

Gorman Rupp Co. (GRC)

NYSE; manufacturing; SIC 3561, Pumps & Pumping Equipment; CIK 0000042682

Gorman Rupp Co. GRC; manufacturing	
Grade	C A B C D E middle fifth of 255 graded peers percentile 52.4; sampling error 3.0 points; lower is stronger
Rank	134 of 255
Profitability	C percentile 43.3
Solvency	C percentile 48.2
Growth and financing	C/D percentile 58.1
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 \$860.1M
Standard universe	inside revenue above \$1M and assets above \$10M
Warnings	none active not computable: distress
Inputs computable	11 of 14
Graded from	filings received through Mar 2, 2026 221 days before the rescans; latest periodic filing 10-Q received Jul 27, 2026
Last close	\$73.15 2026-10-08; market equity \$1.9B
Price used in grade	None



C, the tortoise

middle fifth of its sector; letters are fifths of the 255 graded peers

Share price, twelve months to the rescans

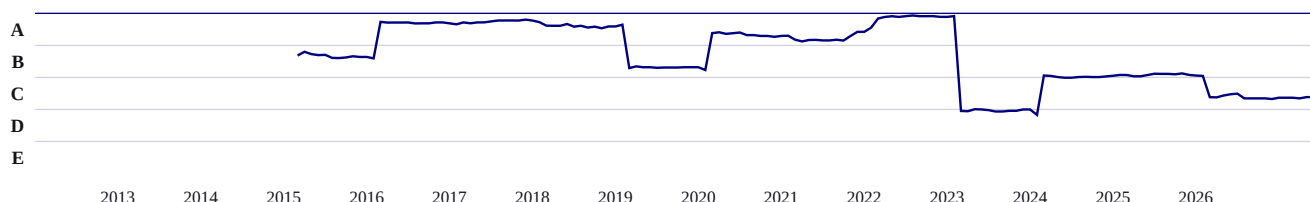
split-adjusted close; the letter is fixed at the rescans that set it



Rescans on file: C/D from Mar 21, 2023, D from Feb 21, 2024, B/C from Mar 21, 2024, C from Mar 21, 2024

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 2, 2026

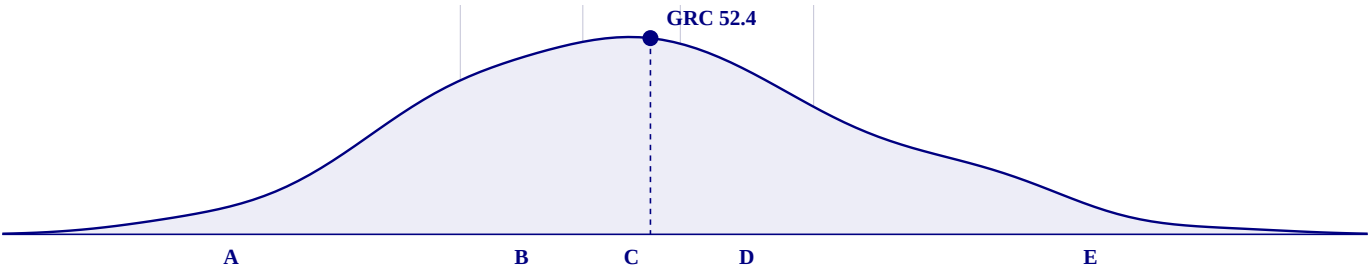
The Gorman-Rupp Company ("Registrant", "Gorman-Rupp", the "Company", "we" or "our") was incorporated in Ohio in 1934. The Company designs, manufactures and globally sells pumps and pump systems for use in water, wastewater, construction, dewatering, industrial, petroleum, original equipment, agriculture, fire suppression, heating, ventilating and air conditioning ("HVAC"), military and other liquid-handling applications. The Company operates in one business segment, the manufacture and sale

of pumps and pump systems. The following table sets forth, for the years 2023 through 2025, the total net sales, income before income taxes and year-end total assets of the Company.

