs end 2015-04-30; latest annual assets end 2026-04-30						

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Accruals ratio	(3.5%)	(5.8%)		68.3	459	2026-04-30
Gross margin stability, five years	not computable	2.1 pts				
five annual gross margins are required; found 0						
Solvency, sleeve percentile 23.7						
Altman Z double-prime	4.52	2.06		18.5	358	2026-04-30
Net debt to EBITDA	not computable	2.36x				
latest aligned inputs end 2015-04-30; latest annual assets end 2026-04-30						
Interest coverage	not computable	2.93x				
latest aligned inputs end 2014-04-30; latest annual assets end 2026-04-30						
Current ratio	1.94x	1.32x		29.0	463	2026-04-30
Growth and financing, sleeve percentile 47.0						
Revenue growth, three-year compound	0.9%	5.0%		64.5	378	2026-04-30
Free cash flow growth, three-year compound	5.8%	8.9%		54.2	213	2026-04-30
Reinvestment rate	44.5%	13.3%		35.5	187	2026-04-30
Asset growth, three years	4.4%	4.0%		47.8	403	2026-04-30
Net share issuance, one year	(2.0%)	(0.5%)		33.0	353	2026-06-18

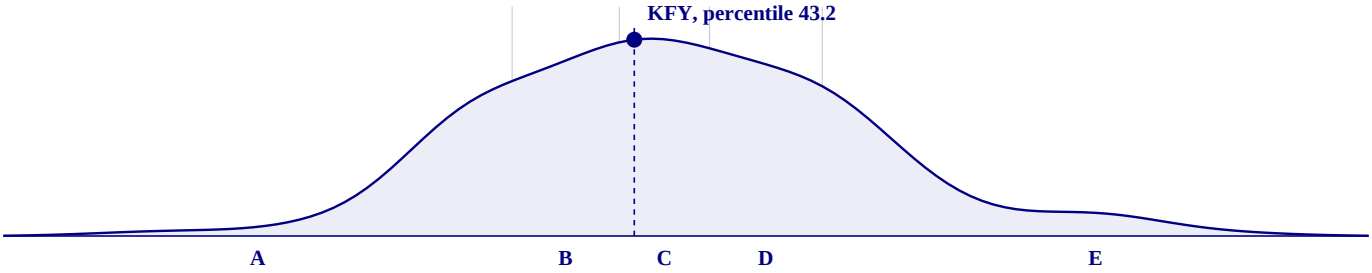
Warnings

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

Check	Measured
Fortress balance sheet	cash minus debt is 380,838,000 USD; Altman Z is not used

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
132	Graham Holdings Co. (GHC)	41.6	B/C	
133	Martin Marietta Materials Inc. (MLM)	41.9	B/C	
134	Bristow Group Inc. (VTOL)	42.2	B/C	
135	Huron Consulting Group Inc. (HURN)	42.5	B/C	
136	NPK International Inc. (NPKI)	42.9	C	
137	Korn Ferry (KFY)	43.2	C	fortress balance sheet
138	V2X, Inc. (VVX)	43.5	C	
139	Werner Enterprises Inc. (WERN)	43.8	C	
140	TSS, Inc. (TSSI)	44.1	C	late filer, fortress balance sheet
141	EVgo Inc. (EVGO)	44.4	C	
142	Walt Disney Co. (DIS)	44.8	C	

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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	14.1%	0.06%	64
Distance from 52-week high	(13.1%)	(24.7%)	71
EBIT to enterprise value	11.4%	4.5%	92
Free cash flow yield	7.9%	4.2%	74
Book value to price	0.49	0.37	62
Sales to price	0.72	0.69	51
Composite equity issuance, five years	(9.4%)	(9.4%)	50
Relative strength against the sector, log excess return	0.01	(0.12)	64
Twelve-month failure probability, CHS model	0.02%	0.03%	17

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score None of 9, period end 2026-04-30	
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	pass
No new shares issued	pass
Gross margin improved	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$800.9M
Operating cash flow, four quarters	$403.9M
Months of runway	not finite
Days since last periodic filing	70 (10-Q received Sep 9, 2026)
Median daily dollar volume, 63 sessions	$32.5M

