Gibraltar Industries, Inc. ROCK

Nasdaq; manufacturing; SIC 3310, Steel Works, Blast Furnaces & Rolling & Finishing Mills; CIK 0000912562

B/C

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

rank 97 of 245; percentile 39.3; sampling error 3.0 points; lower is stronger

A B C D E

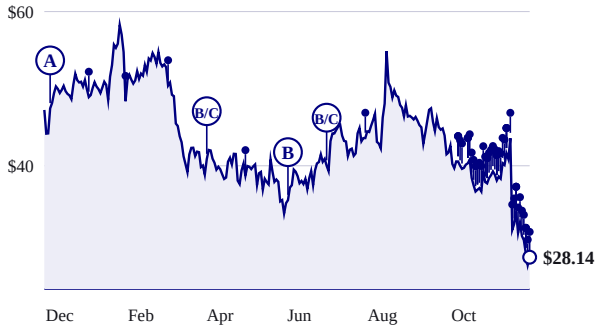
B/C, the elk



Scoreboard

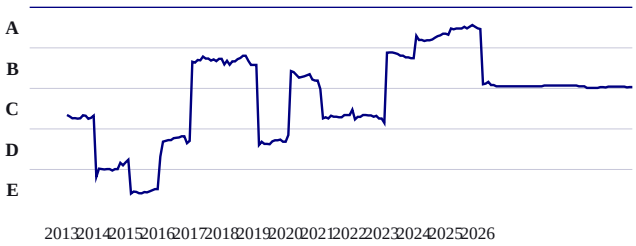
Profitability	B/C	percentile 40.4
Solvency	B/C	percentile 37.8
Growth and financing	C/D	percentile 59.1
Reliability	0.91 AUC	filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025
Peer failure rate	1.01% a year	Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$591M to $2.67B assets	total assets $1.4B
Standard universe	inside	revenue above $1M and assets above $10M
Warnings	none triggered; fortress balance sheet	not computable: distress
Inputs computable	11 of 13	
Graded from	filings received through Feb 26, 2026	266 days before the rescan; latest periodic filing 10-Q received Nov 5, 2026
Last close	$28.12	2026-11-18; market equity $835.3M; 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 26, 2026

Gibraltar Industries, Inc. (the "Company" or "Gibraltar") is a leading manufacturer and provider of products and services for the residential, agtech and infrastructure markets. Gibraltar's mission, to make life better for people and the planet, is fueled by advancing the disciplines of engineering, science, and technology. On February 2, 2026, Gibraltar acquired OmniMax International, LLC ("OmniMax"), a leading United States of America ("U.S.") and Canada-based manufacturer and provider of residential roofing accessories and rainwater management systems.

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 40.4						
Gross profitability	21.9%	22.2%		48.1	267	2025-12-31
Return on invested capital	11.7%	9.9%		39.2	98	2025-12-31
Accruals ratio	(15.0%)	(3.7%)		11.2	286	2025-12-31

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Gross margin stability, five years	2.9 pts	2.1 pts	62.9	222	2025-12-31
Solvency, sleeve percentile 37.8					
Altman Z double-prime	not computable	3.73			
one or more required annual facts are missing					
Net debt to EBITDA	(0.76x)	1.75x	9.4	118	2025-12-31
Interest coverage	not computable	5.13x			
latest aligned inputs end 2018-12-31; latest annual assets end 2025-12-31					
Current ratio	1.72x	2.26x	66.1	302	2025-12-31
Growth and financing, sleeve percentile 59.1					
Revenue growth, three-year compound	(6.5%)	2.2%	86.5	261	2025-12-31
Free cash flow growth, three-year compound	13.5%	13.7%	51.8	140	2025-12-31
Reinvestment rate	(123.7%)	25.7%	94.9	138	2025-12-31
Asset growth, three years	4.8%	4.2%	45.8	265	2025-12-31
Net share issuance, one year	(2.7%)	0.0%	16.7	241	2026-02-24

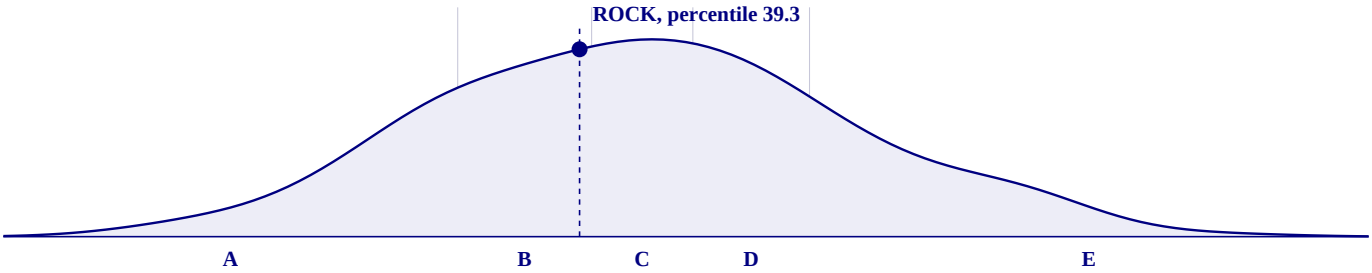
Warnings

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

Check	Measured
Fortress balance sheet	cash minus debt is 115,724,000 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
92	Veeco Instruments Inc. (VECO)	37.3	B/C	
93	AZZ Inc. (AZZ)	37.7	B/C	
94	Perma-Pipe International Holdings, Inc. (PPIH)	38.1	B/C	late filer, fortress balance sheet
95	Advanced Drainage Systems, Inc. (WMS)	38.5	B/C	
96	Parker-Hannifin Corp. (PH)	38.9	B/C	
97	Gibraltar Industries, Inc. (ROCK)	39.3	B/C	fortress balance sheet
98	Virco MFG Corporation (VIRC)	39.8	B/C	fortress balance sheet
99	OIL States International, Inc. (OIS)	40.2	B/C	fortress balance sheet
100	Bloom Energy Corp. (BE)	40.6	B/C	
101	TransDigm Group Inc. (TDG)	41.0	B/C	
102	Friedman Industries Inc. (FRD)	41.4	B/C	

