

Power Solutions International, Inc. (PSIX)

Nasdaq; manufacturing; SIC 3510, Engines & Turbines; CIK 0001137091

Power Solutions International, Inc. PSIX; manufacturing	
Grade	A/B on the A/B boundary of 255 graded peers percentile 18.9; sampling error 3.0 points; lower is stronger
Rank	49 of 255
Profitability	D percentile 66.4
Solvency	B percentile 25.2
Growth and financing	A/B percentile 20.2
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 \$424.7M
Standard universe	inside revenue above \$1M and assets above \$10M
Warnings	none active not computable: dilution, distress
Inputs computable	8 of 14
Graded from	filings received through Apr 30, 2026 162 days before the rescans; latest periodic filing 10-Q received Aug 6, 2026
Last close	\$48.59 2026-10-08; market equity \$1.1B
Price used in grade	None

A/B, the bull
on the A/B boundary 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: D/E from Mar 21, 2024, D from Sep 21, 2024, B 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

Power Solutions International, Inc., incorporated under the laws of the state of Delaware in 2011, designs, engineers, manufactures, markets and sells a broad range of advanced, emission-certified engines and power systems that are powered by a wide variety of clean, alternative fuels, including natural gas, propane, and biofuels, as well as gasoline and diesel options, within the power systems, industrial and transportation end markets. The Company manages the business as a single reportable segment.

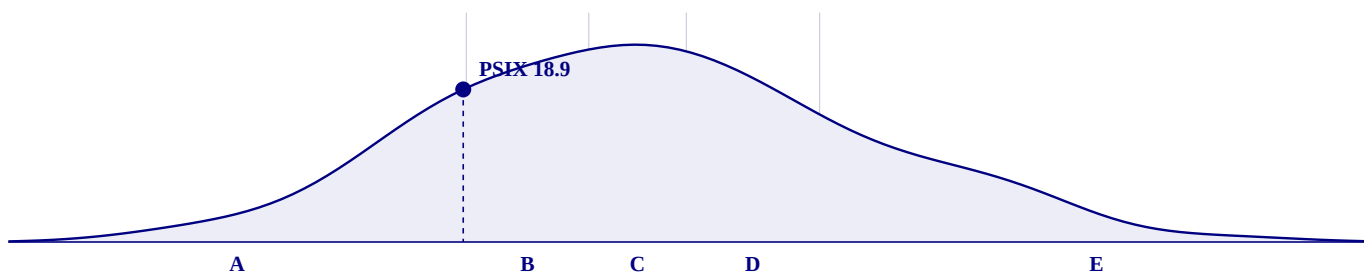
The fourteen inputs

lower percentile is stronger; equal-weighted sleeves

Input	Percentile, 0 to 100	Value	Peer median	Percentile	Peers	Period end
Profitability, sleeve percentile 66.4						
Gross profitability		43.5%	21.9%	8.8	275	2025-12-31
Return on invested capital		not computable	9.7%			pretax income must exceed the validity floor and imply a 0%-100% tax rate
Accruals ratio		23.9%	(3.6%)	100.0	308	2025-12-31
Gross margin stability, five years		7.0 pts	2.1 pts	90.4	229	2025-12-31
Solvency, sleeve percentile 25.2						
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		5.74	3.66	23.9	244	2025-12-31
Net debt to EBITDA		0.49x	1.78x	24.2	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		3.15x	2.25x	27.5	325	2025-12-31
Growth and financing, sleeve percentile 20.2						
Revenue growth, three-year compound		14.5%	2.1%	13.4	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		not computable	26.4%			pretax income must exceed the validity floor and imply a 0%-100% tax rate
Asset growth, three years		9.9%	4.4%	27.0	279	2025-12-31
Net share issuance, one year		not computable	0.01%			prior share count is 56 days earlier

