

Espey MFG & Electronics Corp. (ESP)

NYSE; business equipment; SIC 3679, Electronic Components, NEC; CIK 0000033533

[illegible]

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 Sep 23, 2026

Espey Mfg. & Electronics Corp. ("Espey") is a power electronics design and original equipment manufacturing (OEM) company with a long history of developing and delivering highly reliable products for use in military and severe environment applications. Design, manufacturing, and testing is performed in our 174,000+ square foot facility located at 233 Ballston Ave., Saratoga Springs, New

York. Espey is classified as a "smaller reporting company" for purposes of the reporting requirements under the Securities Exchange Act of 1934, as amended. Espey's common stock is publicly-traded on the NYSE American under the symbol "ESP." Espey began operations after incorporation in New York in 1928.

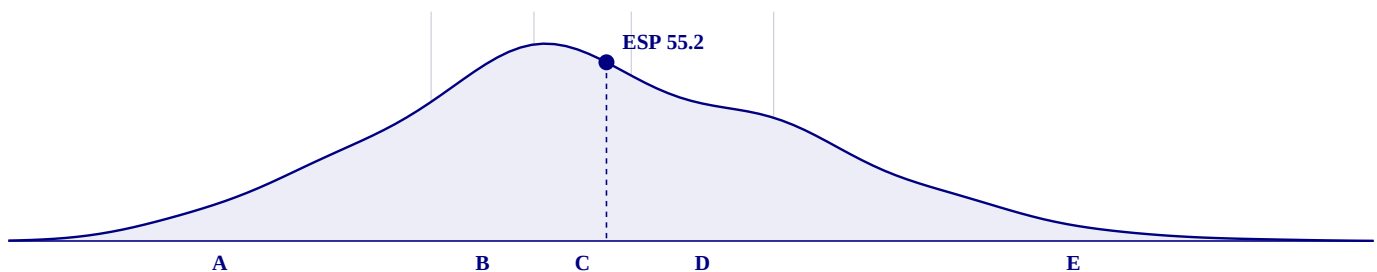
The fourteen inputs

lower percentile is stronger; equal-weighted sleeves

Input	Percentile, 0 to 100	Value	Peer median	Percentile	Peers	Period end
Profitability, sleeve percentile 79.8						
Gross profitability		16.8%	28.5%	68.2	558	2026-06-30
Return on invested capital		not computable	10.9%			one or more required annual facts are missing
Accruals ratio		6.2%	(7.4%)	92.9	621	2026-06-30
Gross margin stability, five years		6.1 pts	2.4 pts	78.3	429	2026-06-30
Solvency, sleeve percentile 25.7						
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		7.51	2.18	12.7	566	2026-06-30
Net debt to EBITDA		not computable	1.11x			one or more required annual facts are missing
Interest coverage		not computable	3.77x			one or more required annual facts are missing
Current ratio		2.50x	2.02x	38.6	666	2026-06-30
Growth and financing, sleeve percentile 44.5						
Revenue growth, three-year compound		9.0%	6.4%	42.1	538	2026-06-30
Free cash flow growth, three-year compound		(8.7%)	17.2%	84.3	268	2026-06-30
Reinvestment rate		119.6%	14.3%	17.3	226	2026-06-30
Asset growth, three years		26.9%	5.0%	10.5	563	2026-06-30
Net share issuance, one year		3.8%	0.5%	68.2	407	2026-09-15

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
270	Amkor Technology, Inc. (AMKR)	54.2	C	

271	Benchmark Electronics Inc. (BHE)	54.4	C	fortress
				balance sheet
272	Palo Alto Networks Inc. (PANW)	54.6	C	
273	Skyworks Solutions, Inc. (SWKS)	54.8	C	fortress
				balance sheet
274	TTM Technologies Inc. (TTMI)	55.0	C	
275	Espey MFG & Electronics Corp. (ESP) <	55.2	C	
276	Telos Corp. (TLS)	55.4	C	
277	Bandwidth Inc. (BAND)	55.6	C	
278	Teledyne Technologies Inc. (TDY)	55.8	C	
279	Seer, Inc. (SEER)	56.0	C	
280	GSI Technology Inc. (GSIT)	56.2	C	dilution

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	57.9%	2.2%	82
Distance from 52-week high	(17.5%)	(30.0%)	68
EBIT to enterprise value	not computable	1.5%	
Free cash flow yield	1.4%	2.7%	36
Book value to price	0.33	0.23	59
Sales to price	0.25	0.30	46
Composite equity issuance, five years	0.2%	3.9%	43
Relative strength against the sector, log excess return	0.17	(0.26)	82

