

KEY Tronic Corp. (KTCC)

Nasdaq; business equipment; SIC 3672, Printed Circuit Boards; CIK 0000719733

KEY Tronic Corp.

KTCC; business equipment

Grade	D fourth fifth of 497 graded peers percentile 63.3; sampling error 2.2 points; lower is stronger
Rank	315 of 497
Profitability	B/C percentile 37.8
Solvency	C percentile 42.6
Growth and financing	D/E percentile 78.0
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 \$299.8M
Standard universe	inside revenue above \$1M and assets above \$10M
Warnings	none active not computable: distress
Inputs computable	7 of 14
Graded from	filings received through Sep 24, 2026 15 days before the rescans; latest periodic filing 10-K received Sep 24, 2026
Last close	\$2.19 2026-10-08; market equity \$24.2M
Price used in grade	None



D, the sloth

fourth fifth of its sector; letters are fifths of the 497 graded peers

Share price, twelve months to the rescans

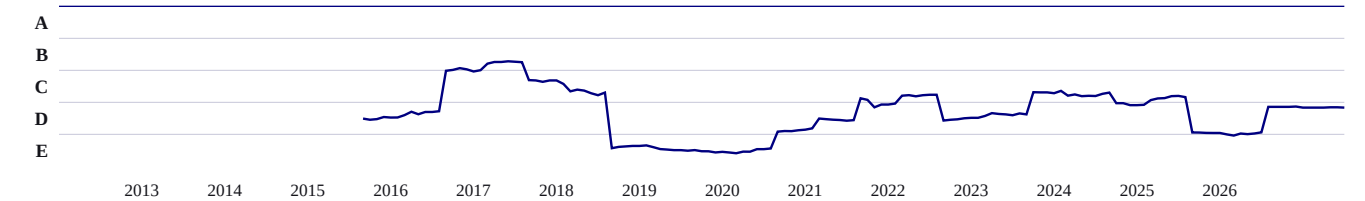
split-adjusted close; the letter is fixed at the rescans that set it



Rescans on file: C/D from Oct 21, 2024, C from Apr 21, 2025, D/E from Sep 21, 2025, D from Sep 24, 2026

Letter at every rescanscan

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 24, 2026

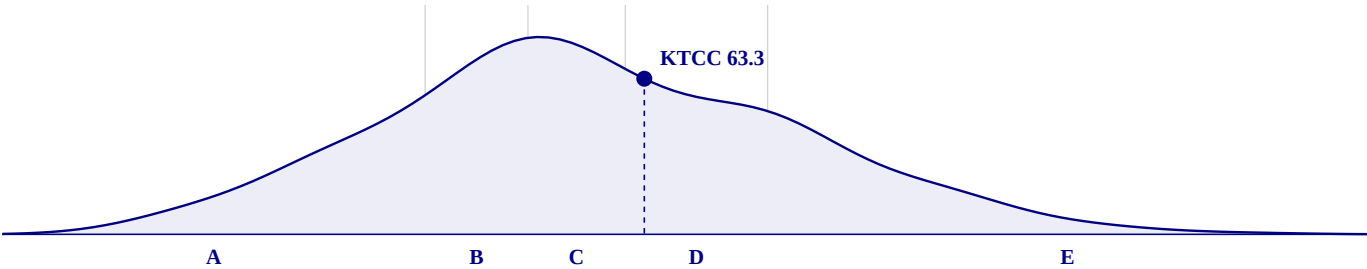
Key Tronic Corporation was organized in 1969, as a Washington corporation that locally manufactured computer keyboards. The ability to design, build and deliver a quality product led us to become a leading independent manufacturer of keyboards for computers in the United States. Our fully integrated design, tooling, and automated manufacturing capabilities enabled us to rapidly respond to customers' needs for keyboards in production quantities worldwide. We supported our sales growth through the development and

purchase of international manufacturing facilities.

