

Allient Inc. (ALNT)

Nasdaq; business equipment; SIC 3825, Instruments For Meas & Testing of Electricity & Elec Signals; CIK 0000046129

Allient Inc. ALNT; business equipment	
Grade	B A B C D E second fifth of 497 graded peers percentile 23.6; sampling error 2.2 points; lower is stronger
Rank	118 of 497
Profitability	B percentile 37.7
Solvency	B percentile 24.9
Growth and financing	C/D percentile 59.2
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 \$577.6M
Standard universe	inside revenue above \$1M and assets above \$10M
Warnings	none active not computable: distress
Inputs computable	9 of 14
Graded from	filings received through Mar 5, 2026 218 days before the rescans; latest periodic filing 10-Q received Aug 5, 2026
Last close	\$108.43 2026-10-08; market equity \$1.8B
Price used in grade	None



B, the elk
second fifth of its sector; letters are fifths of the 497 graded peers

Share price, twelve months to the rescans
split-adjusted close; the letter is fixed at the rescans that set it



Rescans on file: A/B from Mar 21, 2026, B from May 21, 2026, A/B from Jul 21, 2026, B from Sep 21, 2026

Letter at every rescan

Jan 21, 2012 to Oct 9, 2026; sector percentile, 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 5, 2026

We are a global company that designs, manufactures and sells precision and specialty controlled motion components and systems used in a broad range of industries. Our target markets include Industrial, Vehicle, Medical, and Aerospace & Defense (A&D). We are headquartered in Amherst, NY, and have global production operations and sell to markets across the United States, Canada, South America, Europe and Asia-Pacific. We are known worldwide for our expertise in electro-magnetic, mechanical and electronic motion

technology.

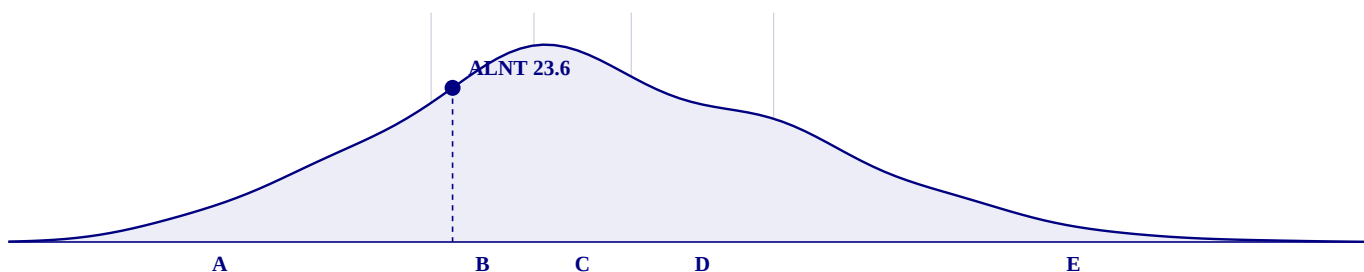
The fourteen inputs

lower percentile is stronger; equal-weighted sleeves

Input	Percentile, 0 to 100	Value	Peer median	Percentile	Peers	Period end
Profitability, sleeve percentile 37.7						
Gross profitability		31.5%	28.5%	40.6	558	2025-12-31
Return on invested capital		not computable	10.9%			latest aligned inputs end 2015-12-31; latest annual assets end 2025-12-31
Accruals ratio		(6.0%)	(7.4%)	60.0	621	2025-12-31
Gross margin stability, five years		0.9 pts	2.4 pts	12.4	429	2025-12-31
Solvency, sleeve percentile 24.9						
Twelve-month failure probability		not computable	0.05%			latest liabilities, cash plus short-term investments, book equity, and shares are required
Altman Z double-prime		4.86	2.18	23.7	566	2025-12-31
Net debt to EBITDA		not computable	1.11x			latest aligned inputs end 2015-12-31; latest annual assets end 2025-12-31
Interest coverage		not computable	3.77x			latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31
Current ratio		3.66x	2.02x	26.2	666	2025-12-31
Growth and financing, sleeve percentile 59.2						
Revenue growth, three-year compound		3.3%	6.4%	58.3	538	2025-12-31
Free cash flow growth, three-year compound		not computable	17.2%			current FCF must be positive and base FCF must exceed \$100,000
Reinvestment rate		(43.0%)	14.3%	66.2	226	2025-12-31
Asset growth, three years		(0.6%)	5.0%	63.2	563	2025-12-31
Net share issuance, one year		0.6%	0.5%	49.0	407	2026-03-05

