Sono TEK Corp.

SOTK

Nasdaq; manufacturing; SIC 3559, Special Industry Machinery, NEC; CIK 0000806172

A

strongest fifth of 245 graded peers in manufacturing

rank 2 of 245; percentile 0.4; sampling error 3.0 points; lower is stronger

A B C D E

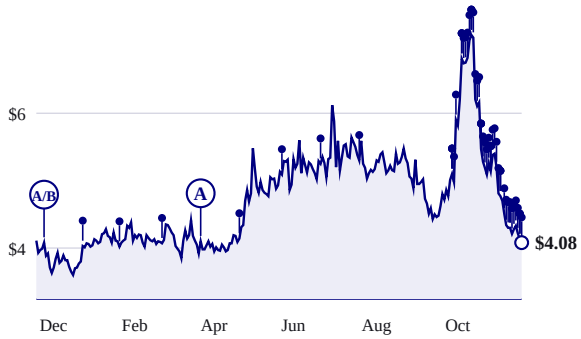
A, the bull



Scoreboard

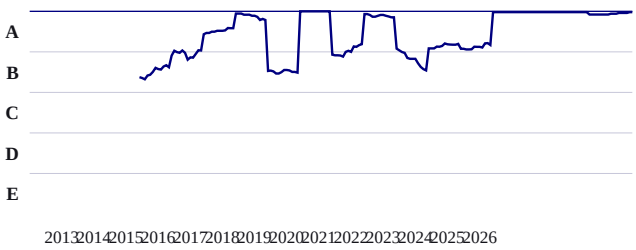
Profitability	A/B percentile 20.7
Solvency	A percentile 15.9
Growth and financing	B percentile 25.2
Reliability	0.83 AUC filers with $12.5M to $120M assets; 95% interval 0.79 to 0.86; 201 events, 2020 to 2025
Peer failure rate	1.07% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$12.5M to $120M assets total assets $26.4M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered; fortress balance sheet
Inputs computable	9 of 13
Graded from	filings received through May 28, 2026 174 days before the rescan; latest periodic filing 10-Q received Oct 14, 2026
Last close	$4.09 2026-11-17; market equity $64.4M; 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 May 28, 2026

"We" or "Our") is the world leader in the design and manufacture of ultrasonic coating systems for applying precise, thin film coatings to add functional properties, protect or strengthen surfaces on parts and components for the microelectronics/electronics, alternative energy, medical, industrial and emerging research & development/other markets.

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 20.7						
Gross profitability	40.0%	22.2%		11.3	266	2026-02-28
Return on invested capital	not computable	9.9%				
one or more required annual facts are missing						
Accruals ratio	(5.8%)	(3.7%)		33.0	286	2026-02-28
Gross margin stability, five years	1.2 pts	2.1 pts		17.6	222	2026-02-28

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Solvency, sleeve percentile 15.9						
Altman Z double-prime	8.78	3.73		10.9	222	2026-02-28
Net debt to EBITDA	not computable	1.75x				
latest aligned inputs end 2021-02-28; latest annual assets end 2026-02-28						
Interest coverage	not computable	5.13x				
interest expense must exceed $100,000						
Current ratio	3.46x	2.26x		21.0	301	2026-02-28
Growth and financing, sleeve percentile 25.2						
Revenue growth, three-year compound	11.6%	2.2%		17.7	261	2026-02-28
Free cash flow growth, three-year compound	57.8%	13.5%		7.2	139	2026-02-28
Reinvestment rate	not computable	25.7%				
one or more required annual facts are missing						
Asset growth, three years	9.4%	4.2%		28.8	265	2026-02-28
Net share issuance, one year	(0.09%)	0.0%		47.1	241	2026-05-19

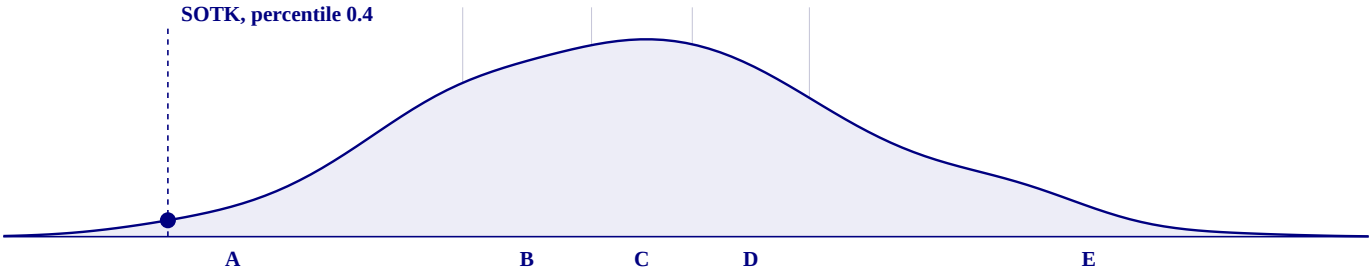
Warnings

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

Check	Measured
Fortress balance sheet	cash minus debt is 3,082,438 USD; Altman Z is not used