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 37.8						
Gross profitability		8.0%	28.5%	84.0	558	2026-06-27
Return on invested capital		not computable	10.9%			pretax income must exceed the validity floor and imply a 0%-100% tax rate
Accruals ratio		(17.0%)	(7.4%)	23.4	621	2026-06-27
Gross margin stability, five years		0.7 pts	2.4 pts	6.1	429	2026-06-27
Solvency, sleeve percentile 42.6						
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		2.78	2.18	38.6	566	2026-06-27
Net debt to EBITDA		not computable	1.11x			EBITDA must exceed \$100,000
Interest coverage		not computable	3.77x			latest aligned inputs end 2023-07-01; latest annual assets end 2026-06-27
Current ratio		2.10x	2.02x	46.6	666	2026-06-27
Growth and financing, sleeve percentile 78.0						
Revenue growth, three-year compound		(13.9%)	6.4%	89.9	538	2026-06-27
Free cash flow growth, three-year compound		not computable	17.2%			current FCF must be positive and base FCF must exceed \$100,000
Reinvestment rate		not computable	14.3%			pretax income must exceed the validity floor and imply a 0%-100% tax rate
Asset growth, three years		not computable	5.0%			four consecutive annual observations are required
Net share issuance, one year		2.7%	0.5%	66.0	407	2026-09-21



Composite score of every graded peer, smoothed; vertical rules are the letter band edges; stronger to the left.

Rank	Company	Percentile	Letter	Warnings
310	Fastly, Inc. (FSLY)	62.3	D	
311	Teradata Corp. (TDC)	62.5	D	
312	RingCentral, Inc. (RNG)	62.7	D	
313	Alpha & Omega Semiconductor Ltd. (AOSL)	62.9	D	fortress balance sheet
314	Netgear, Inc. (NTGR)	63.1	D	
315	KEY Tronic Corp. (KTCC) <	63.3	D	
316	Marvell Technology, Inc. (MRVL)	63.5	D	
317	Avantor, Inc. (AVTR)	63.7	D	
318	Interlink Electronics Inc. (LINK)	63.9	D	
319	Nortech Systems Inc. (NSYS)	64.1	D	
320	Caci International Inc. (CACI)	64.3	D	

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	(29.7%)	2.2%	23
Distance from 52-week high	(49.1%)	(30.0%)	28
EBIT to enterprise value	(11.4%)	1.5%	15
Free cash flow yield	(8.0%)	2.7%	17
Book value to price	2.88	0.23	97
Sales to price	16.10	0.30	99
Composite equity issuance, five years	2.8%	3.9%	48
Relative strength against the sector, log excess return	(0.64)	(0.26)	23

Diagnostics

not in the grade

Measure	Value
Piotroski F-score 2 of 9, period end 2026-06-27	
Return on assets above zero	fail
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	fail
Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	\$584,000
Operating cash flow, four quarters	\$4.4M
Months of runway	not finite

Days since last periodic filing

15 (10-K received Sep 24, 2026)

