Magnachip Semiconductor Corp. MX

NYSE; business equipment; SIC 3674, Semiconductors & Related Devices; CIK 0001325702

D

fourth fifth of 468 graded peers in business equipment

rank 333 of 468; percentile 71.1; sampling error 2.3 points; lower is stronger

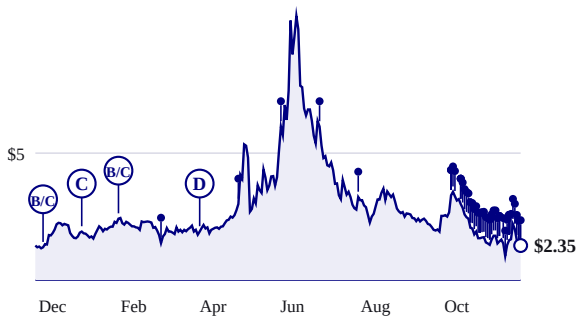
A B C D E

D, the sloth



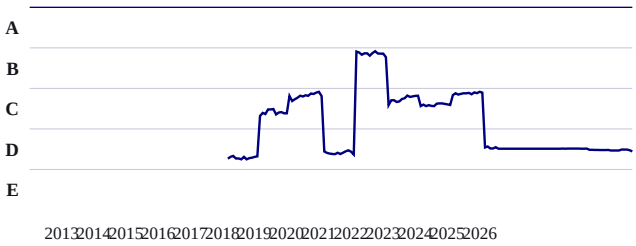
Scoreboard	
Profitability	D/E percentile 82.0
Solvency	A/B percentile 19.5
Growth and financing	D percentile 68.5
Reliability	0.87 AUC filers with $120M to $591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025
Peer failure rate	1.03% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$120M to $591M assets total assets $351.5M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered; fortress balance sheet not computable: distress
Inputs computable	8 of 13
Graded from	filings received through Mar 16, 2026 247 days before the rescan; latest periodic filing 10-Q received Nov 5, 2026
Last close	$2.35 2026-11-17; market equity $89.2M; 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

We are a designer and manufacturer of analog and mixed-signal power semiconductor platform solutions for various applications, including industrial, automotive, communication, consumer and computing. We have a proven record with approximately 45 years of operating history, a portfolio of more than 950 registered patents and pending applications and extensive engineering and manufacturing process expertise. We develop and manufacture Power discrete ("Power Analog Solutions") products and Power integrated circuit ("IC") 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 82.0						
Gross profitability	8.9%	29.2%		85.7	511	2025-12-31
Return on invested capital	not computable	11.2%				

a prior annual debt, equity, and cash observation is required

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Accruals ratio	(1.5%)	(7.4%)	82.6	565	2025-12-31
Gross margin stability, five years	5.8 pts	2.3 pts	77.7	405	2025-12-31
Solvency, sleeve percentile 19.5					
Altman Z double-prime	6.32	2.21	17.5	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			
latest aligned inputs end 2012-12-31; latest annual assets end 2025-12-31					
Current ratio	4.07x	1.98x	21.6	599	2025-12-31
Growth and financing, sleeve percentile 68.5					
Revenue growth, three-year compound	(19.1%)	6.5%	93.4	501	2025-12-31
Free cash flow growth, three-year compound	not computable	17.5%			
current FCF must be positive and base FCF must exceed $100,000					
Reinvestment rate	not computable	15.1%			
NOPAT must exceed $100,000					
Asset growth, three years	(12.0%)	5.0%	86.3	518	2025-12-31
Net share issuance, one year	(1.2%)	0.5%	25.8	404	2026-03-13

