Yunhong Green CTI Ltd.

YHGJ

Nasdaq; manufacturing; SIC 3060, Fabricated Rubber Products, NEC; CIK 0001042187

D

fourth fifth of 246 graded peers in manufacturing

rank 158 of 246; percentile 64.1; sampling error 3.0 points; lower is stronger

A B C D E

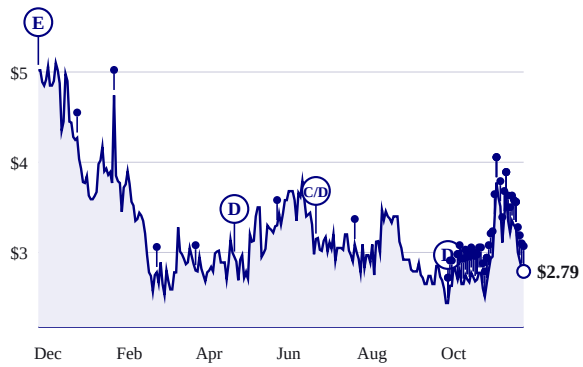
D, the sloth



Scoreboard

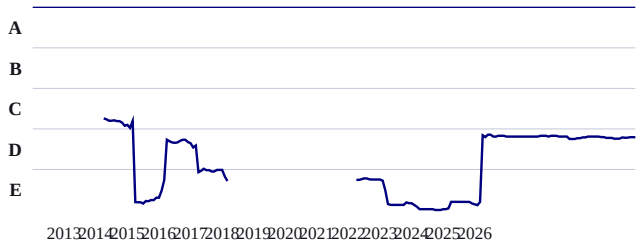
Profitability	B/C percentile 37.5
Solvency	D/E percentile 83.0
Growth and financing	B/C percentile 42.3
Reliability	0.83 AUC filers with $12.5M to $120M assets; 95% interval 0.79 to 0.86; 201 events, 2020 to 2025
Peer failure rate	1.07% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$12.5M to $120M assets total assets $22.5M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	short runway, late filer not computable: distress
Inputs computable	8 of 13
Graded from	filings received through Mar 23, 2026 244 days before the rescan; latest periodic filing 10-Q received Nov 13, 2026
Last close	$2.98 2026-11-20; market equity $7.8M; 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.

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 37.5						
Gross profitability	16.0%	22.3%		69.5	267	2025-12-31
Return on invested capital	not computable	9.9%				
prior invested-capital observation is 731 days earlier						
Accruals ratio	(9.8%)	(3.7%)		18.5	288	2025-12-31
Gross margin stability, five years	1.4 pts	2.1 pts		24.4	222	2025-12-31
Solvency, sleeve percentile 83.0						
Altman Z double-prime	(2.81)	3.74		87.8	223	2025-12-31
Net debt to EBITDA	not computable	1.75x				
EBITDA must exceed $100,000						
Interest coverage	not computable	5.13x				
latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31						

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Current ratio	1.41x	2.30x		78.1	302	2025-12-31
Growth and financing, sleeve percentile 42.3						
Revenue growth, three-year compound	3.0%	2.3%		46.5	261	2025-12-31
Free cash flow growth, three-year compound	not computable	13.5%				
current FCF must be positive and base FCF must exceed $100,000						
Reinvestment rate	not computable	24.5%				
pretax income must exceed the validity floor and imply a 0%-100% tax rate						
Asset growth, three years	13.7%	4.2%		19.3	265	2025-12-31
Net share issuance, one year	0.3%	(0.04%)		61.1	240	2026-03-23