Among 497 peers

business equipment; 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
113	Eos Energy Enterprises, Inc. (EOSE)	22.7	B	
114	Eos Energy Enterprises, Inc. (EOSEW)	22.7	B	
115	Yext, Inc. (YEXT)	23.0	B	fortress
				balance sheet
116	Transcat Inc. (TRNS)	23.2	B	
117	PagerDuty, Inc. (PD)	23.4	B	
118	Allient Inc. (ALNT) <	23.6	B	
119	Ambarella Inc. (AMBA)	23.8	B	
120	Innovative Solutions & Support Inc. (IA)	24.0	B	
121	Atlassian Corp. (TEAM)	24.2	B	
122	Elastic N.V. (ESTC)	24.4	B	fortress
				balance sheet
123	Parsons Corp. (PSN)	24.6	B	

What the price implies

at the 2026-10-08 close; none enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	110.5%	2.2%	92
Distance from 52-week high	(8.4%)	(30.0%)	82
EBIT to enterprise value	2.3%	1.5%	59
Free cash flow yield	2.7%	2.7%	50
Book value to price	0.17	0.23	38
Sales to price	0.30	0.30	49
Composite equity issuance, five years	12.9%	3.9%	62
Relative strength against the sector, log excess return	0.46	(0.26)	92

Diagnostics

not in the grade

Measure	Value
Piotroski F-score 7 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	pass
Current ratio improved	fail
No new shares issued	fail
Gross margin improved	pass
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	\$42.1M
Operating cash flow, four quarters	\$38.4M
Months of runway	not finite
Days since last periodic filing	65 (10-Q received Aug 5, 2026)

