Core Molding Technologies Inc.

CMT

NYSE; manufacturing; SIC 3089, Plastics Products, NEC; CIK 0001026655

B

second fifth of 246 graded peers in manufacturing

rank 77 of 246; percentile 31.0; sampling error 3.0 points; lower is stronger

A B C D E

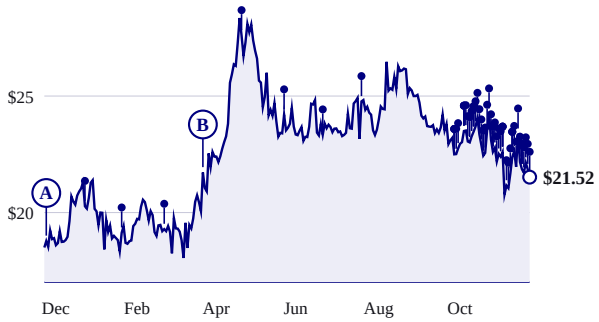
B, the elk



Scoreboard

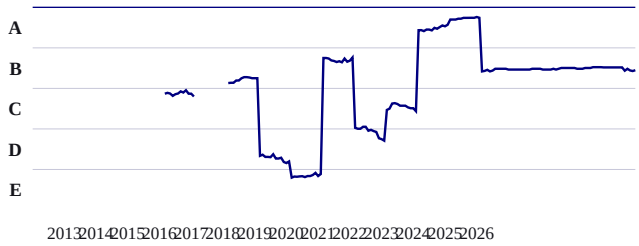
Profitability	C percentile 52.0
Solvency	A/B percentile 18.8
Growth and financing	C/D percentile 57.5
Reliability	0.87 AUC filers with $120M to $591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025
Peer failure rate	1.03% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$120M to $591M assets total assets $228.1M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered; fortress balance sheet not computable: distress
Inputs computable	12 of 13
Graded from	filings received through Mar 10, 2026 256 days before the rescan; latest periodic filing 10-Q received Nov 4, 2026
Last close	$21.68 2026-11-19; market equity $191.7M; 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 Mar 10, 2026

Core Molding Technologies, Inc. (the "Company") and its subsidiaries operate in the engineered materials market as one operating segment as a molder of thermoplastic and thermoset structural products. The Company produces and sells molded products for varied markets, including medium and heavy-duty trucks, power sports, building products and other industrial markets. Core Molding Technologies has its headquarters in Columbus, Ohio, and operates six production facilities in the United States, Canada and Mexico.

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 52.0						
Gross profitability	20.9%	22.3%		52.6	267	2025-12-31
Return on invested capital	8.2%	9.9%		60.8	98	2025-12-31
Accruals ratio	(3.7%)	(3.7%)		51.2	288	2025-12-31
Gross margin stability, five years	2.0 pts	2.1 pts		43.4	222	2025-12-31

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Solvency, sleeve percentile 18.8						
Altman Z double-prime	6.88	3.74		17.6	223	2025-12-31
Net debt to EBITDA	(0.77x)	1.75x		8.5	118	2025-12-31
Interest coverage	not computable	5.13x				
interest expense must exceed $100,000						
Current ratio	3.02x	2.30x		30.2	302	2025-12-31
Growth and financing, sleeve percentile 57.5						
Revenue growth, three-year compound	(10.1%)	2.3%		93.5	261	2025-12-31
Free cash flow growth, three-year compound	(7.1%)	13.5%		81.2	139	2025-12-31
Reinvestment rate	72.8%	24.5%		26.6	140	2025-12-31
Asset growth, three years	4.7%	4.2%		47.3	265	2025-12-31
Net share issuance, one year	(0.7%)	(0.04%)		38.9	240	2026-03-09

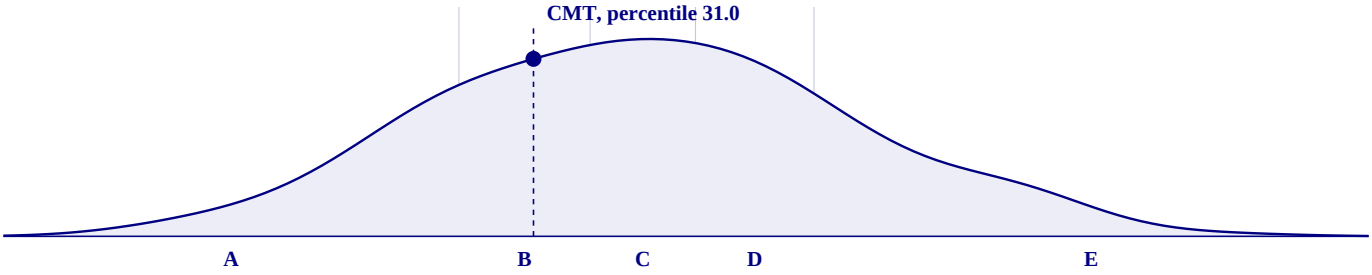
Warnings

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

Check	Measured
Fortress balance sheet	cash minus debt is 20,419,000 USD; Altman Z is not used

Among 246 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
72	Smith & Wesson Brands, Inc. (SWBI)	29.0	B	
73	Sturm Ruger & Co. Inc. (RGR)	29.4	B	
74	CRH Public Ltd. Co. (CRH)	29.8	B	
75	Flowserve Corp. (FLS)	30.2	B	
76	Mueller Industries Inc. (MLI)	30.6	B	fortress balance sheet
77	Core Molding Technologies Inc. (CMT)	31.0	B	fortress balance sheet
78	Lindsay Corp. (LNN)	31.4	B	fortress balance sheet
79	Twin Disc Inc. (TWIN)	31.8	B	
80	CPS Technologies (CPSH)	32.2	B	fortress balance sheet
81	CPI Card Group Inc. (PMTS)	32.7	B	
82	Snap-on Inc. (SNA)	33.1	B	fortress balance sheet