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	(36.5%)	9.9%	12
Distance from 52-week high	(51.7%)	(27.8%)	20
EBIT to enterprise value	6.0%	4.2%	72
Free cash flow yield	14.4%	3.6%	93

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Book value to price	1.08	0.37	90
Sales to price	1.36	0.57	74
Composite equity issuance, five years	(9.2%)	(9.4%)	51
Relative strength against the sector, log excess return	(0.54)	0.01	12
Twelve-month failure probability, CHS model	not computable	0.04%	

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 3 of 9, period end 2025-12-31	
Return on assets above zero	fail
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	pass
Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$35.2M
Operating cash flow, four quarters	-$737,000
Months of runway	572.9
Days since last periodic filing	14 (10-Q received Nov 5, 2026)
Median daily dollar volume, 63 sessions	$14.3M

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	$305.2M	2025-12-31	2026-02-26	10-K	26-000025
2	assets	us-gaap:Assets	$1.4B	2025-12-31	2026-02-26	10-K	26-000025
3	operating income	us-gaap:OperatingIncomeLoss	$122.8M	2025-12-31	2026-02-26	10-K	26-000025
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$126.6M	2025-12-31	2026-02-26	10-K	26-000025
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$29.0M	2025-12-31	2026-02-26	10-K	26-000025
6	total debt	us-gaap:LongTermDebt	$0	2025-12-31	2026-02-26	10-K	26-000025
7	book equity	us-gaap:StockholdersEquity	$950.4M	2025-12-31	2026-02-26	10-K	26-000025
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$115.7M	2025-12-31	2026-02-26	10-K	26-000025
9	total debt	us-gaap:LongTermDebt	$0	2024-12-31	2026-02-26	10-K	26-000025
10	book equity	us-gaap:StockholdersEquity	$1.0B	2024-12-31	2026-02-26	10-K	26-000025
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$269.5M	2024-12-31	2026-02-26	10-K	26-000025
12	net income	us-gaap:NetIncomeLoss	-$44.4M	2025-12-31	2026-02-26	10-K	26-000025
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$167.0M	2025-12-31	2026-02-26	10-K	26-000025
14	assets	us-gaap:Assets	$1.4B	2024-12-31	2026-02-26	10-K	26-000025
15	revenue	us-gaap:Revenues	$1.1B	2025-12-31	2026-02-26	10-K	26-000025
16	gross profit	us-gaap:GrossProfit	$301.4M	2024-12-31	2026-02-26	10-K	26-000025
17	revenue	us-gaap:Revenues	$1.0B	2024-12-31	2026-02-26	10-K	26-000025
18	gross profit	us-gaap:GrossProfit	$281.9M	2023-12-31	2026-02-26	10-K	26-000025
19	revenue	us-gaap:Revenues	$1.0B	2023-12-31	2026-02-26	10-K	26-000025
20	gross profit	us-gaap:GrossProfit	$318.7M	2022-12-31	2025-02-19	10-K	25-000007
21	revenue	us-gaap:Revenues	$1.4B	2022-12-31	2025-02-19	10-K	25-000007
22	gross profit	us-gaap:GrossProfit	$290.0M	2021-12-31	2024-02-21	10-K	24-000012
23	revenue	us-gaap:Revenues	$1.3B	2021-12-31	2024-02-21	10-K	24-000012
24	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$29.8M	2025-12-31	2026-02-26	10-K	26-000025
25	operating income	us-gaap:OperatingIncomeLoss	$81.1M	2018-12-31	2021-02-25	10-K	21-000007

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26	interest expense	us-gaap:InterestExpense	$12.1M	2018-12-31	2019-02-27	10-K	19-000009
27	current assets	us-gaap:AssetsCurrent	$628.9M	2025-12-31	2026-02-26	10-K	26-000025
28	current liabilities	us-gaap:LiabilitiesCurrent	$366.0M	2025-12-31	2026-02-26	10-K	26-000025
29	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$46.4M	2025-12-31	2026-02-26	10-K	26-000025
30	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$174.3M	2024-12-31	2026-02-26	10-K	26-000025
31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$17.4M	2024-12-31	2026-02-26	10-K	26-000025
32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$218.5M	2023-12-31	2026-02-26	10-K	26-000025
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$13.9M	2023-12-31	2026-02-26	10-K	26-000025
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$102.7M	2022-12-31	2025-02-19	10-K	25-000007
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$20.1M	2022-12-31	2025-02-19	10-K	25-000007
36	current assets	us-gaap:AssetsCurrent	$651.3M	2024-12-31	2026-02-26	10-K	26-000025
37	current liabilities	us-gaap:LiabilitiesCurrent	$254.9M	2024-12-31	2026-02-26	10-K	26-000025
38	assets	us-gaap:Assets	$1.3B	2023-12-31	2025-02-19	10-K	25-000007
39	assets	us-gaap:Assets	$1.2B	2022-12-31	2025-02-19	10-K	25-000007
40	shares outstanding	dei:EntityCommonStockSharesOutstanding	29,547,065	2026-02-24	2026-02-26	10-K	26-000025
41	shares outstanding	dei:EntityCommonStockSharesOutstanding	30,355,836	2025-02-17	2025-02-19	10-K	25-000007

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