Verra Mobility Corp.

VRRM

Nasdaq; other; SIC 4700, Transportation Services; CIK 0001682745

B

second fifth of 315 graded peers in other

rank 109 of 315; percentile 34.4; sampling error 2.7 points; lower is stronger

A B C D E

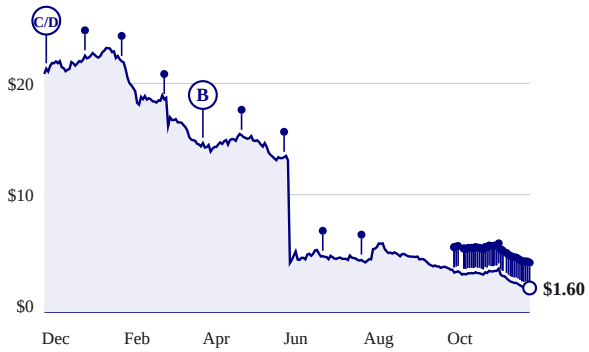
B, the elk



Scoreboard

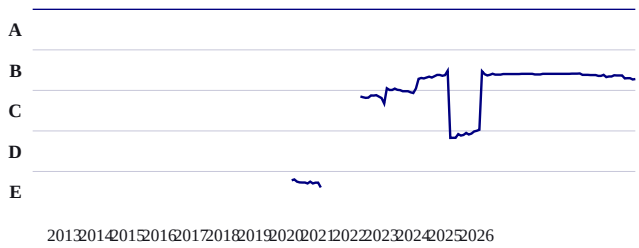
Profitability	B/C percentile 37.8
Solvency	C percentile 45.3
Growth and financing	C percentile 47.0
Reliability	0.91 AUC filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025
Peer failure rate	1.01% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$591M to $2.67B assets total assets $1.6B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress
Inputs computable	10 of 13
Graded from	filings received through Feb 24, 2026 270 days before the rescan; latest periodic filing 10-Q received Oct 30, 2026
Last close	$1.58 2026-11-20; market equity $240.9M; 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 Feb 24, 2026

We are a leading provider of smart mobility technology solutions, principally operating throughout the United States, Australia, Europe, and Canada. Our goal is to make transportation safer, smarter, and more connected through our integrated, data-driven solutions, including toll and violations management, title and registration services, automated safety and traffic enforcement, and commercial parking management.

The thirteen inputs

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

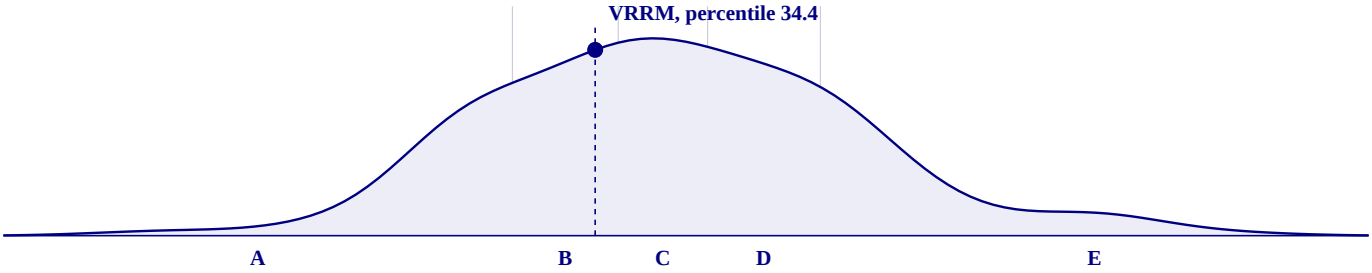
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 37.8						
Gross profitability	not computable	26.7%				
one or more required annual facts are missing						
Return on invested capital	13.5%	10.0%		35.6	147	2025-12-31
Accruals ratio	(7.3%)	(5.7%)		40.0	458	2025-12-31

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Gross margin stability, five years	not computable	2.2 pts			
five annual gross margins are required; found 0					
Solvency, sleeve percentile 45.3					
Altman Z double-prime	1.64	2.06	48.6	357	2025-12-31
Net debt to EBITDA	2.73x	2.37x	59.9	173	2025-12-31
Interest coverage	not computable	2.93x			
latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31					
Current ratio	2.09x	1.33x	27.5	462	2025-12-31
Growth and financing, sleeve percentile 47.0					
Revenue growth, three-year compound	9.7%	4.9%	31.7	376	2025-12-31
Free cash flow growth, three-year compound	(7.0%)	8.7%	69.3	213	2025-12-31
Reinvestment rate	24.7%	13.3%	45.2	187	2025-12-31
Asset growth, three years	(2.1%)	4.1%	75.8	402	2025-12-31
Net share issuance, one year	(5.2%)	(0.5%)	13.0	354	2026-02-28

Among 315 peers

other; 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
104	Quanta Services, Inc. (PWR)	32.8	B	
105	Xometry, Inc. (XMTR)	33.1	B	
106	Brinks Co. (BCO)	33.4	B	
107	Fedex Corp. (FDX)	33.8	B	
108	Paysign, Inc. (PAYS)	34.1	B	
109	Verra Mobility Corp. (VRRM)	34.4	B	
110	Broadridge Financial Solutions, Inc. (BR)	34.7	B	
111	Sterling Infrastructure, Inc. (STRL)	35.0	B	
112	Tetra Tech Inc. (TTEK)	35.4	B	
113	Evolent Health, Inc. (EVH)	35.7	B	
114	United Rentals, Inc. (URI)	36.0	B	

