Team Inc.

TISI

NYSE; shops; SIC 7600, Services-Miscellaneous Repair Services; CIK 0000318833

D

fourth fifth of 239 graded peers in shops

rank 174 of 239; percentile 72.7; sampling error 3.0 points; lower is stronger

A B C D E

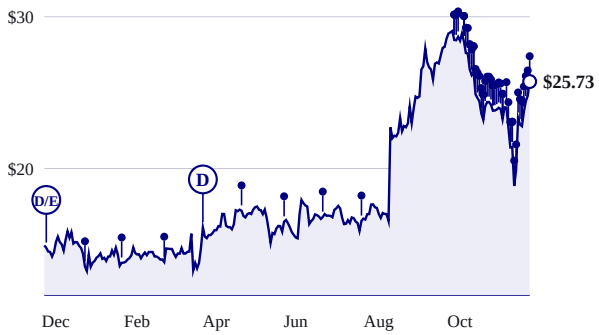
D, the sloth



Scoreboard

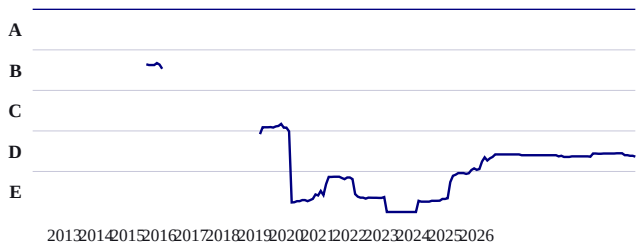
Profitability	C percentile 43.3
Solvency	D percentile 64.7
Growth and financing	D percentile 69.6
Reliability	0.87 AUC filers with $120M to $591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025
Peer failure rate	1.03% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$120M to $591M assets total assets $485.5M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress
Inputs computable	9 of 13
Graded from	filings received through Mar 12, 2026 254 days before the rescan; latest periodic filing 10-Q received Nov 12, 2026
Last close	$25.53 2026-11-20; market equity $117.7M; 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 12, 2026

Introduction. Unless otherwise indicated, the terms "Team," "the Company," "we," "our" and "us" are used in this report to refer to either Team, Inc., to one or more of our consolidated subsidiaries, or to all of them taken as a whole. Our stock is traded on the NYSE under the symbol "TISI". We are a global, leading provider of specialty industrial services offering customers access to a full suite of conventional, specialized, and proprietary mechanical, heat-treating, and inspection services.

The thirteen inputs

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

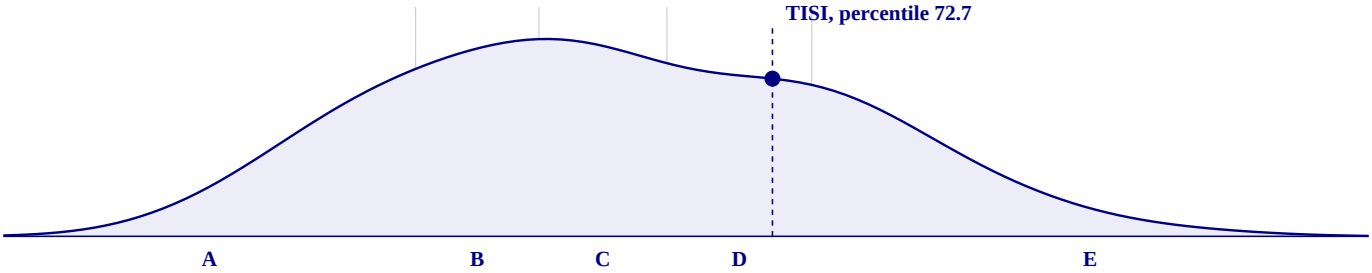
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 43.3						
Gross profitability	47.7%	43.5%		42.3	223	2025-12-31
Return on invested capital	not computable	11.5%				
pretax income must exceed the validity floor and imply a 0%-100% tax rate						
Accruals ratio	(7.5%)	(4.9%)		34.8	268	2025-12-31

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Gross margin stability, five years	1.4 pts	1.2 pts	52.7	202	2025-12-31
Solvency, sleeve percentile 64.7					
Altman Z double-prime	(1.01)	1.93	74.5	197	2025-12-31
Net debt to EBITDA	5.72x	1.65x	96.7	91	2025-12-31
Interest coverage	not computable	3.83x			
one or more required annual facts are missing					
Current ratio	2.22x	1.34x	23.1	274	2025-12-31
Growth and financing, sleeve percentile 69.6					
Revenue growth, three-year compound	2.2%	1.8%	47.8	250	2025-12-31
Free cash flow growth, three-year compound	not computable	5.2%			
current FCF must be positive and base FCF must exceed $100,000					
Reinvestment rate	not computable	13.1%			
pretax income must exceed the validity floor and imply a 0%-100% tax rate					
Asset growth, three years	(7.7%)	3.3%	80.4	251	2025-12-31
Net share issuance, one year	1.7%	(0.6%)	80.5	206	2026-03-10