Median daily dollar volume, 63 sessions

\$50,321

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	\$23.9M	2026-06-27	2026-09-24	10-K	0000719733-26-000033
2	assets	us-gaap:Assets	\$299.8M	2026-06-27	2026-09-24	10-K	0000719733-26-000033
3	operating income	us-gaap:OperatingIncomeLoss	-\$14.7M	2026-06-27	2026-09-24	10-K	0000719733-26-000033
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraordinaryItemsDeductibleItems	\$14.5M	2026-06-27	2026-09-24	10-K	0000719733-26-000033
5	income tax	us-gaap:IncomeTaxExpenseBenefit	\$23.0M	2026-06-27	2026-09-24	10-K	0000719733-26-000033
6	total debt	us-gaap:LongTermDebt	\$106.2M	2026-06-27	2026-09-24	10-K	0000719733-26-000033
7	book equity	us-gaap:StockholdersEquity	\$69.2M	2026-06-27	2026-09-24	10-K	0000719733-26-000033
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$584,000	2026-06-27	2026-09-24	10-K	0000719733-26-000033
9	total debt	us-gaap:LongTermDebt	\$105.2M	2025-06-28	2025-09-17	10-K	0000719733-25-000086
10	book equity	us-gaap:StockholdersEquity	\$117.1M	2025-06-28	2026-09-24	10-K	0000719733-26-000033
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$1.4M	2025-06-28	2026-09-24	10-K	0000719733-26-000033
12	net income	us-gaap:NetIncomeLoss	-\$47.8M	2026-06-27	2026-09-24	10-K	0000719733-26-000033
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$4.4M	2026-06-27	2026-09-24	10-K	0000719733-26-000033
14	assets	us-gaap:Assets	\$315.9M	2025-06-28	2026-09-24	10-K	0000719733-26-000033
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$386.7M	2026-06-27	2026-09-24	10-K	0000719733-26-000033
16	gross profit	us-gaap:GrossProfit	\$36.4M	2025-06-28	2026-09-24	10-K	0000719733-26-000033
17	revenue	us-gaap:Revenues	\$467.9M	2025-06-28	2025-09-17	10-K	0000719733-25-000086
18	gross profit	us-gaap:GrossProfit	\$39.9M	2024-06-29	2025-09-17	10-K	0000719733-25-000086
19	revenue	us-gaap:Revenues	\$566.9M	2024-06-29	2025-09-17	10-K	0000719733-25-000086
20	gross profit	us-gaap:GrossProfit	\$47.5M	2023-07-01	2024-10-15	10-K	0000719733-24-000113
21	revenue	us-gaap:Revenues	\$605.3M	2023-07-01	2024-10-15	10-K	0000719733-24-000113
22	gross profit	us-gaap:GrossProfit	\$43.2M	2022-07-02	2024-10-15	10-K	0000719733-24-000113
23	revenue	us-gaap:Revenues	\$544.2M	2022-07-02	2024-10-15	10-K	0000719733-24-000113
24	current assets	us-gaap:AssetsCurrent	\$223.8M	2026-06-27	2026-09-24	10-K	0000719733-26-000033
25	current liabilities	us-gaap:LiabilitiesCurrent	\$106.5M	2026-06-27	2026-09-24	10-K	0000719733-26-000033
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	\$20.8M	2026-06-27	2026-09-24	10-K	0000719733-26-000033
27	liabilities	us-gaap:Liabilities	\$230.6M	2026-06-27	2026-09-24	10-K	0000719733-26-000033
28	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	\$10.2M	2026-06-27	2026-09-24	10-K	0000719733-26-000033
29	operating income	us-gaap:OperatingIncomeLoss	\$16.3M	2023-07-01	2024-10-15	10-K	0000719733-24-000113
30	interest expense	us-gaap:InterestExpense	\$10.0M	2023-07-01	2023-09-26	10-K	0000719733-23-000032
31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$6.4M	2026-06-27	2026-09-24	10-K	0000719733-26-000033
32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$18.9M	2025-06-28	2026-09-24	10-K	0000719733-26-000033
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$4.1M	2025-06-28	2026-09-24	10-K	0000719733-26-000033
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$13.8M	2024-06-29	2025-09-17	10-K	0000719733-25-000086
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$4.0M	2024-06-29	2025-09-17	10-K	0000719733-25-000086
36	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-\$11.3M	2023-07-01	2024-10-15	10-K	0000719733-24-000113
37	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$9.8M	2023-07-01	2024-10-15	10-K	0000719733-24-000113
38	current assets	us-gaap:AssetsCurrent	\$234.2M	2025-06-28	2026-09-24	10-K	0000719733-26-000033
39	current liabilities	us-gaap:LiabilitiesCurrent	\$92.0M	2025-06-28	2026-09-24	10-K	0000719733-26-000033
40	assets	us-gaap:Assets	\$355.3M	2024-06-29	2025-09-17	10-K	0000719733-25-000086
41	assets	us-gaap:Assets	\$370.1M	2024-03-30	2024-10-15	10-K	0000719733-24-000113
42	shares outstanding	dei:EntityCommonStockSharesOutstanding	11,065,887	2026-09-21	2026-09-24	10-K	0000719733-26-000033
43	shares outstanding	dei:EntityCommonStockSharesOutstanding	10,773,774	2025-09-08	2025-09-17	10-K	0000719733-25-000086