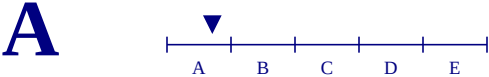


Dorman Products, Inc. (DORM)

Nasdaq; consumer durables; SIC 3714, Motor Vehicle Parts & Accessories; CIK 0000868780

Dorman Products, Inc. DORM; consumer durables	
Grade	 A strongest fifth of 460 graded peers percentile 14.2; sampling error 2.3 points; lower is stronger
Rank	64 of 460
Profitability	 D percentile 64.2
Solvency	 A percentile 15.2
Growth and financing	 B percentile 26.2
Reliability	0.91 AUC filers with \$591M to \$2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025
Peer failure rate	1.01% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	\$591M to \$2.67B assets total assets \$2.5B
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 Feb 27, 2026 224 days before the rescans; latest periodic filing 10-Q received Aug 4, 2026
Last close	\$121.63 2026-10-08; market equity \$3.6B
Price used in grade	None

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 Feb 27, 2026

We are one of the leading suppliers of replacement and upgrade parts in the motor vehicle aftermarket industry, serving passenger cars, light-, medium-, and heavy-duty trucks, as well as specialty vehicles, including utility terrain vehicles ("UTVs") and all-terrain vehicles ("ATVs"). As of December 31, 2025, we marketed approximately 144,000 distinct parts compared to approximately 138,000 as of December 31, 2024, many of which we designed and engineered.

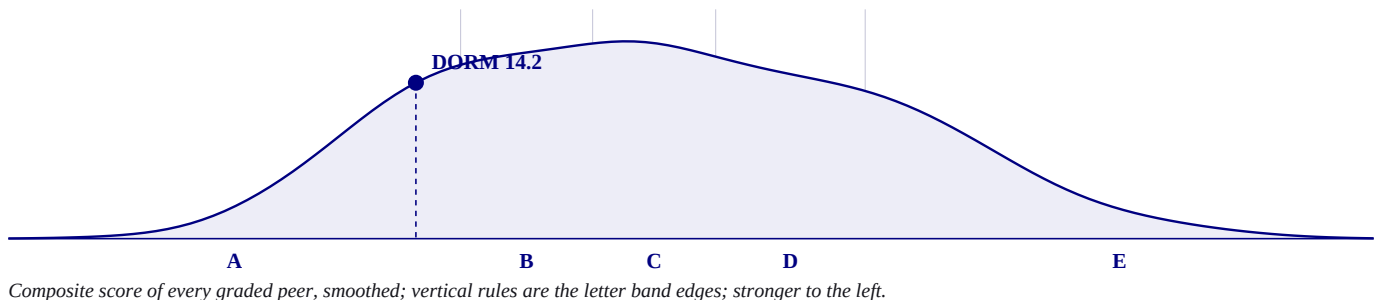
The fourteen inputs

lower percentile is stronger; equal-weighted sleeves

Input	Percentile, 0 to 100	Value	Peer median	Percentile	Peers	Period end
Profitability, sleeve percentile 64.2						
Gross profitability		36.0%	34.4%	45.1	476	2025-12-31
Return on invested capital		12.4%	8.9%	35.8	163	2025-12-31
Accruals ratio		3.7%	(5.1%)	94.1	525	2025-12-31
Gross margin stability, five years		3.6 pts	1.7 pts	82.0	407	2025-12-31
Solvency, sleeve percentile 15.2						
Twelve-month failure probability		not computable	0.04%			liabilities and a nearby cover-page share count are required at 2026-06-27
Altman Z double-prime		not computable	2.11			one or more required annual facts are missing
Net debt to EBITDA		not computable	2.11x			required facts have no common fiscal period end
Interest coverage		not computable	2.57x			latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31
Current ratio		3.09x	1.55x	15.2	541	2025-12-31
Growth and financing, sleeve percentile 26.2						
Revenue growth, three-year compound		7.1%	1.4%	22.7	482	2025-12-31
Free cash flow growth, three-year compound		170.9%	8.3%	1.6	250	2025-12-31
Reinvestment rate		not computable	12.0%			latest aligned inputs end 2016-12-31; latest annual assets end 2025-12-31
Asset growth, three years		2.1%	2.0%	46.7	487	2025-12-31
Net share issuance, one year		(1.3%)	(0.3%)	33.9	382	2026-02-24

