Compx International Inc.

CIX

NYSE; manufacturing; SIC 3420, Cutlery, Handtools & General Hardware; CIK 0001049606

A

strongest fifth of 246 graded peers in manufacturing

rank 29 of 246; percentile 11.4; sampling error 3.0 points; lower is stronger

A B C D E

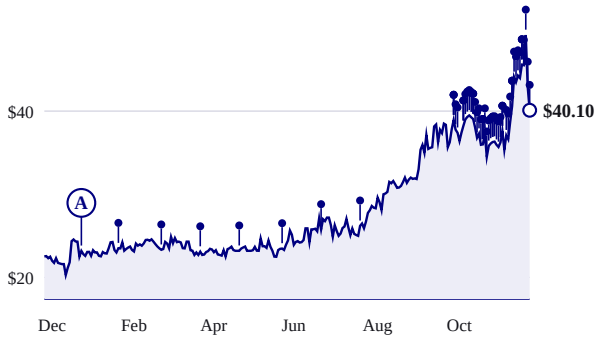
A, the bull



Scoreboard

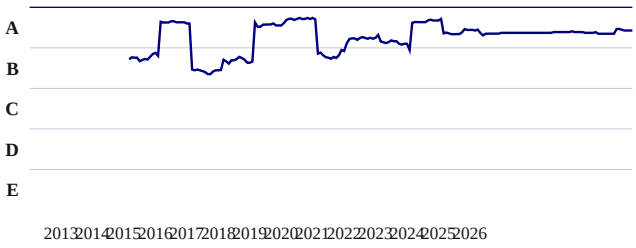
Profitability	B percentile 31.6
Solvency	A percentile 8.0
Growth and financing	D percentile 67.9
Reliability	0.87 AUC filers with $120M to $591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025
Peer failure rate	1.03% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$120M to $591M assets total assets $156.2M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered; fortress balance sheet not computable: distress
Inputs computable	9 of 13
Graded from	filings received through Mar 4, 2026 264 days before the rescan; latest periodic filing 10-Q received Nov 4, 2026
Last close	$40.25 2026-11-20; market equity $496.6M; 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 4, 2026

CompX International Inc. (NYSE American: CIX), incorporated in Delaware in 1993, is a leading manufacturer of security products used in the postal, recreational transportation, office and institutional furniture, cabinetry, tool storage, healthcare applications and a variety of other industries. We are also a leading manufacturer of wake enhancement systems, stainless steel exhaust systems, gauges, throttle controls and trim tabs and related hardware and accessories for the recreational marine and various other industries. Our products are principally designed for use in medium to high-end product applications where design, quality and durability are valued by our customers.

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 31.6						
Gross profitability	30.8%	22.3%		19.2	267	2025-12-31
Return on invested capital	not computable	9.9%				

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required facts have no common fiscal period end					
Accruals ratio	(2.1%)	(3.7%)	66.6	288	2025-12-31
Gross margin stability, five years	0.8 pts	2.1 pts	9.0	222	2025-12-31
Solvency, sleeve percentile 8.0					
Altman Z double-prime	not computable	3.74			
one or more required annual facts are missing					
Net debt to EBITDA	not computable	1.75x			
latest aligned inputs end 2012-12-31; latest annual assets end 2025-12-31					
Interest coverage	not computable	5.13x			
latest aligned inputs end 2013-12-31; latest annual assets end 2025-12-31					
Current ratio	5.87x	2.30x	8.0	302	2025-12-31
Growth and financing, sleeve percentile 67.9					
Revenue growth, three-year compound	(1.7%)	2.3%	68.5	261	2025-12-31
Free cash flow growth, three-year compound	13.2%	13.5%	52.2	139	2025-12-31
Reinvestment rate	(37.4%)	24.5%	84.9	140	2025-12-31
Asset growth, three years	(4.2%)	4.2%	82.2	265	2025-12-31
Net share issuance, one year	0.04%	(0.04%)	51.9	240	2026-02-28

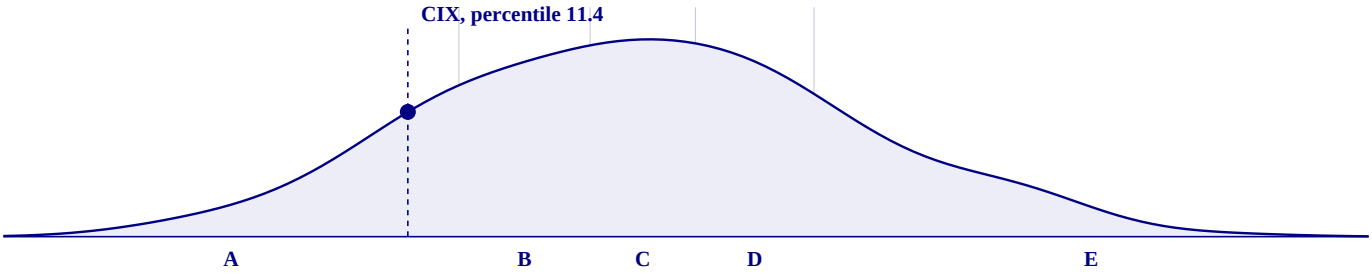
Warnings

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

Check	Measured
Fortress balance sheet	cash minus debt is 45,297,000 USD; Altman Z is not used