Median daily dollar volume, 63 sessions

\$21.2M

Sources

each row links to the filing index on sec.gov

#	Concept	XBRL tag	Value	Period end	Received	Form	Accession
1	gross profit	us-gaap:GrossProfit	\$181.7M	2025-12-31	2026-03-05	10-K	0001104659-26-024123
2	assets	us-gaap:Assets	\$577.6M	2025-12-31	2026-03-05	10-K	0001104659-26-024123
3	operating income	us-gaap:OperatingIncomeLoss	\$20.9M	2015-12-31	2018-03-14	10-K	0001104659-18-017478
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraord	\$15.4M	2015-12-31	2018-03-14	10-K	0001104659-18-017478
5	income tax	us-gaap:IncomeTaxExpenseBenefit	\$4.3M	2015-12-31	2018-03-14	10-K	0001104659-18-017478
6	total debt	us-gaap:LongTermDebt	\$68.8M	2015-12-31	2016-03-09	10-K	0001104659-16-103933
7	book equity	us-gaap:StockholdersEquity	\$64.6M	2015-12-31	2019-03-13	10-K	0001104659-19-014558
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$21.3M	2015-12-31	2019-03-13	10-K	0001104659-19-014558
9	total debt	us-gaap:LongTermDebt	\$74.8M	2014-12-31	2015-03-12	10-K	0001047469-15-002052
10	book equity	us-gaap:StockholdersEquity	\$56.0M	2014-12-31	2018-03-14	10-K	0001104659-18-017478
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$13.1M	2014-12-31	2018-03-14	10-K	0001104659-18-017478
12	net income	us-gaap:ProfitLoss	\$22.0M	2025-12-31	2026-03-05	10-K	0001104659-26-024123
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$56.7M	2025-12-31	2026-03-05	10-K	0001104659-26-024123
14	assets	us-gaap:Assets	\$575.8M	2024-12-31	2026-03-05	10-K	0001104659-26-024123
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$554.5M	2025-12-31	2026-03-05	10-K	0001104659-26-024123
16	gross profit	us-gaap:GrossProfit	\$165.7M	2024-12-31	2026-03-05	10-K	0001104659-26-024123
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$530.0M	2024-12-31	2026-03-05	10-K	0001104659-26-024123
18	gross profit	us-gaap:GrossProfit	\$183.7M	2023-12-31	2026-03-05	10-K	0001104659-26-024123
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$578.6M	2023-12-31	2026-03-05	10-K	0001104659-26-024123
20	gross profit	us-gaap:GrossProfit	\$157.3M	2022-12-31	2025-03-05	10-K	0001558370-25-002265
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$503.0M	2022-12-31	2025-03-05	10-K	0001558370-25-002265
22	gross profit	us-gaap:GrossProfit	\$121.1M	2021-12-31	2024-03-05	10-K	0001558370-24-002487
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$403.5M	2021-12-31	2024-03-05	10-K	0001558370-24-002487
24	current assets	us-gaap:AssetsCurrent	\$253.4M	2025-12-31	2026-03-05	10-K	0001104659-26-024123
25	current liabilities	us-gaap:LiabilitiesCurrent	\$69.3M	2025-12-31	2026-03-05	10-K	0001104659-26-024123
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	\$197.0M	2025-12-31	2026-03-05	10-K	0001104659-26-024123
27	operating income	us-gaap:OperatingIncomeLoss	\$44.0M	2025-12-31	2026-03-05	10-K	0001104659-26-024123
28	book equity	us-gaap:StockholdersEquity	\$301.5M	2025-12-31	2026-03-05	10-K	0001104659-26-024123
29	liabilities	us-gaap:Liabilities	\$276.1M	2025-12-31	2026-03-05	10-K	0001104659-26-024123
30	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	\$7.5M	2015-12-31	2018-03-14	10-K	0001104659-18-017478
31	operating income	us-gaap:OperatingIncomeLoss	\$42.3M	2023-12-31	2026-03-05	10-K	0001104659-26-024123
32	interest expense	us-gaap:InterestExpense	\$12.4M	2023-12-31	2024-03-05	10-K	0001558370-24-002487
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$7.0M	2025-12-31	2026-03-05	10-K	0001104659-26-024123
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$41.9M	2024-12-31	2026-03-05	10-K	0001104659-26-024123
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$9.7M	2024-12-31	2026-03-05	10-K	0001104659-26-024123
36	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$45.0M	2023-12-31	2026-03-05	10-K	0001104659-26-024123
37	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$11.6M	2023-12-31	2026-03-05	10-K	0001104659-26-024123
38	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$5.6M	2022-12-31	2025-03-05	10-K	0001558370-25-002265
39	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$15.9M	2022-12-31	2025-03-05	10-K	0001558370-25-002265
40	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	\$25.4M	2025-12-31	2026-03-05	10-K	0001104659-26-024123
41	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraord	\$26.7M	2025-12-31	2026-03-05	10-K	0001104659-26-024123
42	income tax	us-gaap:IncomeTaxExpenseBenefit	\$6.7M	2025-12-31	2026-03-05	10-K	0001104659-26-024123
43	current assets	us-gaap:AssetsCurrent	\$237.6M	2024-12-31	2026-03-05	10-K	0001104659-26-024123
44	current liabilities	us-gaap:LiabilitiesCurrent	\$57.4M	2024-12-31	2026-03-05	10-K	0001104659-26-024123
45	assets	us-gaap:Assets	\$597.5M	2023-12-31	2025-03-05	10-K	0001558370-25-002265
46	assets	us-gaap:Assets	\$588.3M	2022-12-31	2024-03-05	10-K	0001558370-24-002487
47	shares outstanding	dei:EntityCommonStockSharesOutstanding	16,940,049	2026-03-05	2026-03-05	10-K	0001104659-26-024123
48	shares outstanding	dei:EntityCommonStockSharesOutstanding	16,844,836	2025-03-05	2025-03-05	10-K	0001558370-25-002265