Among 460 peers

consumer durables; letters are fifths of this list



Rank	Company	Percentile	Letter	Warnings
59	Richardson Electronics, Ltd. (RELL)	13.2	A	
60	Atmus Filtration Technologies Inc. (ATMU)	13.5	A	
61	Village Super Market Inc. (VLGEA)	13.6	A	fortress balance sheet
62	Yeti Holdings, Inc. (YETI)	13.8	A	
63	Core & Main, Inc. (CNM)	14.0	A	
64	Dorman Products, Inc. (DORM) <	14.2	A	
65	Amcon Distributing Co. (DIT)	14.4	A	
66	Tootsie Roll Industries Inc. (TR)	14.6	A	
67	Signet Jewelers Ltd. (SIG)	14.8	A	
68	Sally Beauty Holdings, Inc. (SBH)	15.2	A	
69	Escalade Inc. (ESCA)	15.4	A	fortress balance sheet

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	(17.3%)	(0.2%)	30
Distance from 52-week high	(23.0%)	(25.6%)	55
EBIT to enterprise value	7.6%	5.0%	75
Free cash flow yield	2.1%	4.6%	32
Book value to price	0.42	0.45	48
Sales to price	0.59	1.49	22
Composite equity issuance, five years	(8.1%)	(16.0%)	62
Relative strength against the sector, log excess return	(0.17)	(0.01)	33

Diagnostics

not in the grade

Measure	Value
Piotroski F-score 8 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	fail
Long-term leverage fell	pass
Current ratio improved	pass
No new shares issued	pass
Gross margin improved	pass
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	\$132.0M
Operating cash flow, four quarters	\$250.2M
Months of runway	not finite
Days since last periodic filing	66 (10-Q received Aug 4, 2026)
Median daily dollar volume, 63 sessions	\$26.9M

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	\$897.7M	2025-12-31	2026-02-27	10-K	0000868780-26-000014
2	assets	us-gaap:Assets	\$2.5B	2025-12-31	2026-02-27	10-K	0000868780-26-000014
3	operating income	us-gaap:OperatingIncomeLoss	\$299.5M	2025-12-31	2026-02-27	10-K	0000868780-26-000014
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraordinaryItems	\$275.4M	2025-12-31	2026-02-27	10-K	0000868780-26-000014
5	income tax	us-gaap:IncomeTaxExpenseBenefit	\$71.3M	2025-12-31	2026-02-27	10-K	0000868780-26-000014
6	total debt	us-gaap:LongTermDebt	\$440.6M	2025-12-31	2026-02-27	10-K	0000868780-26-000014

