

Bgsf, Inc. (BGSF)

NYSE; other; SIC 7363, Services-Help Supply Services; CIK 0001474903

Bgsf, Inc. BGSF; other	
Grade	B A B C D E second fifth of 336 graded peers percentile 36.1; sampling error 2.6 points; lower is stronger
Rank	122 of 336
Profitability	B + + + + + percentile 27.4
Solvency	A + + + + + percentile 14.8
Growth and financing	E + + + + + percentile 87.9
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 \$57.8M
Standard universe	inside revenue above \$1M and assets above \$10M
Warnings	late filer
Inputs computable	9 of 14
Graded from	filings received through Mar 30, 2026 193 days before the rescans; latest periodic filing 10-Q received Aug 5, 2026
Last close	\$4.65 2026-10-07; market equity \$49.6M
Price used in grade	None



B, the elk
second fifth of its sector; letters are fifths of the 336 graded peers

Share price, twelve months to the rescans

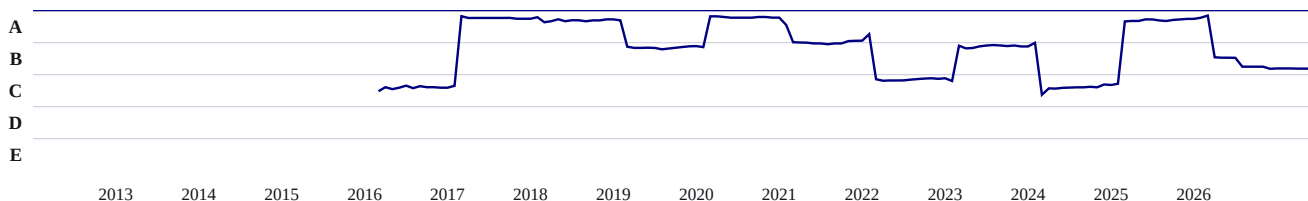
split-adjusted close; the letter is fixed at the rescans that set it



Rescans on file: A/B from Jun 21, 2023, C from Mar 21, 2024, A from Mar 21, 2025, B from Apr 21, 2026

Letter at every rescans

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 30, 2026

BGSF, Inc. ("BGSF," "we," or the "Company") is a leading national provider of staffing and workforce solutions for the Property Management industry. We operate primarily within the U.S. through our Property Management segment, which provides maintenance and office field talent across 44 of the states and D.C. to property management companies responsible for the apartment communities and commercial buildings day to day operations. We provide field talent to a variety of client partners that are seeking to match their workforce requirements to their business needs.

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 27.4						
Gross profitability		57.6%	27.1%	11.8	289	2025-12-28
Return on invested capital		not computable	10.0%			latest aligned inputs end 2015-12-27; latest annual assets end 2025-12-28
Accruals ratio		(11.1%)	(5.9%)	22.6	506	2025-12-28
Gross margin stability, five years		2.1 pts	2.2 pts	47.8	204	2025-12-28
Solvency, sleeve percentile 14.8						
Twelve-month failure probability		0.03%	0.04%	25.0	45	2026-06-28
Altman Z double-prime		6.23	2.05	10.1	386	2025-12-28
Net debt to EBITDA		not computable	2.52x			latest aligned inputs end 2015-12-27; latest annual assets end 2025-12-28
Interest coverage		not computable	2.18x			one or more required annual facts are missing
Current ratio		4.12x	1.32x	9.3	506	2025-12-28
Growth and financing, sleeve percentile 87.9						
Revenue growth, three-year compound		(32.1%)	5.1%	97.8	403	2025-12-28
Free cash flow growth, three-year compound		not computable	8.7%			current FCF must be positive and base FCF must exceed \$100,000
Reinvestment rate		not computable	11.9%			NOPAT must exceed \$100,000
Asset growth, three years		(33.3%)	4.1%	98.4	438	2025-12-28
Net share issuance, one year		1.5%	(0.4%)	67.6	356	2026-03-11