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	(86.6%)	0.4%	3
Distance from 52-week high	(93.1%)	(28.8%)	3
EBIT to enterprise value	20.9%	4.6%	97
Free cash flow yield	56.2%	4.1%	98
Book value to price	1.09	0.39	86
Sales to price	4.03	0.75	88
Composite equity issuance, five years	(6.5%)	(9.5%)	57
Relative strength against the sector, log excess return	(2.14)	(0.12)	3
Twelve-month failure probability, CHS model	not computable	0.04%	

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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	pass
Operating cash flow above zero	pass
Return on assets improved	pass
Operating cash flow exceeds net income	pass
Long-term leverage fell	fail
Current ratio improved	pass
No new shares issued	pass
Gross margin improved	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$137.0M
Operating cash flow, four quarters	$251.7M
Months of runway	not finite
Days since last periodic filing	22 (10-Q received Oct 30, 2026)
Median daily dollar volume, 63 sessions	$13.7M

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	operating income	us-gaap:OperatingIncomeLoss	$238.4M	2025-12-31	2026-02-24	10-K	26-067293
2	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$195.0M	2025-12-31	2026-02-24	10-K	26-067293
3	income tax	us-gaap:IncomeTaxExpenseBenefit	$58.3M	2025-12-31	2026-02-24	10-K	26-067293
4	total debt	us-gaap:LongTermDebt	$1.0B	2025-12-31	2026-02-24	10-K	26-067293
5	book equity	us-gaap:StockholdersEquity	$293.0M	2025-12-31	2026-02-24	10-K	26-067293
6	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$65.3M	2025-12-31	2026-02-24	10-K	26-067293
7	total debt	us-gaap:LongTermDebt	$1.0B	2024-12-31	2026-02-24	10-K	26-067293
8	book equity	us-gaap:StockholdersEquity	$265.1M	2024-12-31	2026-02-24	10-K	26-067293
9	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$77.6M	2024-12-31	2026-02-24	10-K	26-067293
10	net income	us-gaap:NetIncomeLoss	$136.6M	2025-12-31	2026-02-24	10-K	26-067293
11	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$255.8M	2025-12-31	2026-02-24	10-K	26-067293
12	assets	us-gaap:Assets	$1.6B	2025-12-31	2026-02-24	10-K	26-067293
13	assets	us-gaap:Assets	$1.6B	2024-12-31	2026-02-24	10-K	26-067293
14	current assets	us-gaap:AssetsCurrent	$440.9M	2025-12-31	2026-02-24	10-K	26-067293
15	current liabilities	us-gaap:LiabilitiesCurrent	$210.5M	2025-12-31	2026-02-24	10-K	26-067293
16	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$243.8M	2025-12-31	2026-02-24	10-K	26-067293
17	liabilities	us-gaap:Liabilities	$1.4B	2025-12-31	2026-02-24	10-K	26-067293
18	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$114.1M	2025-12-31	2026-02-24	10-K	26-067293
19	operating income	us-gaap:OperatingIncomeLoss	$188.8M	2023-12-31	2026-02-24	10-K	26-067293
20	interest expense	us-gaap:InterestExpense	$86.7M	2023-12-31	2024-02-29	10-K	24-023271
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$979.1M	2025-12-31	2026-02-24	10-K	26-067293
22	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$879.2M	2024-12-31	2026-02-24	10-K	26-067293
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$817.3M	2023-12-31	2026-02-24	10-K	26-067293
24	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$741.6M	2022-12-31	2025-02-27	10-K	25-029180
25	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$119.1M	2025-12-31	2026-02-24	10-K	26-067293
26	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$223.6M	2024-12-31	2026-02-24	10-K	26-067293
27	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$70.9M	2024-12-31	2026-02-24	10-K	26-067293
28	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$206.1M	2023-12-31	2026-02-24	10-K	26-067293
29	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$57.0M	2023-12-31	2026-02-24	10-K	26-067293
30	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$218.3M	2022-12-31	2025-02-27	10-K	25-029180
31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$48.2M	2022-12-31	2025-02-27	10-K	25-029180

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32	current assets	us-gaap:AssetsCurrent	$394.0M	2024-12-31	2026-02-24	10-K	26-067293
33	current liabilities	us-gaap:LiabilitiesCurrent	$199.7M	2024-12-31	2026-02-24	10-K	26-067293
34	assets	us-gaap:Assets	$1.8B	2023-12-31	2025-02-27	10-K	25-029180
35	assets	us-gaap:Assets	$1.8B	2022-12-31	2024-02-29	10-K	24-023271
36	shares outstanding	dei:EntityCommonStockSharesOutstanding	151,361,959	2026-02-28	2026-02-24	10-K	26-067293
37	shares outstanding	dei:EntityCommonStockSharesOutstanding	159,593,852	2025-02-28	2025-02-27	10-K	25-029180

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