Sturm Ruger & Co. Inc.

RGR

NYSE; manufacturing; SIC 3480, Ordnance & Accessories, (No Vehicles/Guided Missiles); CIK 0000095029

B

second fifth of 246 graded peers in manufacturing

rank 73 of 246; percentile 29.4; sampling error 3.0 points; lower is stronger

A B C D E

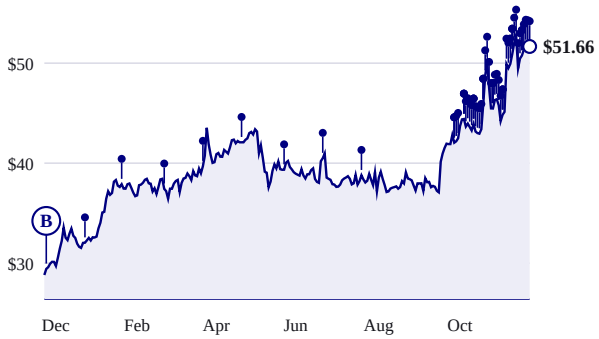
B, the elk



Scoreboard

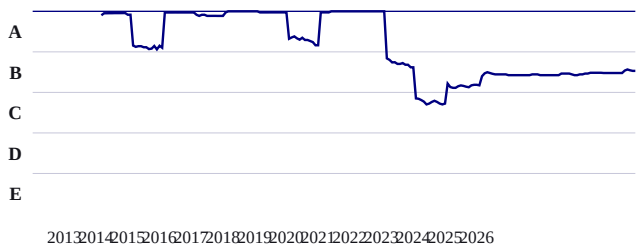
Profitability	C percentile 47.8
Solvency	A percentile 16.6
Growth and financing	D percentile 63.7
Reliability	0.87 AUC filers with $120M to $591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025
Peer failure rate	1.03% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$120M to $591M assets total assets $342.0M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress, fortress balance sheet
Inputs computable	8 of 13
Graded from	filings received through Mar 2, 2026 264 days before the rescan; latest periodic filing 10-Q received Nov 4, 2026
Last close	$51.61 2026-11-20; market equity $824.6M; 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 2, 2026

(the "Company") is principally engaged in the design, manufacture, and sale of firearms to domestic customers. Virtually all of the Company's sales for the year ended December 31, 2025 were from the firearms segment, with less than 1% from the castings segment. Export sales represent approximately 5% of firearms sales. The Company's design and manufacturing operations are located in the United States and almost all product content is domestic. incorporated in its present form under the laws of Delaware in 1969. The Company primarily offers products in four industry product categories - rifles, pistols, shotguns, and revolvers.

The thirteen inputs

lower percentile is stronger; sleeves and inputs within a sleeve carry equal weight

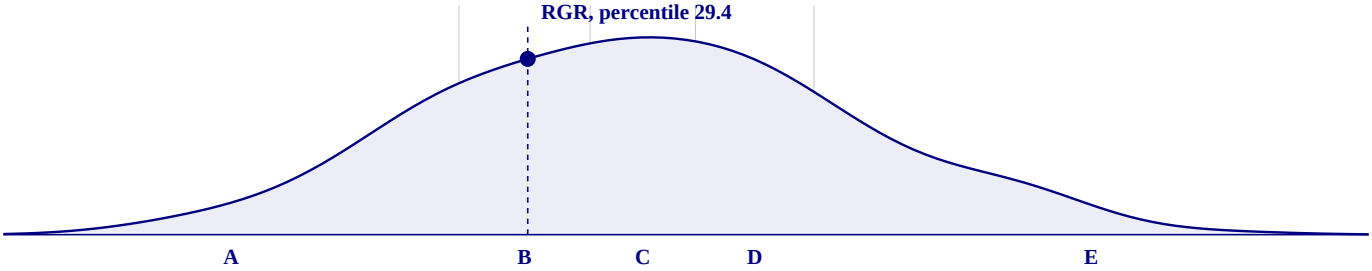
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 47.8						
Gross profitability	23.7%	22.3%		40.2	267	2025-12-31
Return on invested capital	not computable	9.9%				
one or more required annual facts are missing						

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Accruals ratio	(16.2%)	(3.7%)	10.5	288	2025-12-31
Gross margin stability, five years	7.9 pts	2.1 pts	92.8	222	2025-12-31
Solvency, sleeve percentile 16.6					
Altman Z double-prime	not computable	3.74			
one or more required annual facts are missing					
Net debt to EBITDA	not computable	1.75x			
one or more required annual facts are missing					
Interest coverage	not computable	5.13x			
latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31					
Current ratio	3.87x	2.30x	16.6	302	2025-12-31
Growth and financing, sleeve percentile 63.7					
Revenue growth, three-year compound	(2.9%)	2.3%	74.2	261	2025-12-31
Free cash flow growth, three-year compound	(8.1%)	13.5%	82.6	139	2025-12-31
Reinvestment rate	not computable	24.5%			
NOPAT must exceed $100,000					
Asset growth, three years	(11.0%)	4.2%	91.7	265	2025-12-31
Net share issuance, one year	(4.9%)	(0.04%)	6.3	240	2026-02-10