Among 255 peers

manufacturing; 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
44	Kratos Defense & Security Solutions, Inc. (KTOS)	16.9	A	fortress balance sheet
45	Moog Inc. (MOG-A)	17.5	A/B	
46	Moog Inc. (MOG-B)	17.5	A/B	
47	Douglas Dynamics, Inc. (PLOW)	18.1	A/B	
48	Mueller Water Products, Inc. (MWA)	18.5	A/B	
49	Power Solutions International, Inc. (PSIX) <	18.9	A/B	
50	Carpenter Technology Corp. (CRS)	19.3	A/B	
51	Tecnoglass Holdings Inc. (TGLS)	19.7	A/B	
52	Toro Co. (TTC)	20.1	A/B	
53	Miller Industries Inc. (MLR)	20.5	A/B	
54	Taylor Devices, Inc. (TAYD)	20.9	A/B	

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	(63.0%)	13.7%	2
Distance from 52-week high	(50.9%)	(24.3%)	16
EBIT to enterprise value	9.8%	4.1%	90
Free cash flow yield	(2.8%)	3.4%	14
Book value to price	0.18	0.34	23
Sales to price	0.65	0.54	56
Composite equity issuance, five years	not computable	(9.5%)	
Relative strength against the sector, log excess return	(1.13)	(0.00)	2

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	pass
Operating cash flow exceeds net income	fail
Long-term leverage fell	pass
Current ratio improved	pass
No new shares issued	fail
Gross margin improved	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	\$70.1M
Operating cash flow, four quarters	\$74.4M
Months of runway	not finite
Days since last periodic filing	64 (10-Q received Aug 6, 2026)
Median daily dollar volume, 63 sessions	\$13.6M

