

RBC Bearings Inc. (RBC)

NYSE; manufacturing; SIC 3562, Ball & Roller Bearings; CIK 0001324948

RBC Bearings Inc. RBC; manufacturing	
Grade	C/D A B C D E on the C/D boundary of 255 graded peers percentile 57.9; sampling error 3.0 points; lower is stronger
Rank	148 of 255
Profitability	C/D percentile 60.9
Solvency	B/C percentile 41.8
Growth and financing	C percentile 50.1
Reliability	0.94 AUC filers with over \$2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over \$2.67B assets total assets \$5.1B
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 May 15, 2026 147 days before the rescans; latest periodic filing 10-Q received Jul 31, 2026
Last close	\$491.47 2026-10-08; market equity \$15.6B
Price used in grade	None



C/D, the tortoise
on the C/D boundary of its sector; letters are fifths of the 255 graded peers

Share price, twelve months to the rescans

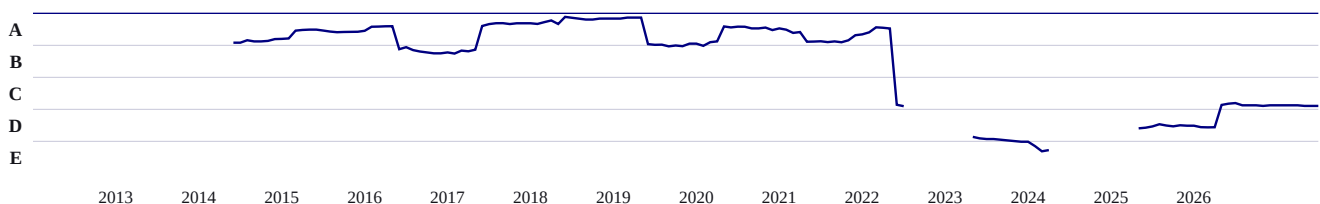
split-adjusted close; the letter is fixed at the rescans that set it



Rescans on file: D from May 21, 2025, C/D from May 21, 2026, C from Jun 21, 2026, C/D from Aug 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 May 15, 2026

Bearings Incorporated, together with its subsidiaries, is an international manufacturer and marketer of highly engineered precision bearings, components and essential systems for the Industrial and Aerospace & Defense markets. Our precision solutions are integral to the manufacture and operation of most machines and mechanical systems, to reduce wear to moving parts, facilitate proper power transmission, reduce damage and energy loss caused by friction, and control pressure and flow. The terms "we," "us," "our," "RBC"

and the "Company" mean RBC Bearings Incorporated and its subsidiaries, unless the context indicates another meaning.

