Dorman Products, Inc.

DORM

Nasdaq; consumer durables; SIC 3714, Motor Vehicle Parts & Accessories; CIK 0000868780

A

strongest fifth of 428 graded peers in the pooled consumer gr...

rank 60 of 428; percentile 14.3; sampling error 2.4 points; lower is stronger

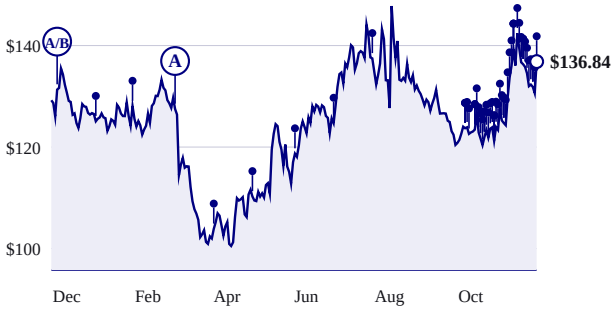
A B C D E

A, the bull



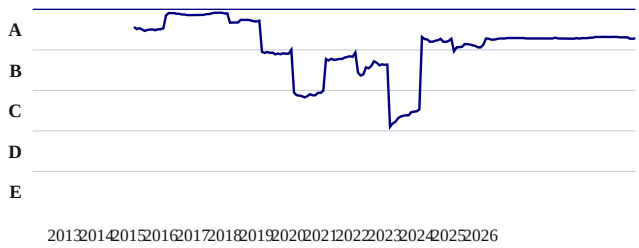
Scoreboard	
Profitability	D percentile 65.1
Solvency	A percentile 14.9
Growth and financing	B percentile 26.5
Reliability	0.91 AUC filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025
Peer failure rate	1.01% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$591M to $2.67B assets total assets $2.5B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress
Inputs computable	9 of 13
Graded from	filings received through Feb 27, 2026 265 days before the rescan; latest periodic filing 10-Q received Oct 27, 2026
Last close	$137.00 2026-11-18; market equity $4.0B; 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 Feb 27, 2026

We are one of the leading suppliers of replacement and upgrade parts in the motor vehicle aftermarket industry, serving passenger cars, light-, medium-, and heavy-duty trucks, as well as specialty vehicles, including utility terrain vehicles ("UTVs") and all-terrain vehicles ("ATVs"). As of December 31, 2025, we marketed approximately 144,000 distinct parts compared to approximately 138,000 as of December 31, 2024, many of which we designed and engineered.

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 65.1						
Gross profitability	36.0%	34.9%		47.1	438	2025-12-31
Return on invested capital	12.4%	9.2%		37.5	145	2025-12-31
Accruals ratio	3.7%	(5.1%)		94.2	485	2025-12-31
Gross margin stability, five years	3.6 pts	1.7 pts		81.6	377	2025-12-31