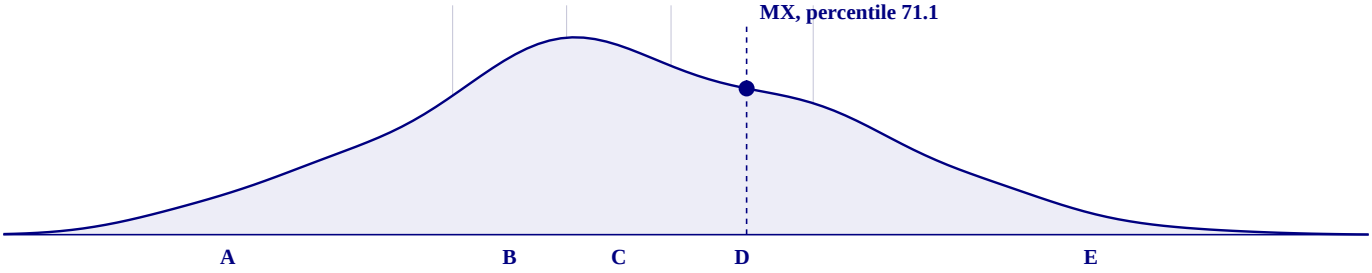
Warnings

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

Check	Measured
Fortress balance sheet	cash minus debt is 196,461,000 USD; Altman Z is not used

Among 468 peers

business equipment; 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
328	Coherent Corp. (COHR)	70.0	D	dilution
329	Kaltura Inc. (KLTR)	70.2	D	
330	Science Applications International Corp. (SAIC)	70.4	D	
331	i3 Verticals, Inc. (IIIV)	70.7	D	fortress balance sheet
332	Cars.com Inc. (CARS)	70.9	D	
333	Magnachip Semiconductor Corp. (MX)	71.1	D	fortress balance sheet
334	Bruker Corp. (BRKR)	71.3	D	
335	Palo Alto Networks Inc. (PANW)	71.5	D	
336	Blackbaud Inc. (BLKB)	71.7	D	
337	DigitalOcean Holdings, Inc. (DOCN)	71.9	D	
338	Q2 Holdings, Inc. (QTWO)	72.2	D	

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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	21.3%	(2.2%)	66
Distance from 52-week high	(73.7%)	(37.6%)	13
EBIT to enterprise value	(72.3%)	1.8%	7
Free cash flow yield	(60.6%)	3.0%	7
Book value to price	2.74	0.27	95
Sales to price	2.00	0.32	85
Composite equity issuance, five years	(19.3%)	4.3%	13
Relative strength against the sector, log excess return	(0.08)	(0.29)	66
Twelve-month failure probability, CHS model	not computable	0.05%	

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 4 of 9, period end 2025-12-31	
Return on assets above zero	fail
Operating cash flow above zero	fail
Return on assets improved	pass
Operating cash flow exceeds net income	pass
Long-term leverage fell	fail
Current ratio improved	fail
No new shares issued	pass
Gross margin improved	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$86.9M
Operating cash flow, four quarters	-$15.7M
Months of runway	66.3
Days since last periodic filing	13 (10-Q received Nov 5, 2026)
Median daily dollar volume, 63 sessions	$1.8M

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	$31.4M	2025-12-31	2026-03-16	10-K	26-108435
2	assets	us-gaap:Assets	$351.5M	2025-12-31	2026-03-16	10-K	26-108435
3	operating income	us-gaap:OperatingIncomeLoss	$27.0M	2020-12-31	2023-02-22	10-K	23-044850
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$10.8M	2020-12-31	2023-02-22	10-K	23-044850
5	income tax	us-gaap:IncomeTaxExpenseBenefit	-$46.2M	2020-12-31	2023-02-22	10-K	23-044850
6	total debt	us-gaap:LongTermDebt	$83.5M	2020-12-31	2021-03-09	10-K	21-073817
7	book equity	us-gaap:StockholdersEquity	$345.6M	2020-12-31	2024-03-08	10-K	24-063674
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$279.9M	2020-12-31	2022-02-23	10-K	22-050017
9	net income	us-gaap:NetIncomeLoss	-$29.7M	2025-12-31	2026-03-16	10-K	26-108435
10	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$24.2M	2025-12-31	2026-03-16	10-K	26-108435
11	assets	us-gaap:Assets	$379.3M	2024-12-31	2026-03-16	10-K	26-108435
12	revenue	us-gaap:Revenues	$178.9M	2025-12-31	2026-03-16	10-K	26-108435
13	gross profit	us-gaap:GrossProfit	$38.7M	2024-12-31	2026-03-16	10-K	26-108435
14	revenue	us-gaap:Revenues	$196.4M	2024-12-31	2026-03-16	10-K	26-108435
15	gross profit	us-gaap:GrossProfit	$51.6M	2023-12-31	2025-03-14	10-K	25-054851
16	revenue	us-gaap:Revenues	$230.1M	2023-12-31	2025-03-14	10-K	25-054851
17	gross profit	us-gaap:GrossProfit	$101.3M	2022-12-31	2024-03-08	10-K	24-063674