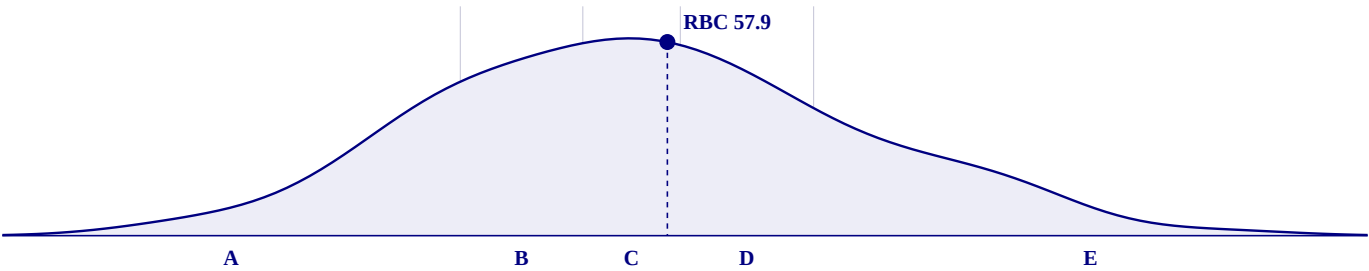
The fourteen inputs

lower percentile is stronger; equal-weighted sleeves

Input	Percentile, 0 to 100	Value	Peer median	Percentile	Peers	Period end
Profitability, sleeve percentile 60.9						
Gross profitability		16.2%	21.9%	67.5	275	2026-03-28
Return on invested capital		8.1%	9.7%	61.6	100	2026-03-28
Accruals ratio		(2.6%)	(3.6%)	59.3	308	2026-03-28
Gross margin stability, five years		2.4 pts	2.1 pts	55.3	229	2026-03-28
Solvency, sleeve percentile 41.8						
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		4.49	3.66	33.7	244	2026-03-28
Net debt to EBITDA		1.75x	1.78x	50.0	121	2026-03-28
Interest coverage		8.45x	5.09x	31.7	64	2026-03-28
Current ratio		2.18x	2.25x	51.9	325	2026-03-28
Growth and financing, sleeve percentile 50.1						
Revenue growth, three-year compound		8.4%	2.1%	26.9	269	2026-03-28
Free cash flow growth, three-year compound		not computable	13.9%			latest aligned inputs end 2023-04-01; latest annual assets end 2026-03-28
Reinvestment rate		not computable	26.4%			latest aligned inputs end 2023-04-01; latest annual assets end 2026-03-28
Asset growth, three years		3.0%	4.4%	55.4	279	2026-03-28
Net share issuance, one year		0.5%	0.01%	68.2	243	2026-05-08

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
143	nVent Electric plc (NVT)	55.9	C	
144	Pentair plc (PNR)	56.3	C	

145	Trio-Tech International (TRT)	56.7	C	fortress
				balance sheet
146	Northern Technologies International Corp. (NTIC)	57.1	C/D	
147	Kaiser Aluminum Corp. (KALU)	57.5	C/D	fortress
				balance sheet
148	RBC Bearings Inc. (RBC) <	57.9	C/D	
149	Steel Dynamics Inc. (STLD)	58.3	C/D	
150	Ingersoll Rand Inc. (IR)	58.7	C/D	
151	FreightCar America, Inc. (RAIL)	59.1	C/D	
152	Nucor Corp. (NUE)	59.4	C/D	
153	Lockheed Martin Corp. (LMT)	59.8	C/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	26.6%	13.7%	62
Distance from 52-week high	(24.3%)	(24.3%)	50
EBIT to enterprise value	2.6%	4.1%	36
Free cash flow yield	1.1%	3.4%	27
Book value to price	0.22	0.34	29
Sales to price	0.12	0.54	7
Composite equity issuance, five years	22.7%	(9.5%)	82
Relative strength against the sector, log excess return	0.10	(0.00)	62

Diagnostics

not in the grade

Measure	Value
Piotroski F-score 6 of 9, period end 2026-03-28	
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	\$124.5M
Operating cash flow, four quarters	\$467.5M
Months of runway	not finite
Days since last periodic filing	70 (10-Q received Jul 31, 2026)
Median daily dollar volume, 63 sessions	\$133.1M

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	\$830.2M	2026-03-28	2026-05-15	10-K	0001213900-26-057626
2	assets	us-gaap:Assets	\$5.1B	2026-03-28	2026-05-15	10-K	0001213900-26-057626
3	operating income	us-gaap:OperatingIncomeLoss	\$421.0M	2026-03-28	2026-05-15	10-K	0001213900-26-057626
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraordinaryItemsDeductibleItems	\$359.3M	2026-03-28	2026-05-15	10-K	0001213900-26-057626
5	income tax	us-gaap:IncomeTaxExpenseBenefit	\$81.7M	2026-03-28	2026-05-15	10-K	0001213900-26-057626
6	total debt	us-gaap:LongTermDebt	\$875.5M	2026-03-28	2026-05-15	10-K	0001213900-26-057626
7	book equity	us-gaap:StockholdersEquity	\$3.4B	2026-03-28	2026-05-15	10-K	0001213900-26-057626
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$57.3M	2026-03-28	2026-05-15	10-K	0001213900-26-057626
9	total debt	us-gaap:LongTermDebt	\$920.1M	2025-03-29	2026-05-15	10-K	0001213900-26-057626
10	book equity	us-gaap:StockholdersEquity	\$3.0B	2025-03-29	2026-05-15	10-K	0001213900-26-057626

