

Kforce Inc. (KFRC)

NYSE; other; SIC 7363, Services-Help Supply Services; CIK 0000930420

Kforce Inc. KFRC; other	
Grade	A ▼ A B C D E strongest fifth of 336 graded peers percentile 11.0; sampling error 2.6 points; lower is stronger
Rank	38 of 336
Profitability	A/B percentile 18.6
Solvency	A/B percentile 18.7
Growth and financing	D percentile 66.6
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 \$365.6M
Standard universe	inside revenue above \$1M and assets above \$10M
Warnings	none active not computable: distress, fortress balance sheet
Inputs computable	10 of 14
Graded from	filings received through Feb 20, 2026 231 days before the rescans; latest periodic filing 10-Q received Jul 29, 2026
Last close	\$52.08 2026-10-08; market equity \$932.7M
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

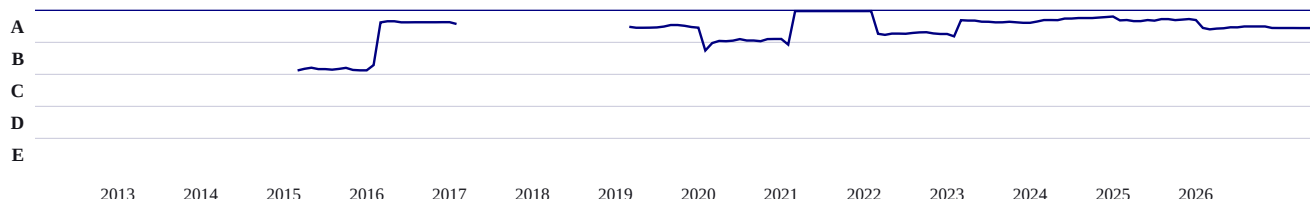
split-adjusted close; the letter is fixed at the rescans that set it



Rescans on file: A from Mar 21, 2019, B from Feb 21, 2020, A/B from Mar 21, 2020, A from Mar 21, 2020

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 20, 2026

Kforce Inc., along with its subsidiaries (collectively, "Kforce"), is a solutions firm specializing in technology, finance and accounting, and other professional staffing services. Through our KNOWLEDGEforce®, we help industry-leading companies realize their digital transformation initiatives. We assemble and deploy teams of skilled technical experts who design and deliver solutions tailored to the unique requirements of each client. These scalable and flexible solutions are shaped by our deep market insight, thought leadership

and broad experience across multiple industries.

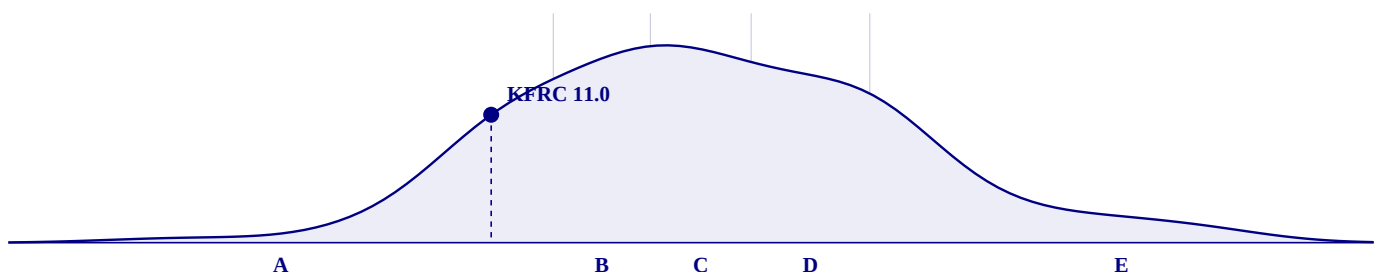
The fourteen inputs

lower percentile is stronger; equal-weighted sleeves

Input	Percentile, 0 to 100	Value	Peer median	Percentile	Peers	Period end
Profitability, sleeve percentile 18.6						
Gross profitability		98.8%	27.1%	1.4	289	2025-12-31
Return on invested capital		not computable	10.0%			one or more required annual facts are missing
Accruals ratio		(7.4%)	(5.9%)	39.6	506	2025-12-31
Gross margin stability, five years		0.8 pts	2.2 pts	14.8	204	2025-12-31
Solvency, sleeve percentile 18.7						
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		7.97	2.05	5.7	386	2025-12-31
Net debt to EBITDA		not computable	2.52x			one or more required annual facts are missing
Interest coverage		not computable	2.18x			latest aligned inputs end 2015-12-31; latest annual assets end 2025-12-31
Current ratio		1.78x	1.32x	31.7	506	2025-12-31
Growth and financing, sleeve percentile 66.6						
Revenue growth, three-year compound		(8.1%)	5.1%	86.6	403	2025-12-31
Free cash flow growth, three-year compound		(17.3%)	8.7%	79.0	220	2025-12-31
Reinvestment rate		(40.7%)	11.9%	75.1	190	2025-12-31
Asset growth, three years		(2.3%)	4.1%	75.3	438	2025-12-31
Net share issuance, one year		(4.4%)	(0.4%)	16.9	356	2026-02-13