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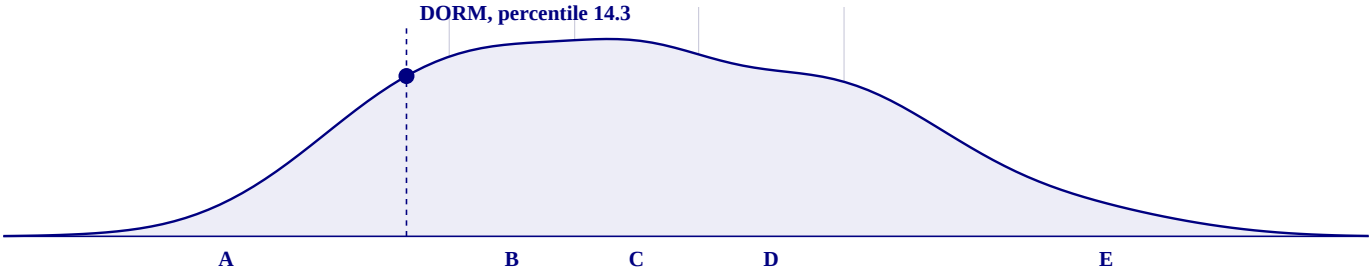
Solvency, sleeve percentile 14.9						
Altman Z double-prime	not computable	2.14				
one or more required annual facts are missing						
Net debt to EBITDA	not computable	2.09x				
required facts have no common fiscal period end						
Interest coverage	not computable	2.97x				
latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31						
Current ratio	3.09x	1.58x		14.9	499	2025-12-31
Growth and financing, sleeve percentile 26.5						
Revenue growth, three-year compound	7.1%	1.4%		23.6	446	2025-12-31
Free cash flow growth, three-year compound	170.9%	7.0%		0.9	234	2025-12-31
Reinvestment rate	not computable	18.0%				
latest aligned inputs end 2016-12-31; latest annual assets end 2025-12-31						
Asset growth, three years	2.1%	2.0%		47.0	448	2025-12-31
Net share issuance, one year	(1.3%)	(0.2%)		34.6	377	2026-02-24

Among 428 peers

consumer durables; 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
55	Village Super Market Inc. (VLGEA)	13.0	A	fortress balance sheet
56	Richardson Electronics, Ltd. (RELL)	13.4	A	
57	Yeti Holdings, Inc. (YETI)	13.7	A	
58	Sally Beauty Holdings, Inc. (SBH)	13.9	A	
59	Atmus Filtration Technologies Inc. (ATMU)	14.1	A	
60	Dorman Products, Inc. (DORM)	14.3	A	
61	Signet Jewelers Ltd. (SIG)	14.3	A	
62	Escalade Inc. (ESCA)	14.5	A	fortress balance sheet
63	Core & Main, Inc. (CNM)	14.7	A	
64	Unifirst Corp. (UNF)	15.1	A	fortress balance sheet
65	Simply Good Foods Co. (SMPL)	15.4	A	

What the price implies

at the 2026-11-18 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(8.6%)	(1.3%)	41
Distance from 52-week high	(7.4%)	(22.8%)	81
EBIT to enterprise value	7.0%	4.9%	72
Free cash flow yield	1.9%	4.4%	31
Book value to price	0.39	0.46	44
Sales to price	0.53	1.42	20
Composite equity issuance, five years	(8.7%)	(16.9%)	62
Relative strength against the sector, log excess return	(0.00)	0.03	47

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Twelve-month failure probability, CHS model	not computable	0.04%

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 8 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	pass
Current ratio improved	pass
No new shares issued	pass
Gross margin improved	pass
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$167.0M
Operating cash flow, four quarters	$302.6M
Months of runway	not finite
Days since last periodic filing	23 (10-Q received Oct 27, 2026)
Median daily dollar volume, 63 sessions	$27.4M