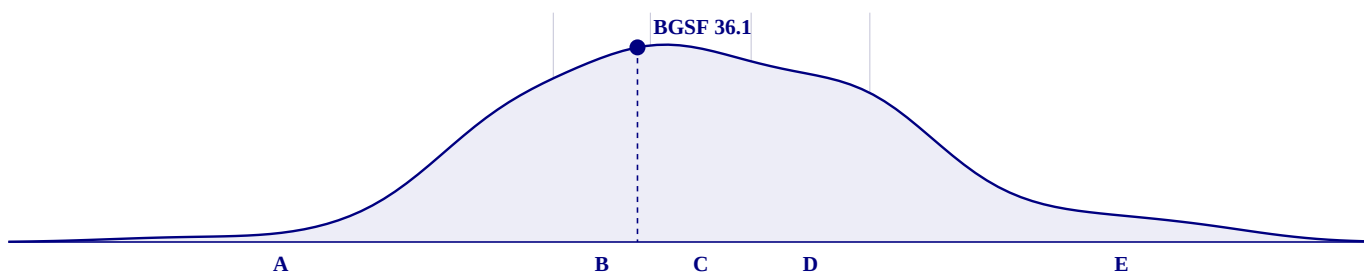
Warnings

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

Check	Measured
Late filer	found 1 NT 10-K/Q filings in the last eight quarters

Among 336 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
117	Xometry, Inc. (XMTR)	34.6	B	
118	Astrana Health, Inc. (ASTH)	34.9	B	late filer
119	Evolent Health, Inc. (EVH)	35.2	B	
120	Netflix Inc. (NFLX)	35.5	B	
121	United Rentals, Inc. (URI)	35.8	B	
122	Bgsf, Inc. (BGSF) <	36.1	B	late filer
123	Sterling Infrastructure, Inc. (STRL)	36.4	B	
124	Energy Fuels Inc. (UUUU)	36.7	B	
125	Red Rock Resorts, Inc. (RRR)	37.0	B	
126	Cemtrex Inc. (CETX)	37.3	B	
127	Upbound Group, Inc. (UPBD)	37.6	B/C	

What the price implies

at the 2026-10-07 close; none enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	4.9%	2.0%	52
Distance from 52-week high	(27.5%)	(26.8%)	49
EBIT to enterprise value	(16.0%)	4.4%	7
Free cash flow yield	0.01%	4.1%	23
Book value to price	0.90	0.34	84
Sales to price	1.83	0.70	78
Composite equity issuance, five years	(43.9%)	(8.8%)	5
Relative strength against the sector, log excess return	(0.10)	(0.13)	52

Diagnostics

not in the grade

Measure	Value
Piotroski F-score 5 of 9, period end 2025-12-28	
Return on assets above zero	fail
Operating cash flow above zero	pass
Return on assets improved	fail
Operating cash flow exceeds net income	pass
Long-term leverage fell	pass
Current ratio improved	pass
No new shares issued	fail
Gross margin improved	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	\$9.7M
Operating cash flow, four quarters	-\$3.2M
Months of runway	36.1
Days since last periodic filing	65 (10-Q received Aug 5, 2026)
Median daily dollar volume, 63 sessions	\$34,187

