Loar Holdings Inc.

LOAR

NYSE; manufacturing; SIC 3728, Aircraft Parts & Auxiliary Equipment, NEC; CIK 0002000178

D

fourth fifth of 245 graded peers in manufacturing

rank 179 of 245; percentile 73.0; sampling error 3.0 points; lower is stronger

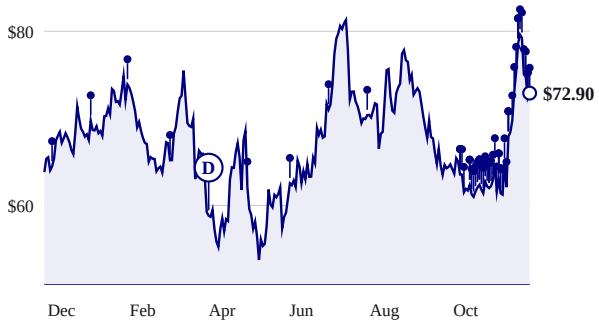
A B C D E

D, the sloth



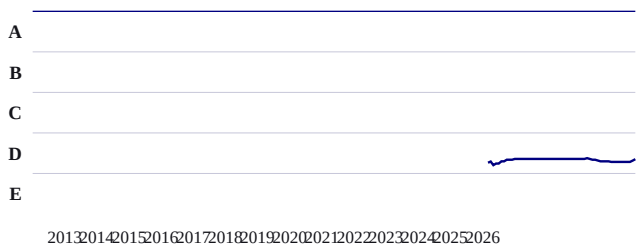
Scoreboard	
Profitability	D percentile 71.1
Solvency	C percentile 53.8
Growth and financing	C percentile 53.3
Reliability	0.91 AUC filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025
Peer failure rate	1.01% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$591M to $2.67B assets total assets $2.0B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress
Inputs computable	8 of 13
Graded from	filings received through Mar 2, 2026 261 days before the rescan; latest periodic filing 10-Q received Nov 5, 2026
Last close	$73.07 2026-11-17; market equity $6.8B; 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 2, 2026

We specialize in the design, manufacture, and sale of niche aerospace and defense components that are essential for today's aircraft and aerospace and defense systems. Our focus on mission-critical, highly engineered solutions with high-intellectual property content resulted in approximately 89% of our 2025 net sales being derived from proprietary products where we believe we hold market-leading positions. Furthermore, our products have significant aftermarket exposure, which has historically generated predictable and recurring revenue. We estimate that approximately 55% of our 2025 net sales were derived from aftermarket products.

The thirteen inputs

lower percentile is stronger; sleeves and inputs within a sleeve carry equal weight

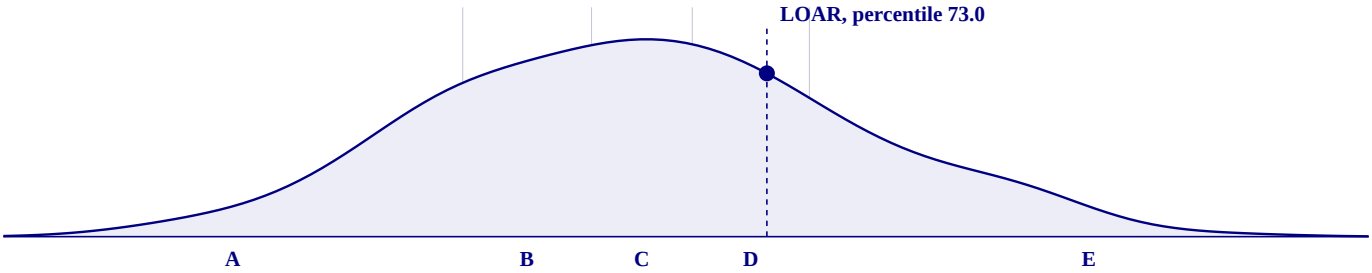
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 71.1						
Gross profitability	12.9%	22.2%		79.2	266	2025-12-31
Return on invested capital	6.1%	9.9%		70.1	98	2025-12-31
Accruals ratio	(2.3%)	(3.7%)		63.9	286	2025-12-31

Not investment advice. Informational and educational only. Data from SEC EDGAR, may contain errors, is not warranted. The grade ranks reported financial condition and is not a return forecast.

