

Hackett Group, Inc. (HCKT)

Nasdaq; other; SIC 8742, Services-Management Consulting Services; CIK 0001057379

Hackett Group, Inc. HCKT; other	
Grade	A ▼ A B C D E strongest fifth of 336 graded peers percentile 9.6; sampling error 2.6 points; lower is stronger
Rank	33 of 336
Profitability	B + + + + + percentile 34.8
Solvency	B + + + + + percentile 23.6
Growth and financing	B/C + + + + + percentile 42.3
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 \$206.4M
Standard universe	inside revenue above \$1M and assets above \$10M
Warnings	none active; fortress balance sheet not computable: distress
Inputs computable	11 of 14
Graded from	filings received through Feb 27, 2026 224 days before the rescans; latest periodic filing 10-Q received Aug 5, 2026
Last close	\$10.99 2026-10-08; market equity \$273.4M
Price used in grade	None



A, the bull

strongest fifth of its sector;
letters are fifths of the 336
graded peers

Share price, twelve months to the rescans

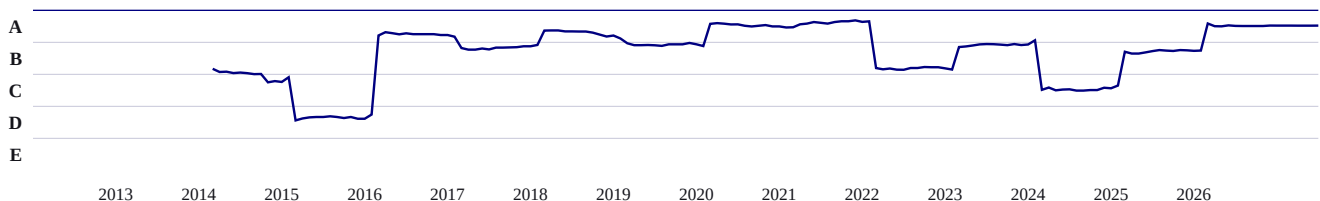
split-adjusted close; the letter is fixed at the rescans that set it



Rescans on file: A/B from Apr 21, 2023, C from Mar 21, 2024, B from Mar 21, 2025, A from Mar 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 Feb 27, 2026

In this Annual Report on Form 10-K, unless the context otherwise requires, "The Hackett Group," "Hackett," the "Company," "we," "us," and "our" refer to The Hackett Group, Inc. and its subsidiaries and predecessors. We were originally incorporated on April 23, 1997. The Hackett Group, Inc. (NASDAQ: HCKT) is a global, IP platform-based generative artificial intelligence ("Gen AI") strategic advisory, business transformation, and enterprise application implementation firm.

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 34.8						
Gross profitability		56.8%	27.1%	13.2	289	2025-12-26
Return on invested capital		not computable	10.0%			latest aligned inputs end 2018-12-28; latest annual assets end 2025-12-26
Accruals ratio		(13.7%)	(5.9%)	18.8	506	2025-12-26
Gross margin stability, five years		4.5 pts	2.2 pts	72.4	204	2025-12-26
Solvency, sleeve percentile 23.6						
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		3.64	2.05	24.4	386	2025-12-26
Net debt to EBITDA		not computable	2.52x			latest aligned inputs end 2018-12-28; latest annual assets end 2025-12-26
Interest coverage		13.71x	2.18x	12.6	88	2025-12-26
Current ratio		1.72x	1.32x	33.7	506	2025-12-26
Growth and financing, sleeve percentile 42.3						
Revenue growth, three-year compound		1.3%	5.1%	63.9	403	2025-12-26
Free cash flow growth, three-year compound		(15.8%)	8.7%	76.3	220	2025-12-26
Reinvestment rate		104.4%	11.9%	14.8	190	2025-12-26
Asset growth, three years		3.7%	4.1%	51.9	438	2025-12-26
Net share issuance, one year		(8.7%)	(0.4%)	4.8	356	2026-02-23

