Climb Global Solutions, Inc.

CLMB

Nasdaq; shops; SIC 5045, Wholesale-Computers & Peripheral Equipment & Software; CIK 0000945983

C

middle fifth of 239 graded peers in shops

rank 129 of 239; percentile 53.8; sampling error 3.0 points; lower is stronger

A B C D E

C, the tortoise



Scoreboard	
Profitability	D percentile 74.0
Solvency	C percentile 55.9
Growth and financing	A/B percentile 21.4
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 $460.2M
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 Feb 27, 2026 266 days before the rescan; latest periodic filing 10-Q received Oct 29, 2026
Last close	$41.97 2026-11-19; market equity $783.0M; 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

The Company is a value added information technology ("IT") distribution and solutions company. The Company primarily operates through its "Distribution" segment, which distributes emerging and disruptive technologies to corporate resellers, value added resellers ("VARs"), consultants and systems integrators worldwide under the name "Climb Channel Solutions". The Company also operates a smaller segment called "Solutions", which is a cloud solutions provider and value-added reseller of software, hardware and services for customers worldwide under the name "Grey Matter".

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 74.0						
Gross profitability	22.9%	43.5%		78.4	223	2025-12-31
Return on invested capital	not computable	11.5%				

latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31

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Accruals ratio	1.0%	(4.9%)		91.8	268	2025-12-31
Gross margin stability, five years	1.3 pts	1.2 pts		51.7	202	2025-12-31
Solvency, sleeve percentile 55.9						
Altman Z double-prime	1.92	1.93		48.5	197	2025-12-31
Net debt to EBITDA	not computable	1.46x				
latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31						
Interest coverage	not computable	2.71x				
one or more required annual facts are missing						
Current ratio	1.11x	1.34x		63.4	274	2025-12-31
Growth and financing, sleeve percentile 21.4						
Revenue growth, three-year compound	28.9%	1.8%		2.4	250	2025-12-31
Free cash flow growth, three-year compound	not computable	4.7%				
current FCF must be positive and base FCF must exceed $100,000						
Reinvestment rate	not computable	13.3%				
latest aligned inputs end 2019-12-31; latest annual assets end 2025-12-31						
Asset growth, three years	25.7%	3.3%		2.8	251	2025-12-31
Net share issuance, one year	0.2%	(0.6%)		59.0	206	2026-02-17

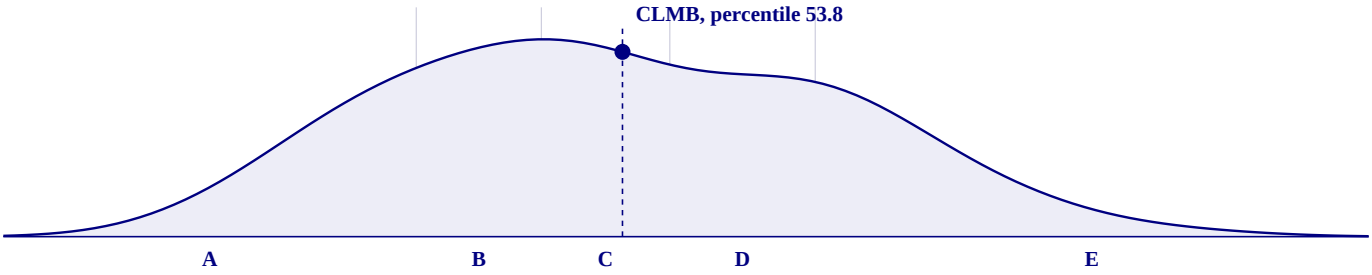
Warnings

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

Check	Measured
Fortress balance sheet	cash minus debt is 34,995,000 USD; Altman Z is not used

Among 239 peers

shops; 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
124	Walmart Inc. (WMT)	51.7	C	
125	Darden Restaurants Inc. (DRI)	52.1	C	
126	Insight Enterprises Inc. (NSIT)	52.5	C	
127	Hudson Technologies Inc. (HDSN)	52.9	C	
128	Lithia Motors Inc. (LAD)	53.4	C	
129	Climb Global Solutions, Inc. (CLMB)	53.8	C	fortress balance sheet
130	Penske Automotive Group, Inc. (PAG)	54.2	C	
131	Victoria's Secret & Co. (VSXY)	54.6	C	
132	Arrow Electronics, Inc. (ARW)	55.0	C	
133	Yum China Holdings, Inc. (YUMC)	55.5	C	
134	Cheesecake Factory Inc. (CAKE)	55.9	C	

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What the price implies

at the 2026-11-19 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	15.8%	(0.5%)	65
Distance from 52-week high	(2.9%)	(23.4%)	97
EBIT to enterprise value	4.1%	5.4%	37
Free cash flow yield	0.4%	4.1%	25
Book value to price	0.17	0.38	30
Sales to price	0.83	1.64	31
Composite equity issuance, five years	(2.1%)	(17.2%)	78
Relative strength against the sector, log excess return	0.24	0.08	65
Twelve-month failure probability, CHS model	not computable	0.03%	

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 5 of 9, period end 2025-12-31	
Return on assets above zero	pass
Operating cash flow above zero	pass
Return on assets improved	fail
Operating cash flow exceeds net income	fail
Long-term leverage fell	pass
Current ratio improved	pass
No new shares issued	fail
Gross margin improved	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$66.9M
Operating cash flow, four quarters	$32.2M
Months of runway	not finite
Days since last periodic filing	22 (10-Q received Oct 29, 2026)
Median daily dollar volume, 63 sessions	$5.4M

