KEY Tronic Corp.

KTCC

Nasdaq; business equipment; SIC 3672, Printed Circuit Boards; CIK 0000719733

D

fourth fifth of 469 graded peers in business equipment

rank 294 of 469; percentile 62.6; sampling error 2.3 points; lower is stronger

A B C D E

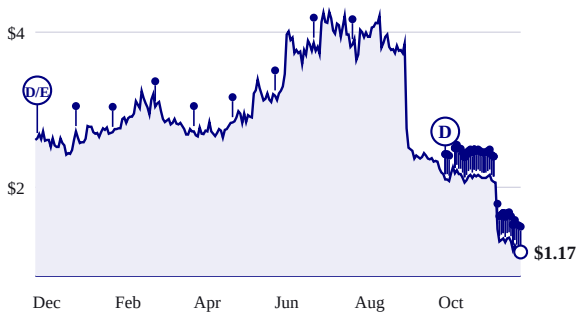
D, the sloth



Scoreboard

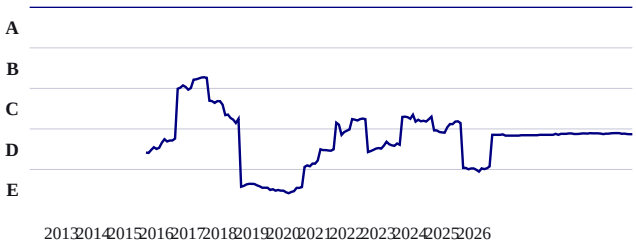
Profitability	B/C percentile 38.3
Solvency	C percentile 42.8
Growth and financing	D/E percentile 78.4
Reliability	0.87 AUC filers with $120M to $591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025
Peer failure rate	1.03% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$120M to $591M assets total assets $299.8M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	short runway not computable: distress
Inputs computable	7 of 13
Graded from	filings received through Sep 24, 2026 58 days before the rescan; latest periodic filing 10-Q received Nov 9, 2026
Last close	$1.17 2026-11-20; market equity $12.9M; 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 Sep 24, 2026

Key Tronic Corporation was organized in 1969, as a Washington corporation that locally manufactured computer keyboards. The ability to design, build and deliver a quality product led us to become a leading independent manufacturer of keyboards for computers in the United States. Our fully integrated design, tooling, and automated manufacturing capabilities enabled us to rapidly respond to customers' needs for keyboards in production quantities worldwide. We supported our sales growth through the development and purchase of international manufacturing facilities.

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 38.3						
Gross profitability	8.0%	29.4%		86.1	513	2026-06-27
Return on invested capital	not computable	11.2%				
pretax income must exceed the validity floor and imply a 0%-100% tax rate						

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Accruals ratio	(17.0%)	(7.4%)	22.1	566	2026-06-27
Gross margin stability, five years	0.7 pts	2.3 pts	6.7	406	2026-06-27
Solvency, sleeve percentile 42.8					
Altman Z double-prime	2.78	2.18	39.3	517	2026-06-27
Net debt to EBITDA	not computable	1.11x			
EBITDA must exceed $100,000					
Interest coverage	not computable	4.90x			
latest aligned inputs end 2023-07-01; latest annual assets end 2026-06-27					
Current ratio	2.10x	1.98x	46.2	600	2026-06-27
Growth and financing, sleeve percentile 78.4					
Revenue growth, three-year compound	(13.9%)	6.6%	91.0	503	2026-06-27
Free cash flow growth, three-year compound	not computable	17.4%			
current FCF must be positive and base FCF must exceed $100,000					
Reinvestment rate	not computable	14.3%			
pretax income must exceed the validity floor and imply a 0%-100% tax rate					
Asset growth, three years	not computable	5.0%			
four consecutive annual observations are required					
Net share issuance, one year	2.7%	0.5%	65.8	404	2026-09-21

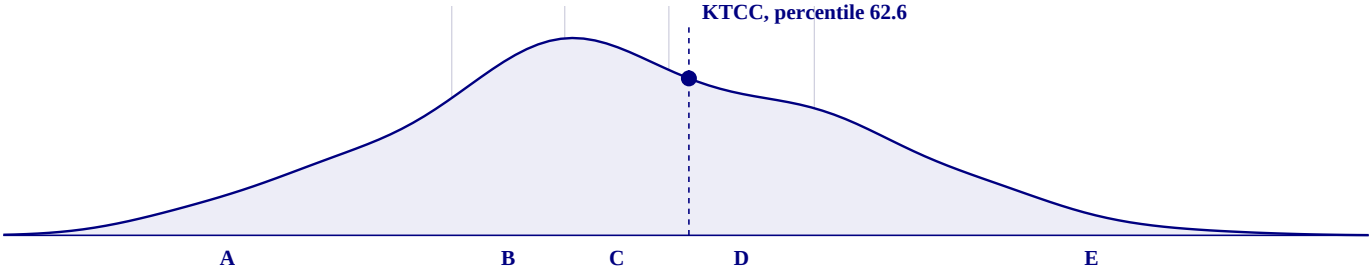
Warnings

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

Check	Measured
Short runway	cash runway is 3.7 months

Among 469 peers

business equipment; 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
289	NXP Semiconductors N.V. (NXPI)	61.5	C/D	
290	Fastly, Inc. (FSLY)	61.8	C/D	
291	Harmonic Inc. (HLIT)	62.0	C/D	late filer, fortress balance sheet
292	Bentley Systems Inc. (BSY)	62.2	C/D	
293	TripAdvisor, Inc. (TRIP)	62.4	D	fortress balance sheet
294	KEY Tronic Corp. (KTCC)	62.6	D	short runway
295	Cisco Systems, Inc. (CSCO)	62.8	D	
296	Alpha & Omega Semiconductor Ltd. (AOSL)	63.0	D	fortress balance sheet
297	ON Semiconductor Corp. (ON)	63.2	D	
298	Teradata Corp. (TDC)	63.5	D	
299	Caci International Inc. (CACI)	63.7	D	