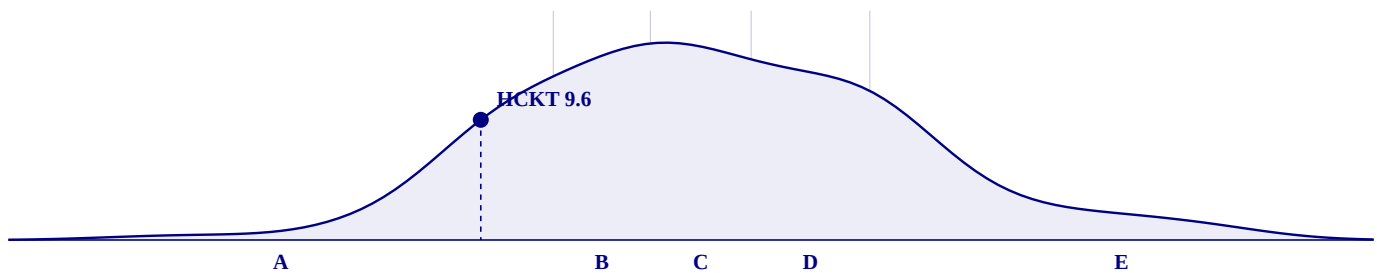
Warnings

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

Check	Measured
Fortress balance sheet	cash minus debt is 7,308,000 USD; Altman Z is not used

Among 336 peers

other; letters are fifths of this list



Rank	Company	Percentile	Letter	Warnings
28	Cavco Industries, Inc. (CVCO)	8.1	A	
29	Moodys Corp. (MCO)	8.4	A	
30	Southern Copper (SCCO)	8.7	A	
31	Legacy Education Inc. (LGCY)	9.0	A	fortress balance sheet
32	Installed Building Products, Inc. (IBP)	9.3	A	
33	Hackett Group, Inc. (HCKT) <	9.6	A	fortress balance sheet
34	Genpact Ltd. (G)	9.9	A	
35	Mastech Digital, Inc. (MHH)	10.1	A	
36	Hecla Mining (HL)	10.6	A	
37	Hecla Mining (HL-PB)	10.6	A	
38	Kforce Inc. (KFRC)	11.0	A	

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	(40.1%)	2.0%	14
Distance from 52-week high	(46.6%)	(26.8%)	24
EBIT to enterprise value	9.0%	4.4%	85
Free cash flow yield	11.9%	4.1%	87
Book value to price	0.25	0.34	38
Sales to price	1.12	0.70	64
Composite equity issuance, five years	(32.0%)	(8.8%)	12
Relative strength against the sector, log excess return	(0.66)	(0.13)	14

Diagnostics

not in the grade

Measure	Value
Piotroski F-score 5 of 9, period end 2025-12-26	
Return on assets above zero	pass
Operating cash flow above zero	pass
Return on assets improved	fail
Operating cash flow exceeds net income	pass
Long-term leverage fell	fail
Current ratio improved	pass
No new shares issued	pass
Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	\$14.2M
Operating cash flow, four quarters	\$40.6M
Months of runway	not finite
Days since last periodic filing	65 (10-Q received Aug 5, 2026)
Median daily dollar volume, 63 sessions	\$2.4M

Sources

each row links to the filing index on sec.gov

#	Concept	XBRL tag	Value	Period end	Received	Form	Accession
1	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$305.6M	2025-12-26	2026-02-27	10-K	0001193125-26-082863
2	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	\$188.5M	2025-12-26	2026-02-27	10-K	0001193125-26-082863
3	assets	us-gaap:Assets	\$206.4M	2025-12-26	2026-02-27	10-K	0001193125-26-082863
4	operating income	us-gaap:OperatingIncomeLoss	\$33.6M	2018-12-28	2021-03-12	10-K	0001564590-21-012796
5	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraord	\$32.9M	2018-12-28	2021-03-12	10-K	0001564590-21-012796
6	income tax	us-gaap:IncomeTaxExpenseBenefit	\$5.6M	2018-12-28	2021-03-12	10-K	0001564590-21-012796