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 43.3						
Gross profitability		24.3%	21.9%	36.9	275	2025-12-31
Return on invested capital		10.4%	9.7%	45.5	100	2025-12-31
Accruals ratio		(6.2%)	(3.6%)	31.9	308	2025-12-31
Gross margin stability, five years		2.6 pts	2.1 pts	58.8	229	2025-12-31
Solvency, sleeve percentile 48.2						
Twelve-month failure probability		not computable	0.04%			latest liabilities, cash plus short-term investments, book equity, and shares are required
Altman Z double-prime		4.34	3.66	35.4	244	2025-12-31
Net debt to EBITDA		2.21x	1.78x	65.0	121	2025-12-31
Interest coverage		not computable	5.09x			latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31
Current ratio		2.37x	2.25x	44.1	325	2025-12-31
Growth and financing, sleeve percentile 58.1						
Revenue growth, three-year compound		9.4%	2.1%	24.3	269	2025-12-31
Free cash flow growth, three-year compound		not computable	13.9%			current FCF must be positive and base FCF must exceed \$100,000
Reinvestment rate		(11.7%)	26.4%	76.8	139	2025-12-31
Asset growth, three years		(0.5%)	4.4%	70.1	279	2025-12-31
Net share issuance, one year		0.3%	0.01%	61.2	243	2026-03-02

Among 255 peers manufacturing; letters are fifths of this list



Rank	Company	Percentile	Letter	Warnings
129	CVD Equipment Corp. (CVV)	50.4	C	fortress balance sheet

130	Woodward, Inc. (WWD)	50.8	C
131	Caterpillar Inc. (CAT)	51.2	C
132	Agco Corp. (AGCO)	51.6	C
133	HNI Corp. (HNI)	52.0	C dilution
134	Gorman Rupp Co. (GRC) <	52.4	C
135	Ouster, Inc. (OUST)	52.8	C fortress balance sheet
136	General Dynamics Corp. (GD)	53.1	C
137	Eastern Co. (EML)	53.5	C
138	Owens Corning (OC)	53.9	C
139	Greenland Technologies Holding Corp. (GTEC)	54.3	C dilution, 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	64.4%	13.7%	83
Distance from 52-week high	(20.4%)	(24.3%)	58
EBIT to enterprise value	4.4%	4.1%	52
Free cash flow yield	4.6%	3.4%	62
Book value to price	0.23	0.34	30
Sales to price	0.35	0.54	32
Composite equity issuance, five years	(9.5%)	(9.5%)	50
Relative strength against the sector, log excess return	0.36	(0.00)	83

Diagnostics

not in the grade

Measure	Value
Piotroski F-score 6 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	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	\$43.6M
Operating cash flow, four quarters	\$119.8M
Months of runway	not finite
Days since last periodic filing	74 (10-Q received Jul 27, 2026)
Median daily dollar volume, 63 sessions	\$12.6M

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	\$209.1M	2025-12-31	2026-03-02	10-K	0001193125-26-084820
2	assets	us-gaap:Assets	\$860.1M	2025-12-31	2026-03-02	10-K	0001193125-26-084820
3	operating income	us-gaap:OperatingIncomeLoss	\$95.4M	2025-12-31	2026-03-02	10-K	0001193125-26-084820
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraordinaryItems	\$16.1M	2025-12-31	2026-03-02	10-K	0001193125-26-084820
5	income tax	us-gaap:IncomeTaxExpenseBenefit	\$16.1M	2025-12-31	2026-03-02	10-K	0001193125-26-084820
6	total debt	us-gaap:LongTermDebt	\$307.5M	2025-12-31	2026-03-02	10-K	0001193125-26-084820
7	book equity	us-gaap:StockholdersEquity	\$414.7M	2025-12-31	2026-03-02	10-K	0001193125-26-084820
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$35.1M	2025-12-31	2026-03-02	10-K	0001193125-26-084820

