

Sturm Ruger & Co. Inc. (RGR)

NYSE; manufacturing; SIC 3480, Ordnance & Accessories, (No Vehicles/Guided Missiles); CIK 0000095029

Sturm Ruger & Co. Inc. RGR; manufacturing	
Grade	B A B C D E second fifth of 255 graded peers percentile 31.5; sampling error 3.0 points; lower is stronger
Rank	81 of 255
Profitability	C percentile 47.9
Solvency	A/B percentile 17.9
Growth and financing	D percentile 63.4
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 \$342.0M
Standard universe	inside revenue above \$1M and assets above \$10M
Warnings	none active not computable: distress, fortress balance sheet
Inputs computable	8 of 14
Graded from	filings received through Mar 2, 2026 221 days before the rescans; latest periodic filing 10-Q received Jul 29, 2026
Last close	\$43.64 2026-10-08; market equity \$697.3M
Price used in grade	None



B, the elk

second fifth 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



B

B/C

\$40

\$30

Nov

Jan

Mar

May

Jul

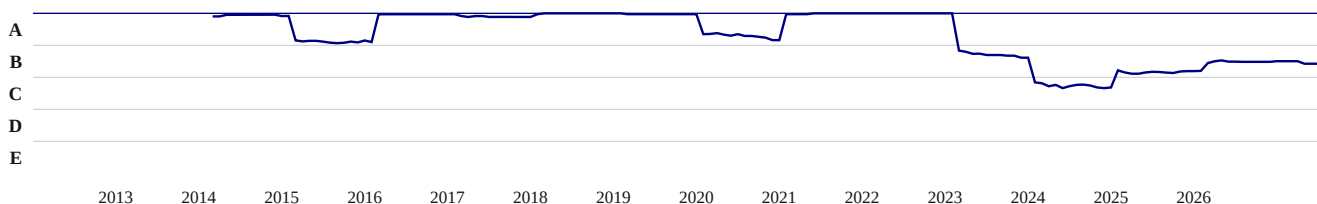
Sep

\$43.61

Rescans on file: B/C from Apr 21, 2025, B from Jun 21, 2025, B/C from Sep 21, 2025

Letter at every rescan

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

(the "Company") is principally engaged in the design, manufacture, and sale of firearms to domestic customers. Virtually all of the Company's sales for the year ended December 31, 2025 were from the firearms segment, with less than 1% from the castings segment. Export sales represent approximately 5% of firearms sales. The Company's design and manufacturing operations are located in the United States and almost all product content is domestic. incorporated in its present form under the laws of Delaware in 1969.

The Company primarily offers products in four industry product categories - rifles, pistols, shotguns, and revolvers.

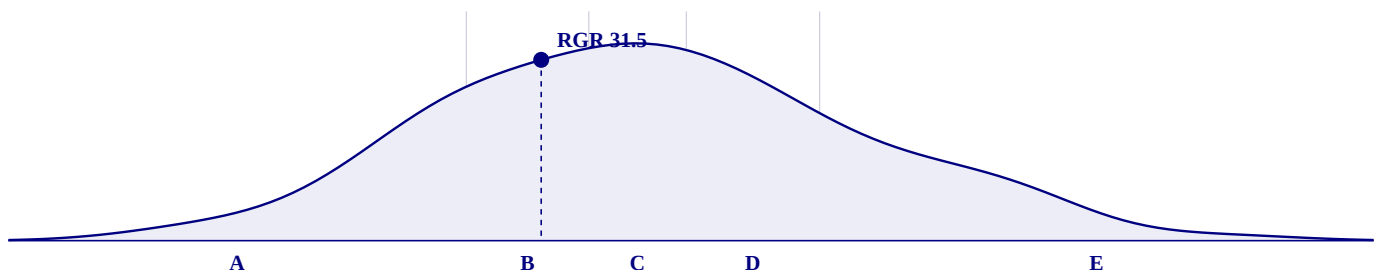
The fourteen inputs

lower percentile is stronger; equal-weighted sleeves

Input	Percentile, 0 to 100	Value	Peer median	Percentile	Peers	Period end
Profitability, sleeve percentile 47.9						
Gross profitability		23.7%	21.9%	39.4	275	2025-12-31
Return on invested capital		not computable	9.7%			one or more required annual facts are missing
Accruals ratio		(16.2%)	(3.6%)	11.7	308	2025-12-31
Gross margin stability, five years		7.9 pts	2.1 pts	92.5	229	2025-12-31
Solvency, sleeve percentile 17.9						
Twelve-month failure probability		not computable	0.04%			liabilities and a nearby cover-page share count are required at 2026-06-27
Altman Z double-prime		not computable	3.66			one or more required annual facts are missing
Net debt to EBITDA		not computable	1.78x			one or more required annual facts are missing
Interest coverage		not computable	5.09x			latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31
Current ratio		3.87x	2.25x	17.9	325	2025-12-31
Growth and financing, sleeve percentile 63.4						
Revenue growth, three-year compound		(2.9%)	2.1%	72.0	269	2025-12-31
Free cash flow growth, three-year compound		(8.1%)	13.9%	85.5	139	2025-12-31
Reinvestment rate		not computable	26.4%			NOPAT must exceed \$100,000
Asset growth, three years		(11.0%)	4.4%	89.9	279	2025-12-31
Net share issuance, one year		(4.9%)	0.01%	6.2	243	2026-02-10