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
1	Solaris Energy Infrastructure, Inc. (SEI)	0.0	A	fortress balance sheet
2	Sono TEK Corp. (SOTK)	0.4	A	fortress balance sheet
3	Xpel, Inc. (XPEL)	0.8	A	fortress balance sheet
4	Deckers Outdoor Corp. (DECK)	1.2	A	
5	Cactus, Inc. (WHD)	1.6	A	fortress balance sheet
6	Proto Labs Inc. (PRLB)	2.0	A	fortress balance sheet
7	Franklin Electric Co. Inc. (FELE)	2.5	A	

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	30.5%	9.9%	67
Distance from 52-week high	(43.0%)	(29.0%)	29
EBIT to enterprise value	3.3%	4.3%	40
Free cash flow yield	4.7%	3.6%	62
Book value to price	0.33	0.37	44
Sales to price	0.33	0.57	26
Composite equity issuance, five years	not computable	(9.7%)	
Relative strength against the sector, log excess return	0.18	0.01	67

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Twelve-month failure probability, CHS model	0.04%	0.04%	39

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score None of 9, period end 2026-02-28	
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	fail
Current ratio improved	pass
No new shares issued	pass
Gross margin improved	pass
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$10.2M
Operating cash flow, four quarters	$7.4M
Months of runway	not finite
Days since last periodic filing	35 (10-Q received Oct 14, 2026)
Median daily dollar volume, 63 sessions	$331,898

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	$10.6M	2026-02-28	2026-05-28	10-K	26-000113
2	assets	us-gaap:Assets	$26.4M	2026-02-28	2026-05-28	10-K	26-000113
3	net income	us-gaap:ProfitLoss	$1.8M	2026-02-28	2026-05-28	10-K	26-000113
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$3.2M	2026-02-28	2026-05-28	10-K	26-000113
5	assets	us-gaap:Assets	$23.4M	2025-02-28	2026-05-28	10-K	26-000113
6	revenue	us-gaap:Revenues	$20.9M	2026-02-28	2026-05-28	10-K	26-000113
7	gross profit	us-gaap:GrossProfit	$9.7M	2025-02-28	2026-05-28	10-K	26-000113
8	revenue	us-gaap:Revenues	$20.5M	2025-02-28	2026-05-28	10-K	26-000113
9	gross profit	us-gaap:GrossProfit	$9.8M	2024-02-29	2025-05-28	10-K	25-000195
10	revenue	us-gaap:Revenues	$19.7M	2024-02-29	2025-05-28	10-K	25-000195
11	gross profit	us-gaap:GrossProfit	$7.7M	2023-02-28	2024-05-23	10-K	24-000208
12	revenue	us-gaap:Revenues	$15.1M	2023-02-28	2024-05-23	10-K	24-000208
13	gross profit	us-gaap:GrossProfit	$8.6M	2022-02-28	2023-05-25	10-K	23-000181
14	revenue	us-gaap:Revenues	$17.1M	2022-02-28	2023-05-25	10-K	23-000181
15	current assets	us-gaap:AssetsCurrent	$22.8M	2026-02-28	2026-05-28	10-K	26-000113
16	current liabilities	us-gaap:LiabilitiesCurrent	$6.6M	2026-02-28	2026-05-28	10-K	26-000113
17	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$9.4M	2026-02-28	2026-05-28	10-K	26-000113
18	operating income	us-gaap:OperatingIncomeLoss	$1.8M	2026-02-28	2026-05-28	10-K	26-000113
19	book equity	us-gaap:StockholdersEquity	$19.8M	2026-02-28	2026-05-28	10-K	26-000113
20	liabilities	us-gaap:Liabilities	$6.6M	2026-02-28	2026-05-28	10-K	26-000113
21	total debt	us-gaap:LongTermDebt	$1.0M	2021-02-28	2021-05-28	10-K	21-000215
22	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$4.1M	2021-02-28	2022-05-24	10-K	22-000333
23	operating income	us-gaap:OperatingIncomeLoss	$1.3M	2021-02-28	2022-05-24	10-K	22-000333
24	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$463,076	2021-02-28	2022-05-24	10-K	22-000333
25	interest expense	us-gaap:InterestExpense	$39,843	2021-02-28	2022-05-24	10-K	22-000333
26	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$224,558	2026-02-28	2026-05-28	10-K	26-000113
27	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$525,019	2025-02-28	2026-05-28	10-K	26-000113
28	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$468,798	2025-02-28	2026-05-28	10-K	26-000113
29	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$1.2M	2024-02-29	2025-05-28	10-K	25-000195
30	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$794,690	2024-02-29	2025-05-28	10-K	25-000195

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31	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$1.3M	2023-02-28	2024-05-23	10-K	24-000208
32	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$555,867	2023-02-28	2024-05-23	10-K	24-000208
33	assets	us-gaap:Assets	$23.1M	2024-02-29	2025-05-28	10-K	25-000195
34	assets	us-gaap:Assets	$20.2M	2023-02-28	2024-05-23	10-K	24-000208
35	shares outstanding	dei:EntityCommonStockSharesOutstanding	15,713,747	2026-05-19	2026-05-28	10-K	26-000113
36	shares outstanding	dei:EntityCommonStockSharesOutstanding	15,727,702	2025-05-23	2025-05-28	10-K	25-000195

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