LGL Group Inc.

LGL

NYSE; business equipment; SIC 3679, Electronic Components, NEC; CIK 0000061004

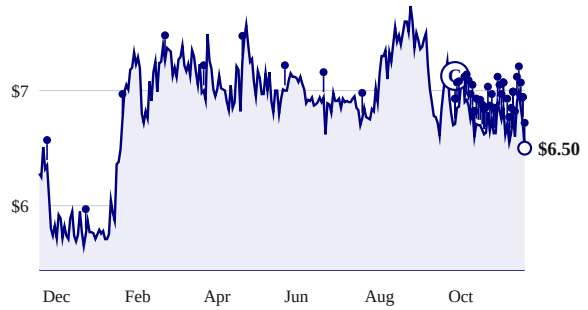
None

No letter

6 of 13 inputs computable; 7 are required, with a score in every sleeve

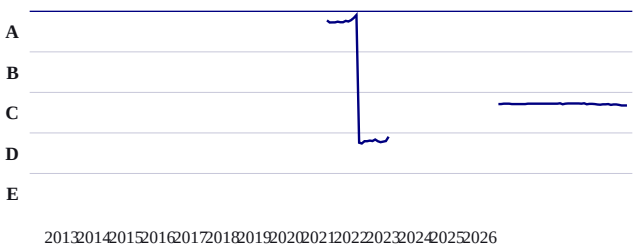
Scoreboard	
Reliability	0.83 AUC filers with $12.5M to $120M assets; 95% interval 0.79 to 0.86; 201 events, 2020 to 2025
Peer failure rate	1.07% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$12.5M to $120M assets total assets $46.8M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	thin data; fortress balance sheet
Inputs computable	6 of 13
Graded from	filings received through Mar 30, 2026 233 days before the rescan; latest periodic filing 10-Q received Nov 12, 2026
Last close	$6.61 2026-11-05; market equity $83.4M; 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 30, 2026

For the purposes of this discussion, the terms "LGL," "LGL Group," the "Company," "we," "our," and "us" refer collectively to The LGL Group, Inc. and its subsidiaries. Unless otherwise stated, all dollar amounts are in thousands. The LGL Group, Inc. is a holding company engaged in services, merchant investment and manufacturing business activities. Since 1985, the Company has acquired 32 businesses, sold 11, and spun off 3, culminating with the spin-off of M-tron Industries, Inc. in October 2022. The Company was incorporated in 1928 under the laws of the State of Indiana, and in 2007, the Company was reincorporated under the laws of the State of Delaware as The LGL Group, Inc.

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 88.3						
Gross profitability	not computable	29.2%				
one or more required annual facts are missing						

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Return on invested capital	not computable	11.2%				
prior invested-capital observation is 2557 days earlier						
Accruals ratio	1.4%	(7.4%)		88.3	565	2025-12-31
Gross margin stability, five years	not computable	2.3 pts				
five annual gross margins are required; found 0						
Solvency, sleeve percentile 0.7						
Altman Z double-prime	43.70	2.21		0.6	515	2025-12-31
Net debt to EBITDA	not computable	1.11x				
latest aligned inputs end 2020-12-31; latest annual assets end 2025-12-31						
Interest coverage	not computable	4.90x				
interest expense must exceed $100,000						
Current ratio	50.63x	1.98x		0.8	599	2025-12-31
Growth and financing, sleeve percentile 53.7						
Revenue growth, three-year compound	14.0%	6.5%		29.6	501	2025-12-31
Free cash flow growth, three-year compound	not computable	17.5%				
latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31						
Reinvestment rate	not computable	15.1%				
NOPAT must exceed $100,000						
Asset growth, three years	5.5%	5.0%		46.4	518	2025-12-31
Net share issuance, one year	21.5%	0.5%		85.1	404	2026-03-16

Warnings

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

Check	Measured
Thin data	6 of 13 grade factors are computable; minimum is 7
Fortress balance sheet	cash minus debt is 18,038,000 USD; Altman Z is not used

What the price implies

at the 2026-11-05 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	13.4%	(2.2%)	61
Distance from 52-week high	(16.0%)	(37.6%)	77
EBIT to enterprise value	not computable	1.8%	
Free cash flow yield	0.5%	3.0%	26
Book value to price	1.05	0.27	86
Sales to price	0.03	0.32	2
Composite equity issuance, five years	7.4%	4.3%	55
Relative strength against the sector, log excess return	(0.14)	(0.29)	61
Twelve-month failure probability, CHS model	0.00%	0.05%	0

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	fail
Long-term leverage fell	fail
Current ratio improved	pass
No new shares issued	fail
Gross margin improved	fail

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Asset turnover improved	pass

Cash, filings, liquidity

Cash and equivalents	$86.9M
Operating cash flow, four quarters	-$248,000
Months of runway	4206.3
Days since last periodic filing	6 (10-Q received Nov 12, 2026)
Median daily dollar volume, 63 sessions	$65,683

