Kforce Inc.

KFRC

NYSE; other; SIC 7363, Services-Help Supply Services; CIK 0000930420

A

strongest fifth of 315 graded peers in other

rank 38 of 315; percentile 11.8; sampling error 2.7 points; lower is stronger

A B C D E

A, the bull



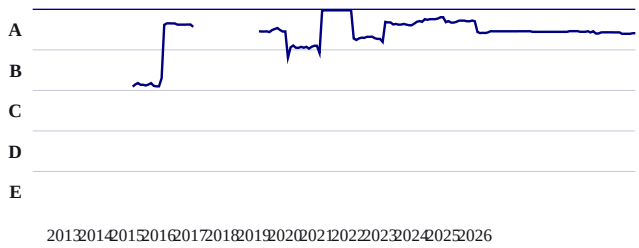
Scoreboard	
Profitability	A/B percentile 18.6
Solvency	A/B percentile 19.6
Growth and financing	D percentile 66.9
Reliability	0.87 AUC filers with $120M to $591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025
Peer failure rate	1.03% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$120M to $591M assets total assets $365.6M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress, fortress balance sheet
Inputs computable	10 of 13
Graded from	filings received through Feb 20, 2026 275 days before the rescan; latest periodic filing 10-Q received Oct 28, 2026
Last close	$54.54 2026-11-20; market equity $976.7M; 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 Feb 20, 2026

Kforce Inc., along with its subsidiaries (collectively, "Kforce"), is a solutions firm specializing in technology, finance and accounting, and other professional staffing services. Through our KNOWLEDGEforce®, we help industry-leading companies realize their digital transformation initiatives. We assemble and deploy teams of skilled technical experts who design and deliver solutions tailored to the unique requirements of each client. These scalable and flexible solutions are shaped by our deep market insight, thought leadership and broad experience across multiple industries.

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 18.6						
Gross profitability	98.8%	26.7%		1.9	265	2025-12-31
Return on invested capital	not computable	10.0%				
one or more required annual facts are missing						

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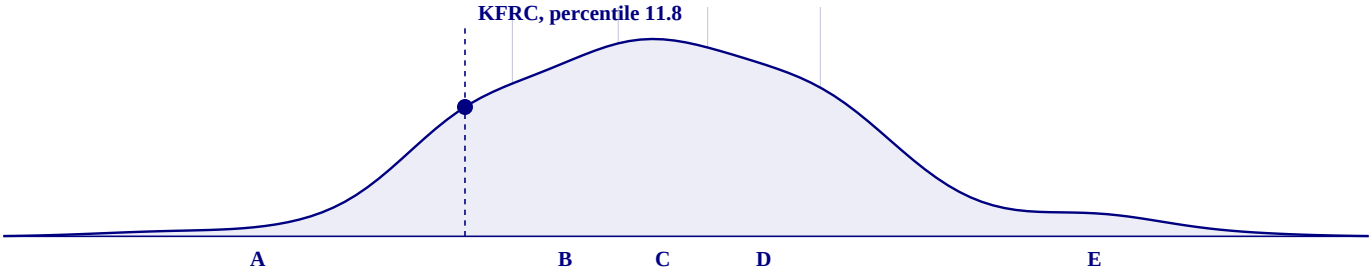
Accruals ratio	(7.4%)	(5.7%)	39.4	458	2025-12-31
Gross margin stability, five years	0.8 pts	2.2 pts	14.4	195	2025-12-31
Solvency, sleeve percentile 19.6					
Altman Z double-prime	7.97	2.06	6.5	357	2025-12-31
Net debt to EBITDA	not computable	2.37x			
one or more required annual facts are missing					
Interest coverage	not computable	2.93x			
latest aligned inputs end 2015-12-31; latest annual assets end 2025-12-31					
Current ratio	1.78x	1.33x	32.8	462	2025-12-31
Growth and financing, sleeve percentile 66.9					
Revenue growth, three-year compound	(8.1%)	4.9%	85.6	376	2025-12-31
Free cash flow growth, three-year compound	(17.3%)	8.7%	79.7	213	2025-12-31
Reinvestment rate	(40.7%)	13.3%	75.8	187	2025-12-31
Asset growth, three years	(2.3%)	4.1%	76.3	402	2025-12-31
Net share issuance, one year	(4.4%)	(0.5%)	17.0	354	2026-02-13

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
33	Genpact Ltd. (G)	10.2	A	
34	Mercadolibre Inc. (MELI)	10.5	A	
35	Hackett Group, Inc. (HCKT)	10.8	A	fortress balance sheet
36	Mastech Digital, Inc. (MHH)	11.1	A	
37	Hecla Mining (HL)	11.5	A	
38	Kforce Inc. (KFRC)	11.8	A	
39	Willdan Group, Inc. (WLDN)	12.1	A	fortress balance sheet
40	UL Solutions Inc. (ULS)	12.4	A	
41	OLD Dominion Freight Line, Inc. (ODFL)	12.7	A	fortress balance sheet
42	Gartner Inc. (IT)	13.1	A	
43	Saia Inc. (SAIA)	13.4	A	