7	book equity	us-gaap:StockholdersEquity	\$1.5B	2025-12-31	2026-02-27	10-K	0000868780-26-000014
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$49.4M	2025-12-31	2026-02-27	10-K	0000868780-26-000014
9	total debt	us-gaap:LongTermDebt	\$468.8M	2024-12-31	2025-02-27	10-K	0000868780-25-000009
10	book equity	us-gaap:StockholdersEquity	\$1.3B	2024-12-31	2026-02-27	10-K	0000868780-26-000014
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$57.1M	2024-12-31	2026-02-27	10-K	0000868780-26-000014
12	net income	us-gaap:NetIncomeLoss	\$204.2M	2025-12-31	2026-02-27	10-K	0000868780-26-000014
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$113.6M	2025-12-31	2026-02-27	10-K	0000868780-26-000014
14	assets	us-gaap:Assets	\$2.4B	2024-12-31	2026-02-27	10-K	0000868780-26-000014
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$2.1B	2025-12-31	2026-02-27	10-K	0000868780-26-000014
16	gross profit	us-gaap:GrossProfit	\$806.4M	2024-12-31	2026-02-27	10-K	0000868780-26-000014
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$2.0B	2024-12-31	2026-02-27	10-K	0000868780-26-000014
18	gross profit	us-gaap:GrossProfit	\$685.4M	2023-12-31	2026-02-27	10-K	0000868780-26-000014
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$1.9B	2023-12-31	2026-02-27	10-K	0000868780-26-000014
20	gross profit	us-gaap:GrossProfit	\$564.5M	2022-12-31	2025-02-27	10-K	0000868780-25-000009
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$1.7B	2022-12-31	2025-02-27	10-K	0000868780-25-000009
22	gross profit	us-gaap:GrossProfit	\$462.9M	2021-12-25	2024-02-28	10-K	0000868780-24-000011
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$1.3B	2021-12-25	2024-02-28	10-K	0000868780-24-000011
24	operating income	us-gaap:OperatingIncomeLoss	\$214.8M	2023-12-31	2026-02-27	10-K	0000868780-26-000014
25	interest expense	us-gaap:InterestExpense	\$48.1M	2023-12-31	2024-02-28	10-K	0000868780-24-000011
26	current assets	us-gaap:AssetsCurrent	\$1.5B	2025-12-31	2026-02-27	10-K	0000868780-26-000014
27	current liabilities	us-gaap:LiabilitiesCurrent	\$492.8M	2025-12-31	2026-02-27	10-K	0000868780-26-000014
28	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$38.0M	2025-12-31	2026-02-27	10-K	0000868780-26-000014
29	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$231.0M	2024-12-31	2026-02-27	10-K	0000868780-26-000014
30	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$39.4M	2024-12-31	2026-02-27	10-K	0000868780-26-000014
31	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$208.8M	2023-12-31	2026-02-27	10-K	0000868780-26-000014
32	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$44.0M	2023-12-31	2026-02-27	10-K	0000868780-26-000014
33	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$41.7M	2022-12-31	2025-02-27	10-K	0000868780-25-000009
34	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$37.9M	2022-12-31	2025-02-27	10-K	0000868780-25-000009
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$20.1M	2016-12-31	2019-02-26	10-K	0001564590-19-004498
36	depreciation amortization	us-gaap:Depreciation	\$18.7M	2016-12-31	2017-02-27	10-K	0001193125-17-058492
37	operating income	us-gaap:OperatingIncomeLoss	\$168.6M	2016-12-31	2019-02-26	10-K	0001564590-19-004498
38	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraordMeasAndControlling	\$158.4M	2016-12-31	2019-02-26	10-K	0001564590-19-004498
39	income tax	us-gaap:IncomeTaxExpenseBenefit	\$62.3M	2016-12-31	2019-02-26	10-K	0001564590-19-004498
40	current assets	us-gaap:AssetsCurrent	\$551.6M	2016-12-31	2018-02-27	10-K	0001564590-18-003466
41	current liabilities	us-gaap:LiabilitiesCurrent	\$103.8M	2016-12-31	2018-02-27	10-K	0001564590-18-003466
42	current assets	us-gaap:AssetsCurrent	\$478.6M	2015-12-26	2017-02-27	10-K	0001193125-17-058492
43	current liabilities	us-gaap:LiabilitiesCurrent	\$98.6M	2015-12-26	2017-02-27	10-K	0001193125-17-058492
44	assets	us-gaap:Assets	\$2.3B	2023-12-31	2026-02-27	10-K	0000868780-26-000014
45	assets	us-gaap:Assets	\$2.3B	2022-12-31	2025-02-27	10-K	0000868780-25-000009
46	shares outstanding	dei:EntityCommonStockSharesOutstanding	30,183,260	2026-02-24	2026-02-27	10-K	0000868780-26-000014
47	shares outstanding	dei:EntityCommonStockSharesOutstanding	30,581,562	2025-02-24	2025-02-27	10-K	0000868780-25-000009