7	total debt	us-gaap:LongTermDebt	\$6.5M	2018-12-28	2020-03-05	10-K	0001564590-20-008982
8	book equity	us-gaap:StockholdersEquity	\$123.6M	2018-12-28	2022-03-04	10-K	0001564590-22-008703
9	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$13.8M	2018-12-28	2020-03-05	10-K	0001564590-20-008982
10	total debt	us-gaap:LongTermDebt	\$19.0M	2017-12-29	2019-03-08	10-K	0001564590-19-007043
11	book equity	us-gaap:StockholdersEquity	\$107.3M	2017-12-29	2021-03-12	10-K	0001564590-21-012796
12	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$17.5M	2017-12-29	2019-03-08	10-K	0001564590-19-007043
13	net income	us-gaap:NetIncomeLoss	\$12.9M	2025-12-26	2026-02-27	10-K	0001193125-26-082863
14	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$40.3M	2025-12-26	2026-02-27	10-K	0001193125-26-082863
15	assets	us-gaap:Assets	\$193.3M	2024-12-27	2026-02-27	10-K	0001193125-26-082863
16	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$313.9M	2024-12-27	2026-02-27	10-K	0001193125-26-082863
17	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	\$190.6M	2024-12-27	2026-02-27	10-K	0001193125-26-082863
18	gross profit	us-gaap:GrossProfit	\$84.4M	2023-12-29	2024-03-01	10-K	0000950170-24-023702
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$296.6M	2023-12-29	2026-02-27	10-K	0001193125-26-082863
20	gross profit	us-gaap:GrossProfit	\$89.5M	2022-12-30	2024-03-01	10-K	0000950170-24-023702
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$293.7M	2022-12-30	2025-02-28	10-K	0000950170-25-030037
22	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$278.8M	2021-12-31	2024-03-01	10-K	0000950170-24-023702
23	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	\$173.1M	2021-12-31	2024-03-01	10-K	0000950170-24-023702
24	current assets	us-gaap:AssetsCurrent	\$83.9M	2025-12-26	2026-02-27	10-K	0001193125-26-082863
25	current liabilities	us-gaap:LiabilitiesCurrent	\$48.8M	2025-12-26	2026-02-27	10-K	0001193125-26-082863
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	\$78.4M	2025-12-26	2026-02-27	10-K	0001193125-26-082863
27	operating income	us-gaap:OperatingIncomeLoss	\$23.5M	2025-12-26	2026-02-27	10-K	0001193125-26-082863
28	book equity	us-gaap:StockholdersEquity	\$68.1M	2025-12-26	2026-02-27	10-K	0001193125-26-082863
29	liabilities	us-gaap:Liabilities	\$138.3M	2025-12-26	2026-02-27	10-K	0001193125-26-082863
30	depreciation amortization	us-gaap:Depreciation	\$2.5M	2018-12-28	2021-03-12	10-K	0001564590-21-012796
31	interest expense	us-gaap:InterestExpense	\$1.7M	2025-12-26	2026-02-27	10-K	0001193125-26-082863
32	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$7.9M	2025-12-26	2026-02-27	10-K	0001193125-26-082863
33	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$47.7M	2024-12-27	2026-02-27	10-K	0001193125-26-082863
34	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$4.1M	2024-12-27	2026-02-27	10-K	0001193125-26-082863
35	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$37.4M	2023-12-29	2026-02-27	10-K	0001193125-26-082863
36	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$4.1M	2023-12-29	2026-02-27	10-K	0001193125-26-082863
37	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$58.9M	2022-12-30	2025-02-28	10-K	0000950170-25-030037
38	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$4.7M	2022-12-30	2025-02-28	10-K	0000950170-25-030037
39	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	\$5.2M	2025-12-26	2026-02-27	10-K	0001193125-26-082863
40	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraordinaryItemsDeductibleItems	\$11.4M	2025-12-26	2026-02-27	10-K	0001193125-26-082863
41	income tax	us-gaap:IncomeTaxExpenseBenefit	\$8.9M	2025-12-26	2026-02-27	10-K	0001193125-26-082863
42	current assets	us-gaap:AssetsCurrent	\$76.3M	2024-12-27	2026-02-27	10-K	0001193125-26-082863
43	current liabilities	us-gaap:LiabilitiesCurrent	\$53.1M	2024-12-27	2026-02-27	10-K	0001193125-26-082863
44	assets	us-gaap:Assets	\$181.4M	2023-12-29	2025-02-28	10-K	0000950170-25-030037
45	assets	us-gaap:Assets	\$185.0M	2022-12-30	2024-03-01	10-K	0000950170-24-023702
46	shares outstanding	dei:EntityCommonStockSharesOutstanding	25,380,429	2026-02-23	2026-02-27	10-K	0001193125-26-082863
47	shares outstanding	dei:EntityCommonStockSharesOutstanding	27,791,221	2025-02-24	2025-02-28	10-K	0000950170-25-030037