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	operating income	us-gaap:OperatingIncomeLoss	$114.0M	2015-04-30	2017-06-28	10-K	17-216289
2	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$119.7M	2015-04-30	2017-06-28	10-K	17-216289
3	income tax	us-gaap:IncomeTaxExpenseBenefit	$33.5M	2015-04-30	2017-06-28	10-K	17-216289
4	total debt	us-gaap:LongTermDebt	$0	2015-04-30	2015-06-26	10-K	15-237143
5	book equity	us-gaap:StockholdersEquity	$815.2M	2015-04-30	2016-06-28	10-K	16-634657
6	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$380.8M	2015-04-30	2018-06-28	10-K	18-207569
7	total debt	us-gaap:LongTermDebt	$0	2014-04-30	2015-06-26	10-K	15-237143
8	book equity	us-gaap:StockholdersEquity	$755.5M	2014-04-30	2015-06-26	10-K	15-237143
9	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$333.7M	2014-04-30	2017-06-28	10-K	17-216289
10	net income	us-gaap:NetIncomeLoss	$277.4M	2026-04-30	2026-06-26	10-K	26-000021
11	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$414.2M	2026-04-30	2026-06-26	10-K	26-000021
12	assets	us-gaap:Assets	$4.1B	2026-04-30	2026-06-26	10-K	26-000021
13	assets	us-gaap:Assets	$3.9B	2025-04-30	2026-06-26	10-K	26-000021
14	current assets	us-gaap:AssetsCurrent	$1.9B	2026-04-30	2026-06-26	10-K	26-000021
15	current liabilities	us-gaap:LiabilitiesCurrent	$982.0M	2026-04-30	2026-06-26	10-K	26-000021
16	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$1.8B	2026-04-30	2026-06-26	10-K	26-000021
17	operating income	us-gaap:OperatingIncomeLoss	$374.7M	2026-04-30	2026-06-26	10-K	26-000021

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18	book equity	us-gaap:StockholdersEquity	$2.0B	2026-04-30	2026-06-26	10-K	26-000021
19	liabilities	us-gaap:Liabilities	$2.1B	2026-04-30	2026-06-26	10-K	26-000021
20	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$27.6M	2015-04-30	2017-06-28	10-K	17-216289
21	operating income	us-gaap:OperatingIncomeLoss	$91.6M	2014-04-30	2016-06-28	10-K	16-634657
22	interest expense	us-gaap:InterestExpense	$2.4M	2014-04-30	2014-06-27	10-K	14-253292
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$2.9B	2026-04-30	2026-06-26	10-K	26-000021
24	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$2.8B	2025-04-30	2026-06-26	10-K	26-000021
25	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$2.8B	2024-04-30	2026-06-26	10-K	26-000021
26	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$2.9B	2023-04-30	2025-06-27	10-K	25-033260
27	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$89.9M	2026-04-30	2026-06-26	10-K	26-000021
28	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$364.4M	2025-04-30	2026-06-26	10-K	26-000021
29	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$62.5M	2025-04-30	2026-06-26	10-K	26-000021
30	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$284.0M	2024-04-30	2026-06-26	10-K	26-000021
31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$55.1M	2024-04-30	2026-06-26	10-K	26-000021
32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$343.9M	2023-04-30	2025-06-27	10-K	25-033260
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$70.4M	2023-04-30	2025-06-27	10-K	25-033260
34	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$98.8M	2026-04-30	2026-06-26	10-K	26-000021
35	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$388.4M	2026-04-30	2026-06-26	10-K	26-000021
36	income tax	us-gaap:IncomeTaxExpenseBenefit	$107.6M	2026-04-30	2026-06-26	10-K	26-000021
37	current assets	us-gaap:AssetsCurrent	$1.8B	2025-04-30	2026-06-26	10-K	26-000021
38	current liabilities	us-gaap:LiabilitiesCurrent	$955.6M	2025-04-30	2026-06-26	10-K	26-000021
39	assets	us-gaap:Assets	$3.7B	2024-04-30	2025-06-27	10-K	25-033260
40	assets	us-gaap:Assets	$3.6B	2023-04-30	2024-06-28	10-K	24-030470
41	shares outstanding	dei:EntityCommonStockSharesOutstanding	50,857,000	2026-06-18	2026-06-26	10-K	26-000021
42	shares outstanding	dei:EntityCommonStockSharesOutstanding	51,921,000	2025-06-20	2025-06-27	10-K	25-033260

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