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	$1.4M	2020-12-31	2022-03-28	10-K	22-011892
2	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$1.3M	2020-12-31	2022-03-28	10-K	22-011892
3	income tax	us-gaap:IncomeTaxExpenseBenefit	$336,000	2020-12-31	2022-03-28	10-K	22-011892
4	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$293,000	2020-12-31	2021-03-29	10-K	21-016107
5	book equity	us-gaap:StockholdersEquity	$39.8M	2020-12-31	2023-04-17	10-K	23-005807
6	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$18.3M	2020-12-31	2022-03-28	10-K	22-011892
7	total debt	us-gaap:LongTermDebt	$0	2013-12-31	2014-03-31	10-K	14-000017
8	book equity	us-gaap:StockholdersEquity	$16.8M	2013-12-31	2016-03-29	10-K	16-000057
9	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$7.2M	2013-12-31	2016-03-29	10-K	16-000057
10	net income	us-gaap:NetIncomeLoss	$688,000	2025-12-31	2026-03-30	10-K	26-010362
11	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$70,000	2025-12-31	2026-03-30	10-K	26-010362
12	assets	us-gaap:Assets	$46.8M	2025-12-31	2026-03-30	10-K	26-010362
13	assets	us-gaap:Assets	$43.1M	2024-12-31	2026-03-30	10-K	26-010362
14	current assets	us-gaap:AssetsCurrent	$46.3M	2025-12-31	2026-03-30	10-K	26-010362
15	current liabilities	us-gaap:LiabilitiesCurrent	$915,000	2025-12-31	2026-03-30	10-K	26-010362
16	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$5.9M	2025-12-31	2026-03-30	10-K	26-010362
17	operating income	us-gaap:OperatingIncomeLoss	$249,000	2025-12-31	2026-03-30	10-K	26-010362
18	book equity	us-gaap:StockholdersEquity	$43.5M	2025-12-31	2026-03-30	10-K	26-010362
19	liabilities	us-gaap:Liabilities	$1.2M	2025-12-31	2026-03-30	10-K	26-010362
20	depreciation amortization	us-gaap:Depreciation	$453,000	2020-12-31	2022-03-28	10-K	22-011892
21	operating income	us-gaap:OperatingIncomeLoss	$276,000	2017-12-31	2019-03-21	10-K	19-008815
22	interest expense	us-gaap:InterestExpense	$11,000	2017-12-31	2018-03-22	10-K	18-006502
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$2.5M	2025-12-31	2026-03-30	10-K	26-010362
24	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$2.2M	2024-12-31	2026-03-30	10-K	26-010362
25	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.7M	2023-12-31	2025-03-31	10-K	25-010246
26	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.7M	2022-12-31	2024-04-01	10-K	24-010393
27	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$385,000	2023-12-31	2025-03-31	10-K	25-010246
28	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$0	2023-12-31	2024-04-01	10-K	24-010393
29	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$817,000	2022-12-31	2024-04-01	10-K	24-010393
30	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$662,000	2022-12-31	2024-04-01	10-K	24-010393
31	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$1.4M	2021-12-31	2023-04-17	10-K	23-005807
32	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$1.1M	2021-12-31	2023-04-17	10-K	23-005807
33	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$3.2M	2020-12-31	2022-03-28	10-K	22-011892
34	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$407,000	2020-12-31	2022-03-28	10-K	22-011892
35	depreciation amortization	us-gaap:Depreciation	$496,000	2022-12-31	2024-04-01	10-K	24-010393
36	operating income	us-gaap:OperatingIncomeLoss	-$2.0M	2022-12-31	2023-04-17	10-K	23-005807
37	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$6.4M	2022-12-31	2023-04-17	10-K	23-005807
38	income tax	us-gaap:IncomeTaxExpenseBenefit	-$1.5M	2022-12-31	2024-04-01	10-K	24-010393
39	current assets	us-gaap:AssetsCurrent	$39.3M	2022-12-31	2024-04-01	10-K	24-010393
40	current liabilities	us-gaap:LiabilitiesCurrent	$587,000	2022-12-31	2024-04-01	10-K	24-010393
41	current assets	us-gaap:AssetsCurrent	$55.8M	2021-12-31	2023-04-17	10-K	23-005807
42	current liabilities	us-gaap:LiabilitiesCurrent	$4.4M	2021-12-31	2023-04-17	10-K	23-005807
43	assets	us-gaap:Assets	$41.9M	2023-12-31	2025-03-31	10-K	25-010246
44	assets	us-gaap:Assets	$39.8M	2022-12-31	2024-04-01	10-K	24-010393
45	shares outstanding	dei:EntityCommonStockSharesOutstanding	6,528,033	2026-03-16	2026-03-30	10-K	26-010362

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46	shares outstanding	dei:EntityCommonStockSharesOutstanding	5,373,055	2025-03-14	2025-03-31	10-K	25-010246	