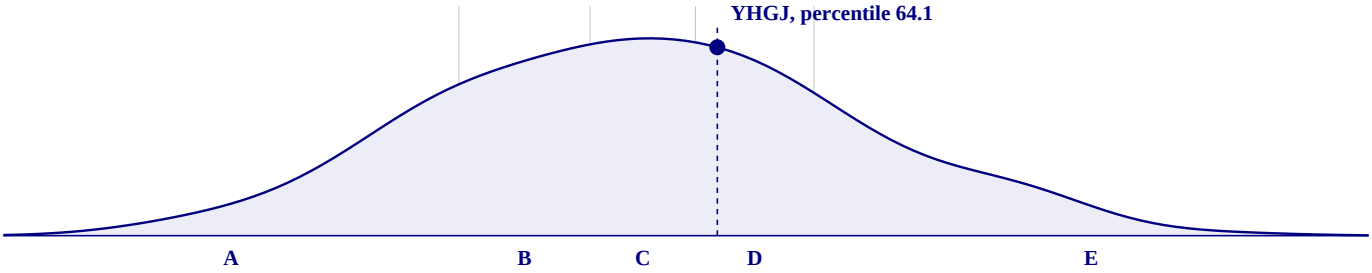
Warnings

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

Check	Measured
Short runway	cash runway is 5.7 months
Late filer	found 2 NT 10-K/Q filings in the last eight quarters

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
153	Sonoco Products Co. (SON)	62.0	C/D	
154	Tecogen Inc. (TGEN)	62.4	C/D	
155	Amtech Systems Inc. (ASYS)	62.9	C/D	fortress balance sheet
156	HNI Corp. (HNI)	63.3	D	dilution
157	Materion Corp. (MTRN)	63.7	D	
158	Yunhong Green CTI Ltd. (YHGJ)	64.1	D	short runway, late filer
159	Manitowoc Co. Inc. (MTW)	64.5	D	
160	Myers Industries Inc. (MYE)	64.9	D	
161	Helios Technologies, Inc. (HLIO)	65.3	D	
162	Chicago Rivet & Machine Co. (CVR)	65.7	D	short runway, fortress balance sheet
163	Park Ohio Holdings Corp. (PKOH)	66.1	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	(49.8%)	10.0%	5
Distance from 52-week high	(45.3%)	(32.1%)	30
EBIT to enterprise value	(14.5%)	4.5%	7
Free cash flow yield	(22.0%)	3.8%	8
Book value to price	0.95	0.39	83
Sales to price	2.71	0.60	88
Composite equity issuance, five years	148.9%	(9.5%)	97
Relative strength against the sector, log excess return	(0.77)	0.01	5

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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	fail
Operating cash flow above zero	fail
Return on assets improved	fail
Operating cash flow exceeds net income	pass
Long-term leverage fell	fail
Current ratio improved	pass
No new shares issued	fail
Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$111,000
Operating cash flow, four quarters	-$232,000
Months of runway	5.7
Days since last periodic filing	9 (10-Q received Nov 13, 2026)
Median daily dollar volume, 63 sessions	$8,636