9	total debt	us-gaap:LongTermDebt	\$366.6M	2024-12-31	2026-03-02	10-K	0001193125-26-084820
10	book equity	us-gaap:StockholdersEquity	\$373.8M	2024-12-31	2026-03-02	10-K	0001193125-26-084820
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$24.2M	2024-12-31	2026-03-02	10-K	0001193125-26-084820
12	net income	us-gaap:NetIncomeLoss	\$53.0M	2025-12-31	2026-03-02	10-K	0001193125-26-084820
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$106.2M	2025-12-31	2026-03-02	10-K	0001193125-26-084820
14	assets	us-gaap:Assets	\$858.5M	2024-12-31	2026-03-02	10-K	0001193125-26-084820
15	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAssessedTax	\$682.4M	2025-12-31	2026-03-02	10-K	0001193125-26-084820
16	gross profit	us-gaap:GrossProfit	\$204.3M	2024-12-31	2026-03-02	10-K	0001193125-26-084820
17	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAssessedTax	\$659.7M	2024-12-31	2026-03-02	10-K	0001193125-26-084820
18	gross profit	us-gaap:GrossProfit	\$196.3M	2023-12-31	2026-03-02	10-K	0001193125-26-084820
19	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAssessedTax	\$659.5M	2023-12-31	2026-03-02	10-K	0001193125-26-084820
20	gross profit	us-gaap:GrossProfit	\$130.9M	2022-12-31	2025-03-03	10-K	0001437749-25-005856
21	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAssessedTax	\$521.0M	2022-12-31	2025-03-03	10-K	0001437749-25-005856
22	gross profit	us-gaap:GrossProfit	\$95.9M	2021-12-31	2024-02-26	10-K	0001437749-24-005519
23	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAssessedTax	\$378.3M	2021-12-31	2024-02-26	10-K	0001437749-24-005519
24	current assets	us-gaap:AssetsCurrent	\$233.7M	2025-12-31	2026-03-02	10-K	0001193125-26-084820
25	current liabilities	us-gaap:LiabilitiesCurrent	\$98.6M	2025-12-31	2026-03-02	10-K	0001193125-26-084820
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	\$418.5M	2025-12-31	2026-03-02	10-K	0001193125-26-084820
27	liabilities	us-gaap:Liabilities	\$445.3M	2025-12-31	2026-03-02	10-K	0001193125-26-084820
28	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	\$27.7M	2025-12-31	2026-03-02	10-K	0001193125-26-084820
29	operating income	us-gaap:OperatingIncomeLoss	\$87.0M	2023-12-31	2026-03-02	10-K	0001193125-26-084820
30	interest expense	us-gaap:InterestExpense	\$41.3M	2023-12-31	2024-02-26	10-K	0001437749-24-005519
31	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	\$17.4M	2025-12-31	2026-03-02	10-K	0001193125-26-084820
32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$69.8M	2024-12-31	2026-03-02	10-K	0001193125-26-084820
33	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	\$14.3M	2024-12-31	2026-03-02	10-K	0001193125-26-084820
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$98.2M	2023-12-31	2026-03-02	10-K	0001193125-26-084820
35	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	\$20.8M	2023-12-31	2026-03-02	10-K	0001193125-26-084820
36	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$13.7M	2022-12-31	2025-03-03	10-K	0001437749-25-005856
37	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	\$18.0M	2022-12-31	2025-03-03	10-K	0001437749-25-005856
38	current assets	us-gaap:AssetsCurrent	\$220.8M	2024-12-31	2026-03-02	10-K	0001193125-26-084820
39	current liabilities	us-gaap:LiabilitiesCurrent	\$87.5M	2024-12-31	2026-03-02	10-K	0001193125-26-084820
40	assets	us-gaap:Assets	\$890.4M	2023-12-31	2025-03-03	10-K	0001437749-25-005856
41	assets	us-gaap:Assets	\$872.8M	2022-12-31	2024-02-26	10-K	0001437749-24-005519
42	shares outstanding	dei:EntityCommonStockSharesOutstanding	26,312,842	2026-03-02	2026-03-02	10-K	0001193125-26-084820
43	shares outstanding	dei:EntityCommonStockSharesOutstanding	26,227,540	2025-03-03	2025-03-03	10-K	0001437749-25-005856