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
24	Lennox International Inc. (LII)	9.4	A	
25	BWX Technologies, Inc. (BWXT)	9.8	A	
26	Mueller Water Products, Inc. (MWA)	10.2	A	
27	Ennis, Inc. (EBF)	10.6	A	
28	Astronics Corp. (ATRO)	11.0	A	
29	Compx International Inc. (CIX)	11.4	A	fortress balance sheet
30	SPX Technologies, Inc. (SPXC)	11.8	A	
31	Acme United Corp. (ACU)	12.2	A	
32	National Presto Industries Inc. (NPK)	12.7	A	
33	Howmet Aerospace Inc. (HWM)	13.1	A	
34	TechnipFMC plc (FTI)	13.5	A	fortress balance sheet

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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	74.2%	10.0%	89
Distance from 52-week high	(18.4%)	(32.1%)	77
EBIT to enterprise value	5.0%	4.5%	55
Free cash flow yield	3.9%	3.8%	51
Book value to price	0.30	0.39	36
Sales to price	0.32	0.60	22
Composite equity issuance, five years	(43.8%)	(9.5%)	3
Relative strength against the sector, log excess return	0.47	0.01	89
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	pass
Operating cash flow exceeds net income	pass
Long-term leverage fell	fail
Current ratio improved	fail
No new shares issued	fail
Gross margin improved	pass
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$57.3M
Operating cash flow, four quarters	$27.3M
Months of runway	not finite
Days since last periodic filing	19 (10-Q received Nov 4, 2026)
Median daily dollar volume, 63 sessions	$592,690

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	$48.2M	2025-12-31	2026-03-04	10-K	26-023463
2	assets	us-gaap:Assets	$156.2M	2025-12-31	2026-03-04	10-K	26-023463
3	net income	us-gaap:NetIncomeLoss	$19.5M	2025-12-31	2026-03-04	10-K	26-023463
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$22.9M	2025-12-31	2026-03-04	10-K	26-023463
5	assets	us-gaap:Assets	$163.0M	2024-12-31	2026-03-04	10-K	26-023463
6	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$158.3M	2025-12-31	2026-03-04	10-K	26-023463
7	gross profit	us-gaap:GrossProfit	$41.4M	2024-12-31	2026-03-04	10-K	26-023463
8	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$145.9M	2024-12-31	2026-03-04	10-K	26-023463
9	gross profit	us-gaap:GrossProfit	$49.2M	2023-12-31	2026-03-04	10-K	26-023463
10	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$161.3M	2023-12-31	2026-03-04	10-K	26-023463
11	gross profit	us-gaap:GrossProfit	$48.8M	2022-12-31	2025-03-05	10-K	25-002264
12	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$166.6M	2022-12-31	2025-03-05	10-K	25-002264
13	gross profit	us-gaap:GrossProfit	$42.7M	2021-12-31	2024-02-28	10-K	24-002007
14	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$140.8M	2021-12-31	2024-02-28	10-K	24-002007
15	total debt	us-gaap:LongTermDebt	$18.5M	2012-12-31	2014-03-05	10-K	14-000572
16	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$63.8M	2012-12-31	2016-03-03	10-K	16-013997
17	operating income	us-gaap:OperatingIncomeLoss	$5.4M	2012-12-31	2015-03-05	10-K	15-001351

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18	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$5.8M	2012-12-31	2015-03-05	10-K	15-001351
19	operating income	us-gaap:OperatingIncomeLoss	$9.3M	2013-12-31	2016-03-03	10-K	16-013997
20	interest expense	us-gaap:InterestExpense	$127,000	2013-12-31	2016-03-03	10-K	16-013997
21	current assets	us-gaap:AssetsCurrent	$100.1M	2025-12-31	2026-03-04	10-K	26-023463
22	current liabilities	us-gaap:LiabilitiesCurrent	$17.0M	2025-12-31	2026-03-04	10-K	26-023463
23	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$3.7M	2025-12-31	2026-03-04	10-K	26-023463
24	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$22.9M	2024-12-31	2026-03-04	10-K	26-023463
25	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$1.4M	2024-12-31	2026-03-04	10-K	26-023463
26	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$25.8M	2023-12-31	2026-03-04	10-K	26-023463
27	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$1.1M	2023-12-31	2026-03-04	10-K	26-023463
28	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$16.9M	2022-12-31	2025-03-05	10-K	25-002264
29	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$3.7M	2022-12-31	2025-03-05	10-K	25-002264
30	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$3.7M	2025-12-31	2026-03-04	10-K	26-023463
31	operating income	us-gaap:OperatingIncomeLoss	$22.6M	2025-12-31	2026-03-04	10-K	26-023463
32	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$25.8M	2025-12-31	2026-03-04	10-K	26-023463
33	income tax	us-gaap:IncomeTaxExpenseBenefit	$6.4M	2025-12-31	2026-03-04	10-K	26-023463
34	current assets	us-gaap:AssetsCurrent	$105.3M	2024-12-31	2026-03-04	10-K	26-023463
35	current liabilities	us-gaap:LiabilitiesCurrent	$15.8M	2024-12-31	2026-03-04	10-K	26-023463
36	assets	us-gaap:Assets	$187.6M	2023-12-31	2025-03-05	10-K	25-002264
37	assets	us-gaap:Assets	$177.4M	2022-12-31	2025-03-05	10-K	25-002264
38	shares outstanding	dei:EntityCommonStockSharesOutstanding	12,323,057	2026-02-28	2026-03-04	10-K	26-023463
39	shares outstanding	dei:EntityCommonStockSharesOutstanding	12,318,557	2025-02-28	2025-03-05	10-K	25-002264

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