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	\$184.9M	2025-12-31	2026-03-02	10-K	0001628280-26-013207
2	assets	us-gaap:Assets	\$424.7M	2025-12-31	2026-03-02	10-K	0001628280-26-013207
3	operating income	us-gaap:OperatingIncomeLoss	\$109.7M	2025-12-31	2026-03-02	10-K	0001628280-26-013207
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraordinaryItemsDeductibleItems	\$103.4M	2025-12-31	2026-03-02	10-K	0001628280-26-013207
5	income tax	us-gaap:IncomeTaxExpenseBenefit	-\$10.6M	2025-12-31	2026-03-02	10-K	0001628280-26-013207
6	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	\$96.6M	2025-12-31	2026-03-02	10-K	0001628280-26-013207
7	book equity	us-gaap:StockholdersEquity	\$178.6M	2025-12-31	2026-03-02	10-K	0001628280-26-013207
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$41.2M	2025-12-31	2026-03-02	10-K	0001628280-26-013207
9	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	\$184,000	2024-12-31	2026-03-02	10-K	0001628280-26-013207
10	book equity	us-gaap:StockholdersEquity	\$65.2M	2024-12-31	2026-03-02	10-K	0001628280-26-013207
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$55.3M	2024-12-31	2026-03-02	10-K	0001628280-26-013207
12	net income	us-gaap:NetIncomeLoss	\$114.0M	2025-12-31	2026-03-02	10-K	0001628280-26-013207
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$24.1M	2025-12-31	2026-03-02	10-K	0001628280-26-013207
14	assets	us-gaap:Assets	\$328.2M	2024-12-31	2026-03-02	10-K	0001628280-26-013207
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$722.4M	2025-12-31	2026-03-02	10-K	0001628280-26-013207
16	gross profit	us-gaap:GrossProfit	\$140.5M	2024-12-31	2026-03-02	10-K	0001628280-26-013207
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$476.0M	2024-12-31	2026-03-02	10-K	0001628280-26-013207
18	gross profit	us-gaap:GrossProfit	\$105.9M	2023-12-31	2025-03-24	10-K	0001137091-25-000005
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$459.0M	2023-12-31	2025-03-24	10-K	0001137091-25-000005
20	gross profit	us-gaap:GrossProfit	\$88.6M	2022-12-31	2024-03-14	10-K	0001137091-24-000007
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$481.3M	2022-12-31	2024-03-14	10-K	0001137091-24-000007
22	gross profit	us-gaap:GrossProfit	\$41.3M	2021-12-31	2023-04-14	10-K	0001137091-23-000004
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$456.3M	2021-12-31	2023-04-14	10-K	0001137091-23-000004
24	current assets	us-gaap:AssetsCurrent	\$290.9M	2025-12-31	2026-03-02	10-K	0001628280-26-013207
25	current liabilities	us-gaap:LiabilitiesCurrent	\$92.3M	2025-12-31	2026-03-02	10-K	0001628280-26-013207
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	\$22.5M	2025-12-31	2026-03-02	10-K	0001628280-26-013207
27	liabilities	us-gaap:Liabilities	\$246.1M	2025-12-31	2026-03-02	10-K	0001628280-26-013207
28	depreciation amortization	us-gaap:Depreciation	\$4.2M	2025-12-31	2026-03-02	10-K	0001628280-26-013207
29	operating income	us-gaap:OperatingIncomeLoss	\$44.3M	2023-12-31	2025-03-24	10-K	0001137091-25-000005
30	interest expense	us-gaap:InterestExpense	\$17.1M	2023-12-31	2024-03-14	10-K	0001137091-24-000007
31	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesContinuingOperations	\$23.0M	2015-12-31	2016-02-26	10-K	0001193125-16-482422
32	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	\$8.2M	2015-12-31	2016-02-26	10-K	0001193125-16-482422
33	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesContinuingOperations	\$5.7M	2014-12-31	2016-02-26	10-K	0001193125-16-482422
34	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	\$7.2M	2014-12-31	2016-02-26	10-K	0001193125-16-482422
35	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-\$12.4M	2013-12-31	2014-02-28	10-K	0001193125-14-077913
36	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	\$6.0M	2013-12-31	2016-02-26	10-K	0001193125-16-482422
37	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-\$2.9M	2012-12-31	2014-02-28	10-K	0001193125-14-077913
38	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	\$3.9M	2012-12-31	2015-03-13	10-K	0001193125-15-091420
39	depreciation amortization	us-gaap:Depreciation	\$4.0M	2015-12-31	2019-05-16	10-K	0001137091-19-000016
40	operating income	us-gaap:OperatingIncomeLoss	-\$17.4M	2015-12-31	2019-05-16	10-K	0001137091-19-000016
41	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesMinorityInterestAndIncomeLossFromDiscontinuedOperations	\$13.9M	2015-12-31	2019-02-20	10-K	0001193125-16-482422
42	income tax	us-gaap:IncomeTaxExpenseBenefit	-\$9.7M	2015-12-31	2019-05-16	10-K	0001137091-19-000016
43	current assets	us-gaap:AssetsCurrent	\$249.0M	2015-12-31	2019-05-16	10-K	0001137091-19-000016
44	current liabilities	us-gaap:LiabilitiesCurrent	\$105.9M	2015-12-31	2019-05-16	10-K	0001137091-19-000016
45	current assets	us-gaap:AssetsCurrent	\$202.5M	2014-12-31	2019-05-16	10-K	0001137091-19-000016
46	current liabilities	us-gaap:LiabilitiesCurrent	\$87.6M	2014-12-31	2019-05-16	10-K	0001137091-19-000016
47	assets	us-gaap:Assets	\$284.3M	2023-12-31	2025-03-24	10-K	0001137091-25-000005
48	assets	us-gaap:Assets	\$319.9M	2022-12-31	2024-03-14	10-K	0001137091-24-000007
49	shares outstanding	dei:EntityCommonStockSharesOutstanding	23,050,450	2026-04-23	2026-04-30	10-K/A	0001193125-26-196674
50	shares outstanding	dei:EntityCommonStockSharesOutstanding	23,050,450	2026-02-26	2026-03-02	10-K	0001628280-26-013207