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18	revenue	us-gaap:Revenues	$337.7M	2022-12-31	2024-03-08	10-K	24-063674
19	gross profit	us-gaap:GrossProfit	$153.5M	2021-12-31	2024-03-08	10-K	24-063674
20	revenue	us-gaap:Revenues	$474.2M	2021-12-31	2024-03-08	10-K	24-063674
21	current assets	us-gaap:AssetsCurrent	$176.9M	2025-12-31	2026-03-16	10-K	26-108435
22	current liabilities	us-gaap:LiabilitiesCurrent	$43.4M	2025-12-31	2026-03-16	10-K	26-108435
23	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$214.9M	2025-12-31	2026-03-16	10-K	26-108435
24	operating income	us-gaap:OperatingIncomeLoss	-$35.9M	2025-12-31	2026-03-16	10-K	26-108435
25	book equity	us-gaap:StockholdersEquity	$248.2M	2025-12-31	2026-03-16	10-K	26-108435
26	liabilities	us-gaap:Liabilities	$103.3M	2025-12-31	2026-03-16	10-K	26-108435
27	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$16.5M	2020-12-31	2023-02-22	10-K	23-044850
28	operating income	us-gaap:OperatingIncomeLoss	$84.3M	2012-12-31	2015-05-28	10-K	15-204040
29	interest expense	us-gaap:InterestExpense	$22.6M	2012-12-31	2013-02-22	10-K	13-070260
30	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$30.0M	2025-12-31	2026-03-16	10-K	26-108435
31	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$6.1M	2024-12-31	2026-03-16	10-K	26-108435
32	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$11.6M	2024-12-31	2026-03-16	10-K	26-108435
33	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$3.0M	2023-12-31	2025-03-14	10-K	25-054851
34	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$7.0M	2023-12-31	2025-03-14	10-K	25-054851
35	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$5.2M	2022-12-31	2024-03-08	10-K	24-063674
36	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$23.4M	2022-12-31	2024-03-08	10-K	24-063674
37	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$13.0M	2025-12-31	2026-03-16	10-K	26-108435
38	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$32.1M	2025-12-31	2026-03-16	10-K	26-108435
39	income tax	us-gaap:IncomeTaxExpenseBenefit	-$17.9M	2025-12-31	2026-03-16	10-K	26-108435
40	current assets	us-gaap:AssetsCurrent	$219.2M	2024-12-31	2026-03-16	10-K	26-108435
41	current liabilities	us-gaap:LiabilitiesCurrent	$46.3M	2024-12-31	2026-03-16	10-K	26-108435
42	assets	us-gaap:Assets	$420.5M	2023-12-31	2025-03-14	10-K	25-054851
43	assets	us-gaap:Assets	$516.6M	2022-12-31	2024-03-08	10-K	24-063674
44	shares outstanding	dei:EntityCommonStockSharesOutstanding	36,440,854	2026-03-13	2026-03-16	10-K	26-108435
45	shares outstanding	dei:EntityCommonStockSharesOutstanding	36,883,279	2025-02-28	2025-03-14	10-K	25-054851

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