RBC Bearings Inc.

RBC

NYSE; manufacturing; SIC 3562, Ball & Roller Bearings; CIK 0001324948

C/D

on the C/D boundary of 245 graded peers in manufacturing

rank 143 of 245; percentile 58.2; sampling error 3.0 points; lower is stronger

A B C D E

C/D, the tortoise



Scoreboard

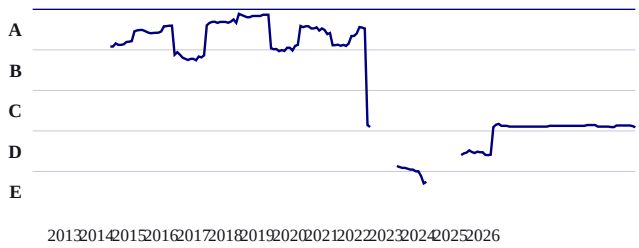
Profitability	C/D percentile 61.7
Solvency	C percentile 43.3
Growth and financing	C percentile 50.4
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $5.1B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress
Inputs computable	11 of 13
Graded from	filings received through May 15, 2026 187 days before the rescan; latest periodic filing 10-Q received Oct 30, 2026
Last close	$474.31 2026-11-17; market equity $15.0B; 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 May 15, 2026

Bearings Incorporated, together with its subsidiaries, is an international manufacturer and marketer of highly engineered precision bearings, components and essential systems for the Industrial and Aerospace & Defense markets. Our precision solutions are integral to the manufacture and operation of most machines and mechanical systems, to reduce wear to moving parts, facilitate proper power transmission, reduce damage and energy loss caused by friction, and control pressure and flow. The terms "we," "us," "our," "RBC" and the "Company" mean RBC Bearings Incorporated and its subsidiaries, unless the context indicates another meaning.

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 61.7						
Gross profitability	16.2%	22.2%		67.9	266	2026-03-28
Return on invested capital	8.1%	9.9%		62.9	98	2026-03-28
Accruals ratio	(2.6%)	(3.7%)		60.7	286	2026-03-28

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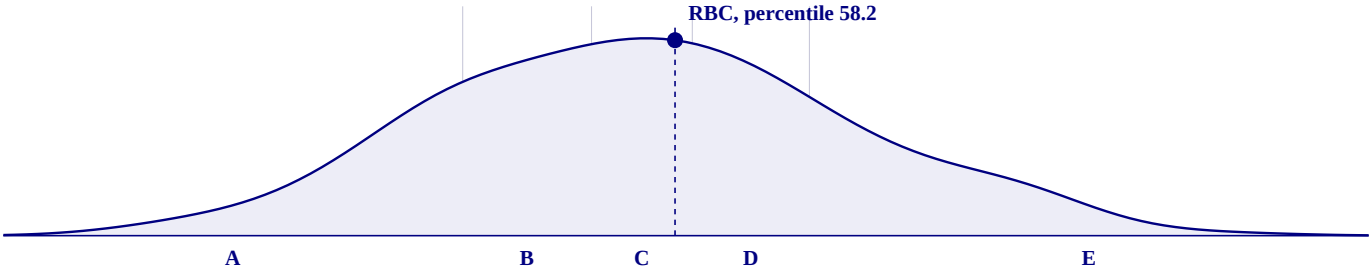
Gross margin stability, five years	2.4 pts	2.1 pts		55.2	222	2026-03-28
Solvency, sleeve percentile 43.3						
Altman Z double-prime	4.49	3.73		35.7	222	2026-03-28
Net debt to EBITDA	1.75x	1.75x		51.3	118	2026-03-28
Interest coverage	8.45x	5.13x		34.5	59	2026-03-28
Current ratio	2.18x	2.26x		51.7	301	2026-03-28
Growth and financing, sleeve percentile 50.4						
Revenue growth, three-year compound	8.4%	2.2%		26.9	261	2026-03-28
Free cash flow growth, three-year compound	not computable	13.5%				
latest aligned inputs end 2023-04-01; latest annual assets end 2026-03-28						
Reinvestment rate	not computable	25.7%				
latest aligned inputs end 2023-04-01; latest annual assets end 2026-03-28						
Asset growth, three years	3.0%	4.2%		56.1	265	2026-03-28
Net share issuance, one year	0.5%	0.0%		68.3	241	2026-05-08

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
138	Insteel Industries Inc. (IIIN)	56.1	C	
139	nVent Electric plc (NVT)	56.6	C	
140	Northern Technologies International Corp. (NTIC)	57.0	C	
141	Steel Dynamics Inc. (STLD)	57.4	C/D	
142	Pentair plc (PNR)	57.8	C/D	
143	RBC Bearings Inc. (RBC)	58.2	C/D	
144	Kaiser Aluminum Corp. (KALU)	58.6	C/D	fortress balance sheet
145	Ingersoll Rand Inc. (IR)	59.0	C/D	
146	Lockheed Martin Corp. (LMT)	59.4	C/D	
147	Lifetime Brands, Inc. (LCUT)	59.8	C/D	
148	FreightCar America, Inc. (RAIL)	60.2	C/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	16.5%	9.9%	58
Distance from 52-week high	(26.7%)	(29.0%)	53
EBIT to enterprise value	2.7%	4.3%	34
Free cash flow yield	1.2%	3.6%	26
Book value to price	0.24	0.37	29
Sales to price	0.12	0.57	6
Composite equity issuance, five years	22.7%	(9.7%)	82
Relative strength against the sector, log excess return	0.07	0.01	58
Twelve-month failure probability, CHS model	not computable	0.04%	