Among 336 peers

other; letters are fifths of this list



Rank	Company	Percentile	Letter	Warnings
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
39	Gartner Inc. (IT)	11.3	A
40	Saia Inc. (SAIA)	11.6	A
41	Bowman Consulting Group Ltd. (BWMN)	11.9	A
42	OLD Dominion Freight Line, Inc. (ODFL)	12.2	A fortress balance sheet
43	UL Solutions Inc. (ULS)	12.5	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	97.5%	2.0%	96
Distance from 52-week high	(13.4%)	(26.8%)	73
EBIT to enterprise value	not computable	4.4%	
Free cash flow yield	5.0%	4.1%	56
Book value to price	0.13	0.34	22
Sales to price	1.42	0.70	71
Composite equity issuance, five years	(35.8%)	(8.8%)	9
Relative strength against the sector, log excess return	0.53	(0.13)	96

Diagnostics

not in the grade

Measure	Value
Piotroski F-score None of 9, period end 2025-12-31	
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	fail
No new shares issued	pass
Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	\$330,000
Operating cash flow, four quarters	\$36.3M
Months of runway	not finite
Days since last periodic filing	72 (10-Q received Jul 29, 2026)
Median daily dollar volume, 63 sessions	\$12.4M

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	\$361.4M	2025-12-31	2026-02-20	10-K	0000930420-26-000007
2	assets	us-gaap:Assets	\$365.6M	2025-12-31	2026-02-20	10-K	0000930420-26-000007
3	net income	us-gaap:NetIncomeLoss	\$34.8M	2025-12-31	2026-02-20	10-K	0000930420-26-000007
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$61.6M	2025-12-31	2026-02-20	10-K	0000930420-26-000007
5	assets	us-gaap:Assets	\$357.8M	2024-12-31	2026-02-20	10-K	0000930420-26-000007
6	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$1.3B	2025-12-31	2026-02-20	10-K	0000930420-26-000007
7	gross profit	us-gaap:GrossProfit	\$385.4M	2024-12-31	2026-02-20	10-K	0000930420-26-000007
8	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$1.4B	2024-12-31	2026-02-20	10-K	0000930420-26-000007
9	gross profit	us-gaap:GrossProfit	\$427.1M	2023-12-31	2026-02-20	10-K	0000930420-26-000007
10	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$1.5B	2023-12-31	2026-02-20	10-K	0000930420-26-000007

11	gross profit	us-gaap:GrossProfit	\$501.1M	2022-12-31	2025-02-21	10-K	0000930420-25-000022
12	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$1.7B	2022-12-31	2025-02-21	10-K	0000930420-25-000022
13	gross profit	us-gaap:GrossProfit	\$456.9M	2021-12-31	2024-02-23	10-K	0000930420-24-000019
14	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$1.6B	2021-12-31	2024-02-23	10-K	0000930420-24-000019
15	current assets	us-gaap:AssetsCurrent	\$202.3M	2025-12-31	2026-02-20	10-K	0000930420-26-000007
16	current liabilities	us-gaap:LiabilitiesCurrent	\$113.7M	2025-12-31	2026-02-20	10-K	0000930420-26-000007
17	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	\$552.2M	2025-12-31	2026-02-20	10-K	0000930420-26-000007
18	operating income	us-gaap:OperatingIncomeLoss	\$50.1M	2025-12-31	2026-02-20	10-K	0000930420-26-000007
19	book equity	us-gaap:StockholdersEquity	\$124.6M	2025-12-31	2026-02-20	10-K	0000930420-26-000007
20	liabilities	us-gaap:Liabilities	\$241.0M	2025-12-31	2026-02-20	10-K	0000930420-26-000007
21	operating income	us-gaap:OperatingIncomeLoss	\$74.2M	2015-12-31	2018-02-23	10-K	0000930420-18-000047
22	interest expense	us-gaap:InterestExpense	\$2.0M	2015-12-31	2016-02-26	10-K	0000930420-16-000355
23	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$14.8M	2025-12-31	2026-02-20	10-K	0000930420-26-000007
24	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$86.9M	2024-12-31	2026-02-20	10-K	0000930420-26-000007
25	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$7.6M	2024-12-31	2026-02-20	10-K	0000930420-26-000007
26	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$91.5M	2023-12-31	2026-02-20	10-K	0000930420-26-000007
27	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$7.8M	2023-12-31	2026-02-20	10-K	0000930420-26-000007
28	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$90.8M	2022-12-31	2025-02-21	10-K	0000930420-25-000022
29	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$8.1M	2022-12-31	2025-02-21	10-K	0000930420-25-000022
30	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	\$5.5M	2025-12-31	2026-02-20	10-K	0000930420-26-000007
31	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraord	\$46.9M	2025-12-31	2026-02-20	10-K	0000930420-26-000007
32	income tax	us-gaap:IncomeTaxExpenseBenefit	\$12.1M	2025-12-31	2026-02-20	10-K	0000930420-26-000007
33	current assets	us-gaap:AssetsCurrent	\$225.4M	2024-12-31	2026-02-20	10-K	0000930420-26-000007
34	current liabilities	us-gaap:LiabilitiesCurrent	\$112.5M	2024-12-31	2026-02-20	10-K	0000930420-26-000007
35	assets	us-gaap:Assets	\$358.0M	2023-12-31	2025-02-21	10-K	0000930420-25-000022
36	assets	us-gaap:Assets	\$392.0M	2022-12-31	2024-02-23	10-K	0000930420-24-000019
37	shares outstanding	dei:EntityCommonStockSharesOutstanding	18,278,000	2026-02-13	2026-02-20	10-K	0000930420-26-000007
38	shares outstanding	dei:EntityCommonStockSharesOutstanding	19,111,000	2025-02-14	2025-02-21	10-K	0000930420-25-000022