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What the price implies

at the 2026-11-20 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(41.6%)	(2.2%)	19
Distance from 52-week high	(72.7%)	(41.7%)	18
EBIT to enterprise value	(12.3%)	2.0%	15
Free cash flow yield	(14.9%)	3.1%	15
Book value to price	4.79	0.31	97
Sales to price	29.99	0.35	99
Composite equity issuance, five years	2.8%	4.3%	47
Relative strength against the sector, log excess return	(0.81)	(0.29)	19
Twelve-month failure probability, CHS model	not computable	0.05%	

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 2 of 9, period end 2026-06-27	
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	fail
Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$1.6M
Operating cash flow, four quarters	-$5.3M
Months of runway	3.7
Days since last periodic filing	12 (10-Q received Nov 9, 2026)
Median daily dollar volume, 63 sessions	$39,394

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	$23.9M	2026-06-27	2026-09-24	10-K	26-000033
2	assets	us-gaap:Assets	$299.8M	2026-06-27	2026-09-24	10-K	26-000033
3	operating income	us-gaap:OperatingIncomeLoss	-$14.7M	2026-06-27	2026-09-24	10-K	26-000033
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$24.8M	2026-06-27	2026-09-24	10-K	26-000033
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$23.0M	2026-06-27	2026-09-24	10-K	26-000033
6	total debt	us-gaap:LongTermDebt	$106.2M	2026-06-27	2026-09-24	10-K	26-000033
7	book equity	us-gaap:StockholdersEquity	$69.2M	2026-06-27	2026-09-24	10-K	26-000033
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$584,000	2026-06-27	2026-09-24	10-K	26-000033
9	total debt	us-gaap:LongTermDebt	$105.2M	2025-06-28	2025-09-17	10-K	25-000086
10	book equity	us-gaap:StockholdersEquity	$117.1M	2025-06-28	2026-09-24	10-K	26-000033
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$1.4M	2025-06-28	2026-09-24	10-K	26-000033
12	net income	us-gaap:NetIncomeLoss	-$47.8M	2026-06-27	2026-09-24	10-K	26-000033
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$4.4M	2026-06-27	2026-09-24	10-K	26-000033
14	assets	us-gaap:Assets	$315.9M	2025-06-28	2026-09-24	10-K	26-000033
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$386.7M	2026-06-27	2026-09-24	10-K	26-000033
16	gross profit	us-gaap:GrossProfit	$36.4M	2025-06-28	2026-09-24	10-K	26-000033
17	revenue	us-gaap:Revenues	$467.9M	2025-06-28	2025-09-17	10-K	25-000086

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18	gross profit	us-gaap:GrossProfit	$39.9M	2024-06-29	2025-09-17	10-K	25-000086
19	revenue	us-gaap:Revenues	$566.9M	2024-06-29	2025-09-17	10-K	25-000086
20	gross profit	us-gaap:GrossProfit	$47.5M	2023-07-01	2024-10-15	10-K	24-000113
21	revenue	us-gaap:Revenues	$605.3M	2023-07-01	2024-10-15	10-K	24-000113
22	gross profit	us-gaap:GrossProfit	$43.2M	2022-07-02	2024-10-15	10-K	24-000113
23	revenue	us-gaap:Revenues	$544.2M	2022-07-02	2024-10-15	10-K	24-000113
24	current assets	us-gaap:AssetsCurrent	$223.8M	2026-06-27	2026-09-24	10-K	26-000033
25	current liabilities	us-gaap:LiabilitiesCurrent	$106.5M	2026-06-27	2026-09-24	10-K	26-000033
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$20.8M	2026-06-27	2026-09-24	10-K	26-000033
27	liabilities	us-gaap:Liabilities	$230.6M	2026-06-27	2026-09-24	10-K	26-000033
28	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$10.2M	2026-06-27	2026-09-24	10-K	26-000033
29	operating income	us-gaap:OperatingIncomeLoss	$16.3M	2023-07-01	2024-10-15	10-K	24-000113
30	interest expense	us-gaap:InterestExpense	$10.0M	2023-07-01	2023-09-26	10-K	23-000032
31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$6.4M	2026-06-27	2026-09-24	10-K	26-000033
32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$18.9M	2025-06-28	2026-09-24	10-K	26-000033
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$4.1M	2025-06-28	2026-09-24	10-K	26-000033
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$13.8M	2024-06-29	2025-09-17	10-K	25-000086
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$4.0M	2024-06-29	2025-09-17	10-K	25-000086
36	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$11.3M	2023-07-01	2024-10-15	10-K	24-000113
37	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$9.8M	2023-07-01	2024-10-15	10-K	24-000113
38	current assets	us-gaap:AssetsCurrent	$234.2M	2025-06-28	2026-09-24	10-K	26-000033
39	current liabilities	us-gaap:LiabilitiesCurrent	$92.0M	2025-06-28	2026-09-24	10-K	26-000033
40	assets	us-gaap:Assets	$355.3M	2024-06-29	2025-09-17	10-K	25-000086
41	assets	us-gaap:Assets	$370.1M	2024-03-30	2024-10-15	10-K	24-000113
42	shares outstanding	dei:EntityCommonStockSharesOutstanding	11,065,887	2026-09-21	2026-09-24	10-K	26-000033
43	shares outstanding	dei:EntityCommonStockSharesOutstanding	10,773,774	2025-09-08	2025-09-17	10-K	25-000086

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