Among 255 peers

manufacturing; letters are fifths of this list



Rank	Company	Percentile	Letter	Warnings
76	Smith & Wesson Brands, Inc. (SWBI)	29.5	B	
77	Mueller Industries Inc. (MLI)	29.9	B	fortress
				balance sheet
78	Core Molding Technologies Inc. (CMT)	30.3	B	fortress
				balance sheet
79	Powell Industries Inc. (POWL)	30.7	B	fortress
				balance sheet
80	Snap-on Inc. (SNA)	31.1	B	fortress
				balance sheet
81	Sturm Ruger & Co. Inc. (RGR) <	31.5	B	
82	Cimpress plc (CMPR)	31.9	B	
83	CPI Card Group Inc. (PMTS)	32.3	B	
84	Aaon, Inc. (AAON)	32.7	B	
85	Kennametal Inc. (KMT)	33.1	B	
86	Forum Energy Technologies, Inc. (FET)	33.5	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	(11.6%)	13.7%	24
Distance from 52-week high	(7.5%)	(24.3%)	90
EBIT to enterprise value	not computable	4.1%	
Free cash flow yield	5.5%	3.4%	74
Book value to price	0.42	0.34	56
Sales to price	0.78	0.54	61
Composite equity issuance, five years	(33.4%)	(9.5%)	9
Relative strength against the sector, log excess return	(0.26)	(0.00)	24

Diagnostics

not in the grade

Measure	Value
Piotroski F-score None of 9, period end 2025-12-31	
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	pass
Gross margin improved	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	\$30.7M
Operating cash flow, four quarters	\$64.5M
Months of runway	not finite
Days since last periodic filing	72 (10-Q received Jul 29, 2026)
Median daily dollar volume, 63 sessions	\$4.6M

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	\$81.2M	2025-12-31	2026-03-02	10-K	0001174947-26-000243
2	assets	us-gaap:Assets	\$342.0M	2025-12-31	2026-03-02	10-K	0001174947-26-000243
3	net income	us-gaap:NetIncomeLoss	-\$4.4M	2025-12-31	2026-03-02	10-K	0001174947-26-000243
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$54.3M	2025-12-31	2026-03-02	10-K	0001174947-26-000243

5	assets	us-gaap:Assets	\$384.0M	2024-12-31	2026-03-02	10-K	0001174947-26-000243
6	revenue	us-gaap:Revenues	\$546.1M	2025-12-31	2026-03-02	10-K	0001174947-26-000243
7	gross profit	us-gaap:GrossProfit	\$114.4M	2024-12-31	2026-03-02	10-K	0001174947-26-000243
8	revenue	us-gaap:Revenues	\$535.6M	2024-12-31	2026-03-02	10-K	0001174947-26-000243
9	gross profit	us-gaap:GrossProfit	\$133.6M	2023-12-31	2026-03-02	10-K	0001174947-26-000243
10	revenue	us-gaap:Revenues	\$543.8M	2023-12-31	2026-03-02	10-K	0001174947-26-000243
11	gross profit	us-gaap:GrossProfit	\$180.1M	2022-12-31	2025-02-19	10-K	0001174947-25-000197
12	revenue	us-gaap:Revenues	\$595.8M	2022-12-31	2025-02-19	10-K	0001174947-25-000197
13	gross profit	us-gaap:GrossProfit	\$279.6M	2021-12-31	2024-02-21	10-K	0001174947-24-000243
14	revenue	us-gaap:Revenues	\$730.7M	2021-12-31	2024-02-21	10-K	0001174947-24-000243
15	operating income	us-gaap:OperatingIncomeLoss	\$52.1M	2023-12-31	2026-03-02	10-K	0001174947-26-000243
16	interest expense	us-gaap:InterestExpense	\$205,000	2023-12-31	2024-02-21	10-K	0001174947-24-000243
17	current assets	us-gaap:AssetsCurrent	\$211.6M	2025-12-31	2026-03-02	10-K	0001174947-26-000243
18	current liabilities	us-gaap:LiabilitiesCurrent	\$54.7M	2025-12-31	2026-03-02	10-K	0001174947-26-000243
19	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$15.8M	2025-12-31	2026-03-02	10-K	0001174947-26-000243
20	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$55.5M	2024-12-31	2026-03-02	10-K	0001174947-26-000243
21	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$20.8M	2024-12-31	2026-03-02	10-K	0001174947-26-000243
22	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$33.9M	2023-12-31	2026-03-02	10-K	0001174947-26-000243
23	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$15.8M	2023-12-31	2026-03-02	10-K	0001174947-26-000243
24	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$77.2M	2022-12-31	2025-02-19	10-K	0001174947-25-000197
25	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$27.7M	2022-12-31	2025-02-19	10-K	0001174947-25-000197
26	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	\$22.9M	2025-12-31	2026-03-02	10-K	0001174947-26-000243
27	operating income	us-gaap:OperatingIncomeLoss	-\$12.3M	2025-12-31	2026-03-02	10-K	0001174947-26-000243
28	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraordinaryItemsDeductibleItems	\$57.2M	2025-12-31	2026-03-02	10-K	0001174947-26-000243
29	income tax	us-gaap:IncomeTaxExpenseBenefit	-\$2.8M	2025-12-31	2026-03-02	10-K	0001174947-26-000243
30	current assets	us-gaap:AssetsCurrent	\$258.4M	2024-12-31	2026-03-02	10-K	0001174947-26-000243
31	current liabilities	us-gaap:LiabilitiesCurrent	\$60.8M	2024-12-31	2026-03-02	10-K	0001174947-26-000243
32	assets	us-gaap:Assets	\$398.8M	2023-12-31	2025-02-19	10-K	0001174947-25-000197
33	assets	us-gaap:Assets	\$484.8M	2022-12-31	2025-02-19	10-K	0001174947-25-000197
34	shares outstanding	dei:EntityCommonStockSharesOutstanding	15,944,300	2026-02-10	2026-03-02	10-K	0001174947-26-000243
35	shares outstanding	dei:EntityCommonStockSharesOutstanding	16,762,100	2025-02-10	2025-02-19	10-K	0001174947-25-000197