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Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 6 of 9, period end 2026-03-28	
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	fail
No new shares issued	fail
Gross margin improved	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$89.3M
Operating cash flow, four quarters	$485.5M
Months of runway	not finite
Days since last periodic filing	19 (10-Q received Oct 30, 2026)
Median daily dollar volume, 63 sessions	$139.1M

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	$830.2M	2026-03-28	2026-05-15	10-K	26-057626
2	assets	us-gaap:Assets	$5.1B	2026-03-28	2026-05-15	10-K	26-057626
3	operating income	us-gaap:OperatingIncomeLoss	$421.0M	2026-03-28	2026-05-15	10-K	26-057626
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$369.3M	2026-03-28	2026-05-15	10-K	26-057626
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$81.7M	2026-03-28	2026-05-15	10-K	26-057626
6	total debt	us-gaap:LongTermDebt	$875.5M	2026-03-28	2026-05-15	10-K	26-057626
7	book equity	us-gaap:StockholdersEquity	$3.4B	2026-03-28	2026-05-15	10-K	26-057626
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$57.3M	2026-03-28	2026-05-15	10-K	26-057626
9	total debt	us-gaap:LongTermDebt	$920.1M	2025-03-29	2026-05-15	10-K	26-057626
10	book equity	us-gaap:StockholdersEquity	$3.0B	2025-03-29	2026-05-15	10-K	26-057626
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$36.8M	2025-03-29	2026-05-15	10-K	26-057626
12	net income	us-gaap:NetIncomeLoss	$287.6M	2026-03-28	2026-05-15	10-K	26-057626
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$415.7M	2026-03-28	2026-05-15	10-K	26-057626
14	assets	us-gaap:Assets	$4.7B	2025-03-29	2026-05-15	10-K	26-057626
15	revenue	us-gaap:Revenues	$1.9B	2026-03-28	2026-05-15	10-K	26-057626
16	gross profit	us-gaap:GrossProfit	$726.1M	2025-03-29	2026-05-15	10-K	26-057626
17	revenue	us-gaap:Revenues	$1.6B	2025-03-29	2026-05-15	10-K	26-057626
18	gross profit	us-gaap:GrossProfit	$670.5M	2024-03-30	2026-05-15	10-K	26-057626
19	revenue	us-gaap:Revenues	$1.6B	2024-03-30	2026-05-15	10-K	26-057626
20	gross profit	us-gaap:GrossProfit	$604.8M	2023-04-01	2025-05-16	10-K	25-044893
21	revenue	us-gaap:Revenues	$1.5B	2023-04-01	2025-05-16	10-K	25-044893
22	gross profit	us-gaap:GrossProfit	$357.1M	2022-04-30	2022-08-05	10-K/A	22-045106
23	revenue	us-gaap:Revenues	$942.9M	2022-04-30	2022-08-05	10-K/A	22-045106
24	current assets	us-gaap:AssetsCurrent	$1.2B	2026-03-28	2026-05-15	10-K	26-057626
25	current liabilities	us-gaap:LiabilitiesCurrent	$546.2M	2026-03-28	2026-05-15	10-K	26-057626
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$1.7B	2026-03-28	2026-05-15	10-K	26-057626
27	liabilities	us-gaap:Liabilities	$1.8B	2026-03-28	2026-05-15	10-K	26-057626
28	depreciation amortization	us-gaap:Depreciation	$47.8M	2026-03-28	2026-05-15	10-K	26-057626
29	interest expense	us-gaap:InterestExpense	-$49.8M	2026-03-28	2026-05-15	10-K	26-057626
30	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$220.6M	2023-04-01	2025-05-16	10-K	25-044893
31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$42.0M	2023-04-01	2023-05-19	10-K	23-041600

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32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$180.3M	2022-04-02	2024-05-17	10-K	24-044761
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$29.8M	2022-04-02	2023-05-19	10-K	23-041600
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$152.4M	2021-04-03	2023-05-19	10-K	23-041600
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$11.8M	2021-04-03	2023-05-19	10-K	23-041600
36	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$155.6M	2020-03-28	2022-08-05	10-K/A	22-045106
37	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$37.3M	2020-03-28	2022-08-05	10-K/A	22-045106
38	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$115.4M	2023-04-01	2024-05-17	10-K	24-044761
39	operating income	us-gaap:OperatingIncomeLoss	$293.0M	2023-04-01	2025-05-16	10-K	25-044893
40	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$209.7M	2023-04-01	2025-05-16	10-K	25-044893
41	income tax	us-gaap:IncomeTaxExpenseBenefit	$43.0M	2023-04-01	2025-05-16	10-K	25-044893
42	current assets	us-gaap:AssetsCurrent	$913.3M	2023-04-01	2024-05-17	10-K	24-044761
43	current liabilities	us-gaap:LiabilitiesCurrent	$309.3M	2023-04-01	2024-05-17	10-K	24-044761
44	current assets	us-gaap:AssetsCurrent	$962.2M	2022-04-02	2023-05-19	10-K	23-041600
45	current liabilities	us-gaap:LiabilitiesCurrent	$313.5M	2022-04-02	2023-05-19	10-K	23-041600
46	assets	us-gaap:Assets	$4.7B	2024-03-30	2026-05-15	10-K	26-057626
47	assets	us-gaap:Assets	$4.7B	2023-04-01	2025-05-16	10-K	25-044893
48	shares outstanding	dei:EntityCommonStockSharesOutstanding	31,635,359	2026-05-08	2026-05-15	10-K	26-057626
49	shares outstanding	dei:EntityCommonStockSharesOutstanding	31,478,058	2025-05-09	2025-05-16	10-K	25-044893

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