11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$36.8M	2025-03-29	2026-05-15	10-K	0001213900-26-057626
12	net income	us-gaap:NetIncomeLoss	\$287.6M	2026-03-28	2026-05-15	10-K	0001213900-26-057626
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$415.7M	2026-03-28	2026-05-15	10-K	0001213900-26-057626
14	assets	us-gaap:Assets	\$4.7B	2025-03-29	2026-05-15	10-K	0001213900-26-057626
15	revenue	us-gaap:Revenues	\$1.9B	2026-03-28	2026-05-15	10-K	0001213900-26-057626
16	gross profit	us-gaap:GrossProfit	\$726.1M	2025-03-29	2026-05-15	10-K	0001213900-26-057626
17	revenue	us-gaap:Revenues	\$1.6B	2025-03-29	2026-05-15	10-K	0001213900-26-057626
18	gross profit	us-gaap:GrossProfit	\$670.5M	2024-03-30	2026-05-15	10-K	0001213900-26-057626
19	revenue	us-gaap:Revenues	\$1.6B	2024-03-30	2026-05-15	10-K	0001213900-26-057626
20	gross profit	us-gaap:GrossProfit	\$604.8M	2023-04-01	2025-05-16	10-K	0001213900-25-044893
21	revenue	us-gaap:Revenues	\$1.5B	2023-04-01	2025-05-16	10-K	0001213900-25-044893
22	gross profit	us-gaap:GrossProfit	\$357.1M	2022-04-30	2022-08-05	10-K/A	0001213900-22-045106
23	revenue	us-gaap:Revenues	\$942.9M	2022-04-30	2022-08-05	10-K/A	0001213900-22-045106
24	current assets	us-gaap:AssetsCurrent	\$1.2B	2026-03-28	2026-05-15	10-K	0001213900-26-057626
25	current liabilities	us-gaap:LiabilitiesCurrent	\$546.2M	2026-03-28	2026-05-15	10-K	0001213900-26-057626
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	\$1.7B	2026-03-28	2026-05-15	10-K	0001213900-26-057626
27	liabilities	us-gaap:Liabilities	\$1.8B	2026-03-28	2026-05-15	10-K	0001213900-26-057626
28	depreciation amortization	us-gaap:Depreciation	\$47.8M	2026-03-28	2026-05-15	10-K	0001213900-26-057626
29	interest expense	us-gaap:InterestExpense	-\$49.8M	2026-03-28	2026-05-15	10-K	0001213900-26-057626
30	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$220.6M	2023-04-01	2025-05-16	10-K	0001213900-25-044893
31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$42.0M	2023-04-01	2023-05-19	10-K	0001213900-23-041600
32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$180.3M	2022-04-02	2024-05-17	10-K	0001213900-24-044761
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$29.8M	2022-04-02	2023-05-19	10-K	0001213900-23-041600
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$152.4M	2021-04-03	2023-05-19	10-K	0001213900-23-041600
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$11.8M	2021-04-03	2023-05-19	10-K	0001213900-23-041600
36	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$155.6M	2020-03-28	2022-08-05	10-K/A	0001213900-22-045106
37	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$37.3M	2020-03-28	2022-08-05	10-K/A	0001213900-22-045106
38	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	\$115.4M	2023-04-01	2024-05-17	10-K	0001213900-24-044761
39	operating income	us-gaap:OperatingIncomeLoss	\$293.0M	2023-04-01	2025-05-16	10-K	0001213900-25-044893
40	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraordinaryItemsDeductibleItems	\$209.7M	2023-04-01	2025-05-16	10-K	0001213900-25-044893
41	income tax	us-gaap:IncomeTaxExpenseBenefit	\$43.0M	2023-04-01	2025-05-16	10-K	0001213900-25-044893
42	current assets	us-gaap:AssetsCurrent	\$913.3M	2023-04-01	2024-05-17	10-K	0001213900-24-044761
43	current liabilities	us-gaap:LiabilitiesCurrent	\$309.3M	2023-04-01	2024-05-17	10-K	0001213900-24-044761
44	current assets	us-gaap:AssetsCurrent	\$962.2M	2022-04-02	2023-05-19	10-K	0001213900-23-041600
45	current liabilities	us-gaap:LiabilitiesCurrent	\$313.5M	2022-04-02	2023-05-19	10-K	0001213900-23-041600
46	assets	us-gaap:Assets	\$4.7B	2024-03-30	2026-05-15	10-K	0001213900-26-057626
47	assets	us-gaap:Assets	\$4.7B	2023-04-01	2025-05-16	10-K	0001213900-25-044893
48	shares outstanding	dei:EntityCommonStockSharesOutstanding	31,635,359	2026-05-08	2026-05-15	10-K	0001213900-26-057626
49	shares outstanding	dei:EntityCommonStockSharesOutstanding	31,478,058	2025-05-09	2025-05-16	10-K	0001213900-25-044893