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
68	Xylem Inc. (XYL)	27.3	B	
69	Armstrong World Industries Inc. (AWI)	27.8	B	
70	Janus International Group, Inc. (JBI)	28.2	B	
71	Zurn Elkay Water Solutions Corp. (ZWS)	28.6	B	
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

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	1.3%	10.0%	40
Distance from 52-week high	(2.2%)	(32.1%)	100
EBIT to enterprise value	not computable	4.5%	
Free cash flow yield	4.7%	3.8%	62
Book value to price	0.36	0.39	45
Sales to price	0.66	0.60	56

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Composite equity issuance, five years	(33.7%)	(9.5%)	9
Relative strength against the sector, log excess return	(0.07)	0.01	40
Twelve-month failure probability, CHS model	not computable	0.04%	

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score None 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	pass
Cash, filings, liquidity	
Cash and equivalents	$24.2M
Operating cash flow, four quarters	$39.8M
Months of runway	not finite
Days since last periodic filing	17 (10-Q received Nov 4, 2026)
Median daily dollar volume, 63 sessions	$12.3M

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	$81.2M	2025-12-31	2026-03-02	10-K	26-000243
2	assets	us-gaap:Assets	$342.0M	2025-12-31	2026-03-02	10-K	26-000243
3	net income	us-gaap:NetIncomeLoss	-$4.4M	2025-12-31	2026-03-02	10-K	26-000243
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$54.3M	2025-12-31	2026-03-02	10-K	26-000243
5	assets	us-gaap:Assets	$384.0M	2024-12-31	2026-03-02	10-K	26-000243
6	revenue	us-gaap:Revenues	$546.1M	2025-12-31	2026-03-02	10-K	26-000243
7	gross profit	us-gaap:GrossProfit	$114.4M	2024-12-31	2026-03-02	10-K	26-000243
8	revenue	us-gaap:Revenues	$535.6M	2024-12-31	2026-03-02	10-K	26-000243
9	gross profit	us-gaap:GrossProfit	$133.6M	2023-12-31	2026-03-02	10-K	26-000243
10	revenue	us-gaap:Revenues	$543.8M	2023-12-31	2026-03-02	10-K	26-000243
11	gross profit	us-gaap:GrossProfit	$180.1M	2022-12-31	2025-02-19	10-K	25-000197
12	revenue	us-gaap:Revenues	$595.8M	2022-12-31	2025-02-19	10-K	25-000197
13	gross profit	us-gaap:GrossProfit	$279.6M	2021-12-31	2024-02-21	10-K	24-000243
14	revenue	us-gaap:Revenues	$730.7M	2021-12-31	2024-02-21	10-K	24-000243
15	operating income	us-gaap:OperatingIncomeLoss	$52.1M	2023-12-31	2026-03-02	10-K	26-000243
16	interest expense	us-gaap:InterestExpense	$205,000	2023-12-31	2024-02-21	10-K	24-000243
17	current assets	us-gaap:AssetsCurrent	$211.6M	2025-12-31	2026-03-02	10-K	26-000243
18	current liabilities	us-gaap:LiabilitiesCurrent	$54.7M	2025-12-31	2026-03-02	10-K	26-000243
19	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$15.8M	2025-12-31	2026-03-02	10-K	26-000243
20	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$55.5M	2024-12-31	2026-03-02	10-K	26-000243
21	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$20.8M	2024-12-31	2026-03-02	10-K	26-000243
22	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$33.9M	2023-12-31	2026-03-02	10-K	26-000243
23	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$15.8M	2023-12-31	2026-03-02	10-K	26-000243
24	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$77.2M	2022-12-31	2025-02-19	10-K	25-000197
25	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$27.7M	2022-12-31	2025-02-19	10-K	25-000197
26	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$22.9M	2025-12-31	2026-03-02	10-K	26-000243
27	operating income	us-gaap:OperatingIncomeLoss	-$12.3M	2025-12-31	2026-03-02	10-K	26-000243

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28	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$7.2M	2025-12-31	2026-03-02	10-K	26-000243
29	income tax	us-gaap:IncomeTaxExpenseBenefit	-$2.8M	2025-12-31	2026-03-02	10-K	26-000243
30	current assets	us-gaap:AssetsCurrent	$258.4M	2024-12-31	2026-03-02	10-K	26-000243
31	current liabilities	us-gaap:LiabilitiesCurrent	$60.8M	2024-12-31	2026-03-02	10-K	26-000243
32	assets	us-gaap:Assets	$398.8M	2023-12-31	2025-02-19	10-K	25-000197
33	assets	us-gaap:Assets	$484.8M	2022-12-31	2025-02-19	10-K	25-000197
34	shares outstanding	dei:EntityCommonStockSharesOutstanding	15,944,300	2026-02-10	2026-03-02	10-K	26-000243
35	shares outstanding	dei:EntityCommonStockSharesOutstanding	16,762,100	2025-02-10	2025-02-19	10-K	25-000197

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