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
169	OneWater Marine Inc. (ONEW)	70.6	D	
170	Builders FirstSource, Inc. (BLDR)	71.0	D	
171	Wendy's Co. (WEN)	71.4	D	
172	Marinemax Inc. (HZO)	71.8	D	
173	HF Foods Group Inc. (HFFG)	72.3	D	
174	Team Inc. (TISI)	72.7	D	
175	Target Corp. (TGT)	73.1	D	
176	Ingram Micro Holding Corp. (INGM)	73.5	D	
177	Lands' END, Inc. (LE)	73.9	D	short runway
178	Sherwin Williams Co. (SHW)	74.4	D	
179	El Pollo Loco Holdings, Inc. (LOCO)	74.8	D	

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	85.0%	(0.5%)	95
Distance from 52-week high	(11.5%)	(25.1%)	81
EBIT to enterprise value	3.3%	5.5%	29
Free cash flow yield	(17.4%)	4.2%	9
Book value to price	(0.54)	0.40	4
Sales to price	7.56	1.70	88
Composite equity issuance, five years	40.1%	(17.2%)	94
Relative strength against the sector, log excess return	0.70	0.08	95

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Twelve-month failure probability, CHS model	not computable	0.04%

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 4 of 9, period end 2025-12-31	
Return on assets above zero	fail
Operating cash flow above zero	fail
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	fail
Gross margin improved	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$11.0M
Operating cash flow, four quarters	$5.1M
Months of runway	not finite
Days since last periodic filing	9 (10-Q received Nov 12, 2026)
Median daily dollar volume, 63 sessions	$708,593

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	$231.7M	2025-12-31	2026-03-12	10-K	26-000007
2	assets	us-gaap:Assets	$485.5M	2025-12-31	2026-03-12	10-K	26-000007
3	operating income	us-gaap:OperatingIncomeLoss	$14.1M	2025-12-31	2026-03-12	10-K	26-000007
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$46.6M	2025-12-31	2026-03-12	10-K	26-000007
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$2.6M	2025-12-31	2026-03-12	10-K	26-000007
6	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$293.3M	2025-12-31	2026-03-12	10-K	26-000007
7	book equity	us-gaap:StockholdersEquity	-$24.5M	2025-12-31	2026-03-12	10-K	26-000007
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$18.1M	2025-12-31	2026-03-12	10-K	26-000007
9	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$318.6M	2024-12-31	2026-03-12	10-K	26-000007
10	book equity	us-gaap:StockholdersEquity	$1.7M	2024-12-31	2026-03-12	10-K	26-000007
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$35.5M	2024-12-31	2026-03-12	10-K	26-000007
12	net income	us-gaap:NetIncomeLoss	-$49.2M	2025-12-31	2026-03-12	10-K	26-000007
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$11.3M	2025-12-31	2026-03-12	10-K	26-000007
14	assets	us-gaap:Assets	$528.4M	2024-12-31	2026-03-12	10-K	26-000007
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$896.5M	2025-12-31	2026-03-12	10-K	26-000007
16	gross profit	us-gaap:GrossProfit	$223.2M	2024-12-31	2026-03-12	10-K	26-000007
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$852.3M	2024-12-31	2026-03-12	10-K	26-000007
18	gross profit	us-gaap:GrossProfit	$211.2M	2023-12-31	2025-03-19	10-K	25-000015
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$862.6M	2023-12-31	2025-03-19	10-K	25-000015
20	gross profit	us-gaap:GrossProfit	$201.6M	2022-12-31	2024-03-07	10-K	24-000005
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$840.2M	2022-12-31	2024-03-07	10-K	24-000005
22	gross profit	us-gaap:GrossProfit	$177.7M	2021-12-31	2023-03-14	10-K	23-000005
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$794.2M	2021-12-31	2023-03-14	10-K	23-000005
24	current assets	us-gaap:AssetsCurrent	$266.4M	2025-12-31	2026-03-12	10-K	26-000007
25	current liabilities	us-gaap:LiabilitiesCurrent	$120.1M	2025-12-31	2026-03-12	10-K	26-000007
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$464.9M	2025-12-31	2026-03-12	10-K	26-000007
27	liabilities	us-gaap:Liabilities	$458.0M	2025-12-31	2026-03-12	10-K	26-000007
28	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$34.1M	2025-12-31	2026-03-12	10-K	26-000007
29	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$9.3M	2025-12-31	2026-03-12	10-K	26-000007
30	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$22.8M	2024-12-31	2026-03-12	10-K	26-000007

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31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$9.5M	2024-12-31	2026-03-12	10-K	26-000007
32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$11.0M	2023-12-31	2025-03-19	10-K	25-000015
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$10.4M	2023-12-31	2025-03-19	10-K	25-000015
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$57.9M	2022-12-31	2024-03-07	10-K	24-000005
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$24.7M	2022-12-31	2024-03-07	10-K	24-000005
36	current assets	us-gaap:AssetsCurrent	$305.1M	2024-12-31	2026-03-12	10-K	26-000007
37	current liabilities	us-gaap:LiabilitiesCurrent	$171.2M	2024-12-31	2026-03-12	10-K	26-000007
38	assets	us-gaap:Assets	$565.7M	2023-12-31	2025-03-19	10-K	25-000015
39	assets	us-gaap:Assets	$616.6M	2022-12-31	2024-03-07	10-K	24-000005
40	shares outstanding	dei:EntityCommonStockSharesOutstanding	4,571,382	2026-03-10	2026-03-12	10-K	26-000007
41	shares outstanding	dei:EntityCommonStockSharesOutstanding	4,493,391	2025-03-17	2025-03-19	10-K	25-000015

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