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	$3.6M	2025-12-31	2026-03-23	10-K	26-012156
2	assets	us-gaap:Assets	$22.5M	2025-12-31	2026-03-23	10-K	26-012156
3	operating income	us-gaap:OperatingIncomeLoss	-$506,000	2021-12-31	2023-04-12	10-K	23-011960
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$7.7M	2021-12-31	2023-04-12	10-K	23-011960
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$0	2021-12-31	2022-04-15	10-K	22-009039
6	total debt	us-gaap:LongTermDebt	$6.9M	2021-12-31	2023-04-12	10-K	23-011960
7	book equity	us-gaap:StockholdersEquity	$4.1M	2021-12-31	2024-03-29	10-K	24-011910
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$66,000	2021-12-31	2023-04-12	10-K	23-011960
9	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$1.1M	2019-12-31	2021-04-16	10-K	21-009071
10	book equity	us-gaap:StockholdersEquity	$2.0M	2019-12-31	2021-04-16	10-K	21-009071
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$845,098	2019-12-31	2021-04-16	10-K	21-009071
12	net income	us-gaap:NetIncomeLoss	-$2.5M	2025-12-31	2026-03-23	10-K	26-012156
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$172,000	2025-12-31	2026-03-23	10-K	26-012156
14	assets	us-gaap:Assets	$25.6M	2024-12-31	2026-03-23	10-K	26-012156
15	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$19.7M	2025-12-31	2026-03-23	10-K	26-012156
16	gross profit	us-gaap:GrossProfit	$3.6M	2024-12-31	2026-03-23	10-K	26-012156
17	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$18.0M	2024-12-31	2026-03-23	10-K	26-012156
18	gross profit	us-gaap:GrossProfit	$3.3M	2023-12-31	2025-04-15	10-K	25-004622
19	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$17.8M	2023-12-31	2025-04-15	10-K	25-004622
20	gross profit	us-gaap:GrossProfit	$3.1M	2022-12-31	2024-03-29	10-K	24-011910
21	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$18.0M	2022-12-31	2024-03-29	10-K	24-011910
22	gross profit	us-gaap:GrossProfit	$3.8M	2021-12-31	2023-04-12	10-K	23-011960
23	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$24.1M	2021-12-31	2023-04-12	10-K	23-011960
24	current assets	us-gaap:AssetsCurrent	$15.1M	2025-12-31	2026-03-23	10-K	26-012156
25	current liabilities	us-gaap:LiabilitiesCurrent	$10.7M	2025-12-31	2026-03-23	10-K	26-012156
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$28.4M	2025-12-31	2026-03-23	10-K	26-012156
27	operating income	us-gaap:OperatingIncomeLoss	-$2.0M	2025-12-31	2026-03-23	10-K	26-012156
28	book equity	us-gaap:StockholdersEquity	$8.6M	2025-12-31	2026-03-23	10-K	26-012156
29	liabilities	us-gaap:Liabilities	$13.9M	2025-12-31	2026-03-23	10-K	26-012156
30	operating income	us-gaap:OperatingIncomeLoss	-$3.1M	2019-12-31	2021-04-16	10-K	21-009071

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31	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$1.1M	2019-12-31	2020-05-15	10-K	20-010831
32	operating income	us-gaap:OperatingIncomeLoss	-$399,000	2023-12-31	2025-04-15	10-K	25-004622
33	interest expense	us-gaap:InterestExpense	$628,000	2023-12-31	2024-03-29	10-K	24-011910
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$1.3M	2024-12-31	2026-03-23	10-K	26-012156
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$331,000	2024-12-31	2025-04-15	10-K	25-004622
36	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$1.2M	2023-12-31	2025-04-15	10-K	25-004622
37	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$221,000	2023-12-31	2025-04-15	10-K	25-004622
38	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$2.4M	2022-12-31	2024-03-29	10-K	24-011910
39	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$163,000	2022-12-31	2024-03-29	10-K	24-011910
40	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$3.7M	2021-12-31	2023-04-12	10-K	23-011960
41	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$122,000	2021-12-31	2022-04-15	10-K	22-009039
42	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$753,199	2017-12-31	2018-04-02	10-K	18-006000
43	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$1.5M	2017-12-31	2019-04-16	10-K	19-007201
44	operating income	us-gaap:OperatingIncomeLoss	$629,761	2017-12-31	2019-04-16	10-K	19-007201
45	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$1.1M	2017-12-31	2019-04-16	10-K	19-007201
46	income tax	us-gaap:IncomeTaxExpenseBenefit	$711,533	2017-12-31	2019-04-16	10-K	19-007201
47	current assets	us-gaap:AssetsCurrent	$32.3M	2017-12-31	2019-04-16	10-K	19-007201
48	current liabilities	us-gaap:LiabilitiesCurrent	$22.7M	2017-12-31	2019-04-16	10-K	19-007201
49	current assets	us-gaap:AssetsCurrent	$35.0M	2016-12-31	2018-04-02	10-K	18-006000
50	current liabilities	us-gaap:LiabilitiesCurrent	$23.9M	2016-12-31	2018-04-02	10-K	18-006000
51	assets	us-gaap:Assets	$17.2M	2023-12-31	2025-04-15	10-K	25-004622
52	assets	us-gaap:Assets	$15.3M	2022-12-31	2024-03-29	10-K	24-011910
53	shares outstanding	dei:EntityCommonStockSharesOutstanding	2,597,363	2026-03-23	2026-03-23	10-K	26-012156
54	shares outstanding	dei:EntityCommonStockSharesOutstanding	25,891,845	2025-03-20	2025-04-15	10-K	25-004622