Diagnostics

not in the grade

Measure	Value
Piotroski F-score None of 9, period end 2026-06-30	
Return on assets above zero	pass
Operating cash flow above zero	pass
Return on assets improved	fail
Operating cash flow exceeds net income	fail
Long-term leverage fell	fail
Current ratio improved	fail
No new shares issued	fail
Gross margin improved	pass
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	n/a
Operating cash flow, four quarters	n/a
Months of runway	not finite
Days since last periodic filing	16 (10-K received Sep 23, 2026)
Median daily dollar volume, 63 sessions	\$2.0M

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	\$16.3M	2026-06-30	2026-09-23	10-K	0001174947-26-000891
2	assets	us-gaap:Assets	\$97.2M	2026-06-30	2026-09-23	10-K	0001174947-26-000891
3	net income	us-gaap:NetIncomeLoss	\$11.2M	2026-06-30	2026-09-23	10-K	0001174947-26-000891
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$5.7M	2026-06-30	2026-09-23	10-K	0001174947-26-000891
5	assets	us-gaap:Assets	\$79.1M	2025-06-30	2026-09-23	10-K	0001174947-26-000891
6	revenue	us-gaap:Revenues	\$46.1M	2026-06-30	2026-09-23	10-K	0001174947-26-000891
7	gross profit	us-gaap:GrossProfit	\$12.7M	2025-06-30	2026-09-23	10-K	0001174947-26-000891
8	revenue	us-gaap:Revenues	\$44.0M	2025-06-30	2026-09-23	10-K	0001174947-26-000891
9	gross profit	us-gaap:GrossProfit	\$10.7M	2024-06-30	2025-09-16	10-K	0001174947-25-001227

10	revenue	us-gaap:Revenues	\$38.7M	2024-06-30	2025-09-16	10-K	0001174947-25-001227
11	gross profit	us-gaap:GrossProfit	\$8.1M	2023-06-30	2024-09-27	10-K	0001174947-24-001099
12	revenue	us-gaap:Revenues	\$35.6M	2023-06-30	2024-09-27	10-K	0001174947-24-001099
13	gross profit	us-gaap:GrossProfit	\$5.5M	2022-06-30	2023-09-21	10-K	0001174947-23-001137
14	revenue	us-gaap:Revenues	\$32.1M	2022-06-30	2023-09-21	10-K	0001174947-23-001137
15	current assets	us-gaap:AssetsCurrent	\$91.3M	2026-06-30	2026-09-23	10-K	0001174947-26-000891
16	current liabilities	us-gaap:LiabilitiesCurrent	\$36.6M	2026-06-30	2026-09-23	10-K	0001174947-26-000891
17	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	\$37.9M	2026-06-30	2026-09-23	10-K	0001174947-26-000891
18	operating income	us-gaap:OperatingIncomeLoss	\$11.6M	2026-06-30	2026-09-23	10-K	0001174947-26-000891
19	book equity	us-gaap:StockholdersEquity	\$60.6M	2026-06-30	2026-09-23	10-K	0001174947-26-000891
20	liabilities	us-gaap:Liabilities	\$36.6M	2026-06-30	2026-09-23	10-K	0001174947-26-000891
21	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$3.1M	2026-06-30	2026-09-23	10-K	0001174947-26-000891
22	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$21.0M	2025-06-30	2026-09-23	10-K	0001174947-26-000891
23	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$4.4M	2025-06-30	2026-09-23	10-K	0001174947-26-000891
24	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$10.6M	2024-06-30	2025-09-16	10-K	0001174947-25-001227
25	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$5.2M	2024-06-30	2025-09-16	10-K	0001174947-25-001227
26	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$3.9M	2023-06-30	2024-09-27	10-K	0001174947-24-001099
27	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$512,016	2023-06-30	2024-09-27	10-K	0001174947-24-001099
28	depreciation amortization	us-gaap:Depreciation	\$512,341	2026-06-30	2026-09-23	10-K	0001174947-26-000891
29	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraordinaryItemsDerecognition	\$13.3M	2026-06-30	2026-09-23	10-K	0001174947-26-000891
30	income tax	us-gaap:IncomeTaxExpenseBenefit	\$2.1M	2026-06-30	2026-09-23	10-K	0001174947-26-000891
31	current assets	us-gaap:AssetsCurrent	\$74.0M	2025-06-30	2026-09-23	10-K	0001174947-26-000891
32	current liabilities	us-gaap:LiabilitiesCurrent	\$28.3M	2025-06-30	2026-09-23	10-K	0001174947-26-000891
33	assets	us-gaap:Assets	\$56.5M	2024-06-30	2025-09-16	10-K	0001174947-25-001227
34	assets	us-gaap:Assets	\$47.5M	2023-06-30	2024-09-27	10-K	0001174947-24-001099
35	shares outstanding	dei:EntityCommonStockSharesOutstanding	3,036,872	2026-09-15	2026-09-23	10-K	0001174947-26-000891
36	shares outstanding	dei:EntityCommonStockSharesOutstanding	2,924,418	2025-09-14	2025-09-16	10-K	0001174947-25-001227