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	27.0%	10.0%	66
Distance from 52-week high	(24.1%)	(32.1%)	68
EBIT to enterprise value	7.5%	4.5%	81
Free cash flow yield	1.0%	3.8%	27
Book value to price	0.85	0.39	80
Sales to price	1.44	0.60	74

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Composite equity issuance, five years	not computable	(9.5%)	
Relative strength against the sector, log excess return	0.15	0.01	66
Twelve-month failure probability, CHS model	not computable	0.04%	

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 6 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	pass
Long-term leverage fell	pass
Current ratio improved	pass
No new shares issued	pass
Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$5.4M
Operating cash flow, four quarters	$8.4M
Months of runway	not finite
Days since last periodic filing	17 (10-Q received Nov 4, 2026)
Median daily dollar volume, 63 sessions	$753,110

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	$47.6M	2025-12-31	2026-03-10	10-K	26-000009
2	assets	us-gaap:Assets	$228.1M	2025-12-31	2026-03-10	10-K	26-000009
3	operating income	us-gaap:OperatingIncomeLoss	$14.2M	2025-12-31	2026-03-10	10-K	26-000009
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$14.7M	2025-12-31	2026-03-10	10-K	26-000009
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$3.5M	2025-12-31	2026-03-10	10-K	26-000009
6	total debt	us-gaap:LongTermDebt	$17.6M	2025-12-31	2026-03-10	10-K	26-000009
7	book equity	us-gaap:StockholdersEquity	$158.2M	2025-12-31	2026-03-10	10-K	26-000009
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$38.1M	2025-12-31	2026-03-10	10-K	26-000009
9	total debt	us-gaap:LongTermDebt	$19.7M	2024-12-31	2026-03-10	10-K	26-000009
10	book equity	us-gaap:StockholdersEquity	$147.4M	2024-12-31	2026-03-10	10-K	26-000009
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$41.8M	2024-12-31	2026-03-10	10-K	26-000009
12	net income	us-gaap:NetIncomeLoss	$11.2M	2025-12-31	2026-03-10	10-K	26-000009
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$19.2M	2025-12-31	2026-03-10	10-K	26-000009
14	assets	us-gaap:Assets	$209.6M	2024-12-31	2026-03-10	10-K	26-000009
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$273.8M	2025-12-31	2026-03-10	10-K	26-000009
16	gross profit	us-gaap:GrossProfit	$53.3M	2024-12-31	2026-03-10	10-K	26-000009
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$302.4M	2024-12-31	2026-03-10	10-K	26-000009
18	gross profit	us-gaap:GrossProfit	$64.5M	2023-12-31	2026-03-10	10-K	26-000009
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$357.7M	2023-12-31	2026-03-10	10-K	26-000009
20	gross profit	us-gaap:GrossProfit	$52.4M	2022-12-31	2025-03-11	10-K	25-000005
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$377.4M	2022-12-31	2025-03-11	10-K	25-000005
22	gross profit	us-gaap:GrossProfit	$41.3M	2021-12-31	2024-03-12	10-K	24-000030
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$307.5M	2021-12-31	2024-03-12	10-K	24-000030
24	current assets	us-gaap:AssetsCurrent	$103.3M	2025-12-31	2026-03-10	10-K	26-000009
25	current liabilities	us-gaap:LiabilitiesCurrent	$34.2M	2025-12-31	2026-03-10	10-K	26-000009
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$146.6M	2025-12-31	2026-03-10	10-K	26-000009
27	liabilities	us-gaap:Liabilities	$70.0M	2025-12-31	2026-03-10	10-K	26-000009

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28	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$12.3M	2025-12-31	2026-03-10	10-K	26-000009
29	interest expense	us-gaap:InterestExpense	$1,000	2025-12-31	2026-03-10	10-K	26-000009
30	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$17.3M	2025-12-31	2026-03-10	10-K	26-000009
31	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$35.2M	2024-12-31	2026-03-10	10-K	26-000009
32	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$11.5M	2024-12-31	2026-03-10	10-K	26-000009
33	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$34.8M	2023-12-31	2026-03-10	10-K	26-000009
34	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$9.1M	2023-12-31	2026-03-10	10-K	26-000009
35	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$19.0M	2022-12-31	2025-03-11	10-K	25-000005
36	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$16.6M	2022-12-31	2025-03-11	10-K	25-000005
37	current assets	us-gaap:AssetsCurrent	$102.9M	2024-12-31	2026-03-10	10-K	26-000009
38	current liabilities	us-gaap:LiabilitiesCurrent	$36.7M	2024-12-31	2026-03-10	10-K	26-000009
39	assets	us-gaap:Assets	$213.4M	2023-12-31	2025-03-11	10-K	25-000005
40	assets	us-gaap:Assets	$198.6M	2022-12-31	2024-03-12	10-K	24-000030
41	shares outstanding	dei:EntityCommonStockSharesOutstanding	8,833,231	2026-03-09	2026-03-10	10-K	26-000009
42	shares outstanding	dei:EntityCommonStockSharesOutstanding	8,895,735	2025-03-11	2025-03-11	10-K	25-000005

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