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	$105.3M	2025-12-31	2026-02-27	10-K	26-006072
2	assets	us-gaap:Assets	$460.2M	2025-12-31	2026-02-27	10-K	26-006072
3	operating income	us-gaap:OperatingIncomeLoss	$16.5M	2023-12-31	2026-02-27	10-K	26-006072
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$16.8M	2023-12-31	2026-02-27	10-K	26-006072
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$4.5M	2023-12-31	2026-02-27	10-K	26-006072
6	total debt	us-gaap:LongTermDebt	$1.3M	2023-12-31	2024-03-05	10-K	24-002476
7	book equity	us-gaap:StockholdersEquity	$74.8M	2023-12-31	2026-02-27	10-K	26-006072
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$36.3M	2023-12-31	2025-03-11	10-K	25-006986
9	total debt	us-gaap:LongTermDebt	$1.8M	2022-12-31	2024-03-05	10-K	24-002476
10	book equity	us-gaap:StockholdersEquity	$60.6M	2022-12-31	2026-02-27	10-K	26-006072
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$20.2M	2022-12-31	2024-03-05	10-K	24-002476
12	net income	us-gaap:NetIncomeLoss	$21.3M	2025-12-31	2026-02-27	10-K	26-006072
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$16.6M	2025-12-31	2026-02-27	10-K	26-006072
14	assets	us-gaap:Assets	$469.2M	2024-12-31	2026-02-27	10-K	26-006072
15	revenue	us-gaap:Revenues	$652.5M	2025-12-31	2026-02-27	10-K	26-006072
16	gross profit	us-gaap:GrossProfit	$91.1M	2024-12-31	2026-02-27	10-K	26-006072
17	revenue	us-gaap:Revenues	$465.6M	2024-12-31	2026-02-27	10-K	26-006072

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18	gross profit	us-gaap:GrossProfit	$64.2M	2023-12-31	2026-02-27	10-K	26-006072
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$352.0M	2023-12-31	2024-03-05	10-K	24-002476
20	gross profit	us-gaap:GrossProfit	$54.1M	2022-12-31	2024-03-05	10-K	24-002476
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$304.3M	2022-12-31	2024-03-05	10-K	24-002476
22	gross profit	us-gaap:GrossProfit	$45.7M	2021-12-31	2023-03-16	10-K	23-004053
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$282.6M	2021-12-31	2023-03-16	10-K	23-004053
24	current assets	us-gaap:AssetsCurrent	$374.2M	2025-12-31	2026-02-27	10-K	26-006072
25	current liabilities	us-gaap:LiabilitiesCurrent	$337.5M	2025-12-31	2026-02-27	10-K	26-006072
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$87.0M	2025-12-31	2026-02-27	10-K	26-006072
27	operating income	us-gaap:OperatingIncomeLoss	$29.2M	2025-12-31	2026-02-27	10-K	26-006072
28	book equity	us-gaap:StockholdersEquity	$116.6M	2025-12-31	2026-02-27	10-K	26-006072
29	liabilities	us-gaap:Liabilities	$343.7M	2025-12-31	2026-02-27	10-K	26-006072
30	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$2.8M	2023-12-31	2026-02-27	10-K	26-006072
31	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$3.2M	2019-12-31	2021-03-16	10-K	21-003044
32	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$106,000	2019-12-31	2020-03-04	10-K	20-002020
33	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$13.9M	2018-12-31	2020-03-04	10-K	20-002020
34	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$266,000	2018-12-31	2020-03-04	10-K	20-002020
35	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$2.0M	2017-12-31	2019-03-18	10-K	19-002250
36	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$359,000	2017-12-31	2019-03-18	10-K	19-002250
37	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesC...	-$516,000	2016-12-31	2017-02-21	10-K	17-000723
38	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$1.0M	2016-12-31	2019-03-18	10-K	19-002250
39	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$488,000	2019-12-31	2021-03-16	10-K	21-003044
40	operating income	us-gaap:OperatingIncomeLoss	$8.5M	2019-12-31	2021-03-16	10-K	21-003044
41	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$9.0M	2019-12-31	2021-03-16	10-K	21-003044
42	income tax	us-gaap:IncomeTaxExpenseBenefit	$2.3M	2019-12-31	2021-03-16	10-K	21-003044
43	current assets	us-gaap:AssetsCurrent	$121.5M	2019-12-31	2021-03-16	10-K	21-003044
44	current liabilities	us-gaap:LiabilitiesCurrent	$78.7M	2019-12-31	2021-03-16	10-K	21-003044
45	current assets	us-gaap:AssetsCurrent	$102.9M	2018-12-31	2020-03-04	10-K	20-002020
46	current liabilities	us-gaap:LiabilitiesCurrent	$66.7M	2018-12-31	2020-03-04	10-K	20-002020
47	assets	us-gaap:Assets	$335.1M	2023-12-31	2025-03-11	10-K	25-006986
48	assets	us-gaap:Assets	$231.9M	2022-12-31	2024-03-05	10-K	24-002476
49	shares outstanding	dei:EntityCommonStockSharesOutstanding	4,605,692	2026-02-17	2026-02-27	10-K	26-006072
50	shares outstanding	dei:EntityCommonStockSharesOutstanding	4,597,295	2025-02-24	2025-03-11	10-K	25-006986

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