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	\$33.3M	2025-12-28	2026-03-30	10-K	0001474903-26-000030
2	assets	us-gaap:Assets	\$57.8M	2025-12-28	2026-03-30	10-K	0001474903-26-000030
3	operating income	us-gaap:OperatingIncomeLoss	\$12.0M	2015-12-27	2018-03-08	10-K	0001474903-18-000011
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraord	\$8.7M	2015-12-27	2018-03-08	10-K	0001474903-18-000011
5	income tax	us-gaap:IncomeTaxExpenseBenefit	\$3.4M	2015-12-27	2018-03-08	10-K	0001474903-18-000011
6	total debt	us-gaap:LongTermDebt	\$14.6M	2015-12-27	2016-03-07	10-K	0001474903-16-000092
7	book equity	us-gaap:StockholdersEquity	\$25.9M	2015-12-27	2019-03-12	10-K	0001474903-19-000010
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$0	2015-12-27	2019-03-12	10-K	0001474903-19-000010
9	total debt	us-gaap:LongTermDebt	\$16.9M	2014-12-28	2016-03-07	10-K	0001474903-16-000092
10	book equity	us-gaap:StockholdersEquity	\$16.4M	2014-12-28	2018-03-08	10-K	0001474903-18-000011
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$0	2014-12-28	2018-03-08	10-K	0001474903-18-000011
12	net income	us-gaap:NetIncomeLoss	-\$11.4M	2025-12-28	2026-03-30	10-K	0001474903-26-000030
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$142,000	2025-12-28	2026-03-30	10-K	0001474903-26-000030
14	assets	us-gaap:Assets	\$150.1M	2024-12-29	2026-03-30	10-K	0001474903-26-000030
15	revenue	us-gaap:Revenues	\$93.3M	2025-12-28	2026-03-30	10-K	0001474903-26-000030
16	gross profit	us-gaap:GrossProfit	\$38.4M	2024-12-29	2026-03-30	10-K	0001474903-26-000030
17	revenue	us-gaap:Revenues	\$104.4M	2024-12-29	2026-03-30	10-K	0001474903-26-000030
18	gross profit	us-gaap:GrossProfit	\$49.8M	2023-12-31	2026-03-30	10-K	0001474903-26-000030
19	revenue	us-gaap:Revenues	\$125.1M	2023-12-31	2026-03-30	10-K	0001474903-26-000030
20	gross profit	us-gaap:GrossProfit	\$103.5M	2023-01-01	2025-03-17	10-K	0001474903-25-000016
21	revenue	us-gaap:Revenues	\$298.4M	2023-01-01	2025-03-17	10-K	0001474903-25-000016
22	gross profit	us-gaap:GrossProfit	\$80.9M	2021-12-26	2024-03-15	10-K	0001474903-24-000026
23	revenue	us-gaap:Revenues	\$239.0M	2021-12-26	2024-03-15	10-K	0001474903-24-000026
24	current assets	us-gaap:AssetsCurrent	\$38.5M	2025-12-28	2026-03-30	10-K	0001474903-26-000030
25	current liabilities	us-gaap:LiabilitiesCurrent	\$9.3M	2025-12-28	2026-03-30	10-K	0001474903-26-000030
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-\$21.9M	2025-12-28	2026-03-30	10-K	0001474903-26-000030
27	operating income	us-gaap:OperatingIncomeLoss	-\$8.9M	2025-12-28	2026-03-30	10-K	0001474903-26-000030
28	book equity	us-gaap:StockholdersEquity	\$48.1M	2025-12-28	2026-03-30	10-K	0001474903-26-000030
29	liabilities	us-gaap:Liabilities	\$9.7M	2025-12-28	2026-03-30	10-K	0001474903-26-000030
30	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	\$5.5M	2015-12-27	2016-03-07	10-K	0001474903-16-000092
31	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	\$138,000	2025-12-28	2026-03-30	10-K	0001474903-26-000030
32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$24.4M	2024-12-29	2026-03-30	10-K	0001474903-26-000030
33	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	\$1.2M	2024-12-29	2026-03-30	10-K	0001474903-26-000030
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$20.4M	2023-12-31	2026-03-30	10-K	0001474903-26-000030
35	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	\$2.2M	2023-12-31	2026-03-30	10-K	0001474903-26-000030
36	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-\$7.1M	2023-01-01	2025-03-17	10-K	0001474903-25-000016
37	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	\$5.7M	2023-01-01	2025-03-17	10-K	0001474903-25-000016
38	depreciation amortization	us-gaap:Depreciation	\$113,000	2025-12-28	2026-03-30	10-K	0001474903-26-000030
39	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraord	\$13.4M	2015-12-27	2018-03-08	10-K	0001474903-18-000011
40	income tax	us-gaap:IncomeTaxExpenseBenefit	-\$1.3M	2025-12-28	2026-03-30	10-K	0001474903-26-000030
41	current assets	us-gaap:AssetsCurrent	\$45.3M	2024-12-29	2026-03-30	10-K	0001474903-26-000030
42	current liabilities	us-gaap:LiabilitiesCurrent	\$25.9M	2024-12-29	2026-03-30	10-K	0001474903-26-000030
43	assets	us-gaap:Assets	\$178.5M	2023-12-31	2025-03-17	10-K	0001474903-25-000016
44	assets	us-gaap:Assets	\$194.7M	2023-01-01	2024-03-15	10-K	0001474903-24-000026
45	shares outstanding	dei:EntityCommonStockSharesOutstanding	11,243,967	2026-03-11	2026-03-30	10-K	0001474903-26-000030
46	shares outstanding	dei:EntityCommonStockSharesOutstanding	11,077,007	2025-03-12	2025-03-17	10-K	0001474903-25-000016