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	$897.7M	2025-12-31	2026-02-27	10-K	26-000014
2	assets	us-gaap:Assets	$2.5B	2025-12-31	2026-02-27	10-K	26-000014
3	operating income	us-gaap:OperatingIncomeLoss	$299.5M	2025-12-31	2026-02-27	10-K	26-000014
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$275.4M	2025-12-31	2026-02-27	10-K	26-000014
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$71.3M	2025-12-31	2026-02-27	10-K	26-000014
6	total debt	us-gaap:LongTermDebt	$440.6M	2025-12-31	2026-02-27	10-K	26-000014
7	book equity	us-gaap:StockholdersEquity	$1.5B	2025-12-31	2026-02-27	10-K	26-000014
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$49.4M	2025-12-31	2026-02-27	10-K	26-000014
9	total debt	us-gaap:LongTermDebt	$468.8M	2024-12-31	2025-02-27	10-K	25-000009
10	book equity	us-gaap:StockholdersEquity	$1.3B	2024-12-31	2026-02-27	10-K	26-000014
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$57.1M	2024-12-31	2026-02-27	10-K	26-000014
12	net income	us-gaap:NetIncomeLoss	$204.2M	2025-12-31	2026-02-27	10-K	26-000014
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$113.6M	2025-12-31	2026-02-27	10-K	26-000014
14	assets	us-gaap:Assets	$2.4B	2024-12-31	2026-02-27	10-K	26-000014
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$2.1B	2025-12-31	2026-02-27	10-K	26-000014
16	gross profit	us-gaap:GrossProfit	$806.4M	2024-12-31	2026-02-27	10-K	26-000014
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$2.0B	2024-12-31	2026-02-27	10-K	26-000014
18	gross profit	us-gaap:GrossProfit	$685.4M	2023-12-31	2026-02-27	10-K	26-000014
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.9B	2023-12-31	2026-02-27	10-K	26-000014
20	gross profit	us-gaap:GrossProfit	$564.5M	2022-12-31	2025-02-27	10-K	25-000009
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.7B	2022-12-31	2025-02-27	10-K	25-000009
22	gross profit	us-gaap:GrossProfit	$462.9M	2021-12-25	2024-02-28	10-K	24-000011
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.3B	2021-12-25	2024-02-28	10-K	24-000011
24	operating income	us-gaap:OperatingIncomeLoss	$214.8M	2023-12-31	2026-02-27	10-K	26-000014
25	interest expense	us-gaap:InterestExpense	$48.1M	2023-12-31	2024-02-28	10-K	24-000011
26	current assets	us-gaap:AssetsCurrent	$1.5B	2025-12-31	2026-02-27	10-K	26-000014
27	current liabilities	us-gaap:LiabilitiesCurrent	$492.8M	2025-12-31	2026-02-27	10-K	26-000014
28	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$38.0M	2025-12-31	2026-02-27	10-K	26-000014
29	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$231.0M	2024-12-31	2026-02-27	10-K	26-000014
30	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$39.4M	2024-12-31	2026-02-27	10-K	26-000014

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31	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$208.8M	2023-12-31	2026-02-27	10-K	26-000014
32	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$44.0M	2023-12-31	2026-02-27	10-K	26-000014
33	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$41.7M	2022-12-31	2025-02-27	10-K	25-000009
34	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$37.9M	2022-12-31	2025-02-27	10-K	25-000009
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$20.1M	2016-12-31	2019-02-26	10-K	19-004498
36	depreciation amortization	us-gaap:Depreciation	$18.7M	2016-12-31	2017-02-27	10-K	17-058492
37	operating income	us-gaap:OperatingIncomeLoss	$168.6M	2016-12-31	2019-02-26	10-K	19-004498
38	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$168.4M	2016-12-31	2019-02-26	10-K	19-004498
39	income tax	us-gaap:IncomeTaxExpenseBenefit	$62.3M	2016-12-31	2019-02-26	10-K	19-004498
40	current assets	us-gaap:AssetsCurrent	$551.6M	2016-12-31	2018-02-27	10-K	18-003466
41	current liabilities	us-gaap:LiabilitiesCurrent	$103.8M	2016-12-31	2018-02-27	10-K	18-003466
42	current assets	us-gaap:AssetsCurrent	$478.6M	2015-12-26	2017-02-27	10-K	17-058492
43	current liabilities	us-gaap:LiabilitiesCurrent	$98.6M	2015-12-26	2017-02-27	10-K	17-058492
44	assets	us-gaap:Assets	$2.3B	2023-12-31	2026-02-27	10-K	26-000014
45	assets	us-gaap:Assets	$2.3B	2022-12-31	2025-02-27	10-K	25-000009
46	shares outstanding	dei:EntityCommonStockSharesOutstanding	30,183,260	2026-02-24	2026-02-27	10-K	26-000014
47	shares outstanding	dei:EntityCommonStockSharesOutstanding	30,581,562	2025-02-24	2025-02-27	10-K	25-000009

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