Gross margin stability, five years	not computable	2.1 pts				
five annual gross margins are required; found 2						
Solvency, sleeve percentile 53.8						
Altman Z double-prime	2.64	3.73		55.7	222	2025-12-31
Net debt to EBITDA	5.34x	1.75x		92.3	118	2025-12-31
Interest coverage	4.14x	5.13x		55.2	59	2025-12-31
Current ratio	4.70x	2.26x		12.0	301	2025-12-31
Growth and financing, sleeve percentile 53.3						
Revenue growth, three-year compound	not computable	2.2%				
four annual observations are required; found 2						
Free cash flow growth, three-year compound	not computable	13.5%				
four consecutive annual FCF observations are required; found 0						
Reinvestment rate	not computable	25.7%				
one or more required annual facts are missing						
Asset growth, three years	not computable	4.2%				
four annual observations are required; found 2						
Net share issuance, one year	0.07%	0.0%		53.3	241	2026-02-16

Among 245 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
174	Eaton Corp. plc (ETN)	70.9	D	
175	Westinghouse AIR Brake Technologies Corp. (WAB)	71.3	D	
176	JBT Marel Corp. (JBTM)	71.7	D	
177	Nike, Inc. (NKE)	72.1	D	
178	Trimas Corp. (TRS)	72.5	D	late filer
179	Loar Holdings Inc. (LOAR)	73.0	D	
180	Esab Corp. (ESAB)	73.4	D	
181	Columbus Mckinnon Corp. (CMCO)	73.8	D	
182	Griffon Corp. (GFF)	74.2	D	
183	StandardAero, Inc. (SARO)	74.6	D	
184	Carrier Global Corp. (CARR)	75.0	D	

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	(22.3%)	9.9%	20
Distance from 52-week high	(10.3%)	(29.0%)	84
EBIT to enterprise value	1.4%	4.3%	25
Free cash flow yield	not computable	3.6%	
Book value to price	0.18	0.37	19
Sales to price	0.07	0.57	3

Not investment advice. Informational and educational only. Data from SEC EDGAR, may contain errors, is not warranted. The grade ranks reported financial condition and is not a return forecast.

Composite equity issuance, five years	not computable	(9.7%)	
Relative strength against the sector, log excess return	(0.34)	0.01	20
Twelve-month failure probability, CHS model	not computable	0.04%	

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	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	pass
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$159.3M
Operating cash flow, four quarters	$136.6M
Months of runway	not finite
Days since last periodic filing	13 (10-Q received Nov 5, 2026)
Median daily dollar volume, 63 sessions	$46.9M

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	$261.3M	2025-12-31	2026-03-02	10-K	26-000003
2	assets	us-gaap:Assets	$2.0B	2025-12-31	2026-03-02	10-K	26-000003
3	operating income	us-gaap:OperatingIncomeLoss	$106.2M	2025-12-31	2026-03-02	10-K	26-000003
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$80.6M	2025-12-31	2026-03-02	10-K	26-000003
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$8.4M	2025-12-31	2026-03-02	10-K	26-000003
6	total debt	us-gaap:LongTermDebt	$715.7M	2025-12-31	2026-03-02	10-K	26-000003
7	book equity	us-gaap:StockholdersEquity	$1.2B	2025-12-31	2026-03-02	10-K	26-000003
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$84.8M	2025-12-31	2026-03-02	10-K	26-000003
9	total debt	us-gaap:LongTermDebt	$277.3M	2024-12-31	2026-03-02	10-K	26-000003
10	book equity	us-gaap:StockholdersEquity	$1.1B	2024-12-31	2026-03-02	10-K	26-000003
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$54.1M	2024-12-31	2026-03-02	10-K	26-000003
12	net income	us-gaap:NetIncomeLoss	$72.1M	2025-12-31	2026-03-02	10-K	26-000003
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$112.3M	2025-12-31	2026-03-02	10-K	26-000003
14	assets	us-gaap:Assets	$1.5B	2024-12-31	2026-03-02	10-K	26-000003
15	current assets	us-gaap:AssetsCurrent	$298.5M	2025-12-31	2026-03-02	10-K	26-000003
16	current liabilities	us-gaap:LiabilitiesCurrent	$63.5M	2025-12-31	2026-03-02	10-K	26-000003
17	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$51.6M	2025-12-31	2026-03-02	10-K	26-000003
18	liabilities	us-gaap:Liabilities	$855.1M	2025-12-31	2026-03-02	10-K	26-000003
19	depreciation amortization	us-gaap:Depreciation	$11.9M	2025-12-31	2026-03-02	10-K	26-000003
20	interest expense	us-gaap:InterestExpense	$25.7M	2025-12-31	2026-03-02	10-K	26-000003
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$496.3M	2025-12-31	2026-03-02	10-K	26-000003
22	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$402.8M	2024-12-31	2026-03-02	10-K	26-000003
23	shares outstanding	dei:EntityCommonStockSharesOutstanding	93,622,471	2026-02-16	2026-03-02	10-K	26-000003
24	shares outstanding	dei:EntityCommonStockSharesOutstanding	93,556,071	2025-03-28	2025-03-31	10-K	25-047242

Not investment advice. Informational and educational only. Data from SEC EDGAR, may contain errors, is not warranted. The grade ranks reported financial condition and is not a return forecast.