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	116.6%	0.4%	97
Distance from 52-week high	(9.8%)	(28.8%)	83
EBIT to enterprise value	not computable	4.6%	
Free cash flow yield	4.8%	4.1%	55
Book value to price	0.14	0.39	22
Sales to price	1.36	0.75	67
Composite equity issuance, five years	(36.6%)	(9.5%)	10
Relative strength against the sector, log excess return	0.65	(0.12)	97

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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 None 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	fail
Current ratio improved	fail
No new shares issued	pass
Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$250,000
Operating cash flow, four quarters	$22.5M
Months of runway	not finite
Days since last periodic filing	25 (10-Q received Oct 28, 2026)
Median daily dollar volume, 63 sessions	$10.9M

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	$361.4M	2025-12-31	2026-02-20	10-K	26-000007
2	assets	us-gaap:Assets	$365.6M	2025-12-31	2026-02-20	10-K	26-000007
3	net income	us-gaap:NetIncomeLoss	$34.8M	2025-12-31	2026-02-20	10-K	26-000007
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$61.6M	2025-12-31	2026-02-20	10-K	26-000007
5	assets	us-gaap:Assets	$357.8M	2024-12-31	2026-02-20	10-K	26-000007
6	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.3B	2025-12-31	2026-02-20	10-K	26-000007
7	gross profit	us-gaap:GrossProfit	$385.4M	2024-12-31	2026-02-20	10-K	26-000007
8	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.4B	2024-12-31	2026-02-20	10-K	26-000007
9	gross profit	us-gaap:GrossProfit	$427.1M	2023-12-31	2026-02-20	10-K	26-000007
10	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.5B	2023-12-31	2026-02-20	10-K	26-000007
11	gross profit	us-gaap:GrossProfit	$501.1M	2022-12-31	2025-02-21	10-K	25-000022
12	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.7B	2022-12-31	2025-02-21	10-K	25-000022
13	gross profit	us-gaap:GrossProfit	$456.9M	2021-12-31	2024-02-23	10-K	24-000019
14	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.6B	2021-12-31	2024-02-23	10-K	24-000019
15	current assets	us-gaap:AssetsCurrent	$202.3M	2025-12-31	2026-02-20	10-K	26-000007
16	current liabilities	us-gaap:LiabilitiesCurrent	$113.7M	2025-12-31	2026-02-20	10-K	26-000007
17	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$552.2M	2025-12-31	2026-02-20	10-K	26-000007
18	operating income	us-gaap:OperatingIncomeLoss	$50.1M	2025-12-31	2026-02-20	10-K	26-000007
19	book equity	us-gaap:StockholdersEquity	$124.6M	2025-12-31	2026-02-20	10-K	26-000007
20	liabilities	us-gaap:Liabilities	$241.0M	2025-12-31	2026-02-20	10-K	26-000007
21	operating income	us-gaap:OperatingIncomeLoss	$74.2M	2015-12-31	2018-02-23	10-K	18-000047
22	interest expense	us-gaap:InterestExpense	$2.0M	2015-12-31	2016-02-26	10-K	16-000355
23	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$14.8M	2025-12-31	2026-02-20	10-K	26-000007
24	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$86.9M	2024-12-31	2026-02-20	10-K	26-000007
25	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$7.6M	2024-12-31	2026-02-20	10-K	26-000007
26	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$91.5M	2023-12-31	2026-02-20	10-K	26-000007
27	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$7.8M	2023-12-31	2026-02-20	10-K	26-000007
28	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$90.8M	2022-12-31	2025-02-21	10-K	25-000022
29	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$8.1M	2022-12-31	2025-02-21	10-K	25-000022
30	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$5.5M	2025-12-31	2026-02-20	10-K	26-000007

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31	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$46.9M	2025-12-31	2026-02-20	10-K	26-000007
32	income tax	us-gaap:IncomeTaxExpenseBenefit	$12.1M	2025-12-31	2026-02-20	10-K	26-000007
33	current assets	us-gaap:AssetsCurrent	$225.4M	2024-12-31	2026-02-20	10-K	26-000007
34	current liabilities	us-gaap:LiabilitiesCurrent	$112.5M	2024-12-31	2026-02-20	10-K	26-000007
35	assets	us-gaap:Assets	$358.0M	2023-12-31	2025-02-21	10-K	25-000022
36	assets	us-gaap:Assets	$392.0M	2022-12-31	2024-02-23	10-K	24-000019
37	shares outstanding	dei:EntityCommonStockSharesOutstanding	18,278,000	2026-02-13	2026-02-20	10-K	26-000007
38	shares outstanding	dei:EntityCommonStockSharesOutstanding	19,111,000	2025-02-14	2025-02-21	10-K	25-000022

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