

Sifco Industries Inc. (SIF)

NYSE; manufacturing; SIC 3724, Aircraft Engines & Engine Parts; CIK 0000090168

Sifco Industries Inc. SIF; manufacturing	
Grade	E A B C D E weakest fifth of 255 graded peers percentile 84.6; sampling error 3.0 points; lower is stronger
Rank	216 of 255
Profitability	D/E percentile 77.2
Solvency	C percentile 43.9
Growth and financing	D percentile 66.0
Reliability	0.83 AUC filers with \$12.5M to \$120M assets; 95% interval 0.79 to 0.86; 201 events, 2020 to 2025
Peer failure rate	1.07% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	\$12.5M to \$120M assets total assets \$73.4M
Standard universe	inside revenue above \$1M and assets above \$10M
Warnings	none active; fortress balance sheet not computable: short runway, distress
Inputs computable	8 of 14
Graded from	filings received through Dec 22, 2025 291 days before the rescans; latest periodic filing 10-Q received Aug 10, 2026
Last close	\$22.95 2026-10-08; market equity \$143.5M
Price used in grade	None



E, the bear

weakest fifth of its sector;
letters are fifths of the 255
graded peers

Share price, twelve months to the rescans

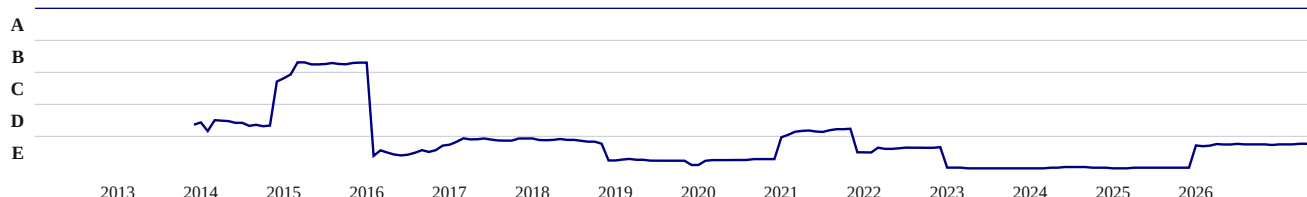
split-adjusted close; the letter is fixed at the rescans that set it



Rescans on file: D from Apr 21, 2021, D/E from Jun 21, 2021, D from Aug 21, 2021, E from Dec 21, 2021

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 Dec 22, 2025

SIFCO Industries, Inc. ("SIFCO," "Company," "we" or "our"), an Ohio corporation, was incorporated in 1916. The executive offices of the Company are located at 970 East 64th Street, Cleveland, Ohio 44103, and its telephone number is (216) 881-8600. SIFCO is engaged in the production of forgings, sub-assemblies, and machined components primarily for the Aerospace and Energy ("A&E") markets. The Company's processes and services include forging, heat-treating, chemical processing and machining. The Company's

operations are conducted in a single business segment.

The fourteen inputs

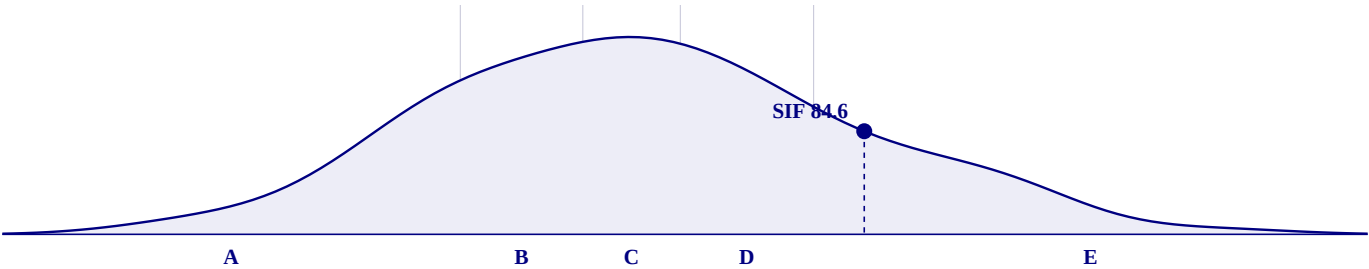
lower percentile is stronger; equal-weighted sleeves

Input	Percentile, 0 to 100	Value	Peer median	Percentile	Peers	Period end
Profitability, sleeve percentile 77.2						
Gross profitability		14.4%	21.9%	73.4	275	2025-09-30
Return on invested capital		not computable	9.7%			prior invested-capital observation is 731 days earlier
Accruals ratio		(1.0%)	(3.6%)	73.6	308	2025-09-30
Gross margin stability, five years		5.2 pts	2.1 pts	84.6	229	2025-09-30
Solvency, sleeve percentile 43.9						
Twelve-month failure probability		not computable	0.04%			liabilities and a nearby cover-page share count are required at 2026-06-30 one or more required annual facts are missing
Altman Z double-prime		not computable	3.66			required annual facts are missing
Net debt to EBITDA		(0.08x)	1.78x	17.5	121	2025-09-30
Interest coverage		not computable	5.09x			latest aligned inputs end 2023-09-30; latest annual assets end 2025-09-30
Current ratio		1.58x	2.25x	70.4	325	2025-09-30
Growth and financing, sleeve percentile 66.0						
Revenue growth, three-year compound		0.4%	2.1%	60.1	269	2025-09-30
Free cash flow growth, three-year compound		not computable	13.9%			current FCF must be positive and base FCF must exceed \$100,000 pretax income must exceed the validity floor and imply a 0%-100% tax rate
Reinvestment rate		not computable	26.4%			
Asset growth, three years		(9.0%)	4.4%	86.3	279	2025-09-30
Net share issuance, one year		0.06%	0.01%	51.7	243	2025-12-05

Warnings

1 of 7 checks triggered; none of them enters the letter

Check	Measured
Fortress balance sheet	cash minus debt is 440,000 USD; Altman Z is not used



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

Rank	Company	Percentile	Letter	Warnings
211	Polaris Inc. (PII)	82.7	D/E	
212	Moving iMAGE Technologies Inc. (MITQ)	83.1	E	fortress balance sheet
213	Millerknoll, Inc. (MLKN)	83.5	E	
214	Hillman Solutions Corp. (HLMN)	83.9	E	
215	O-I Glass, Inc. (OI)	84.3	E	
216	Sifco Industries Inc. (SIF) <	84.6	E	fortress balance sheet
217	Clearwater Paper Corp. (CLW)	85.0	E	
218	MasterCraft Boat Holdings, Inc. (MCFT)	85.4	E	dilution
219	Smurfit Westrock plc (SW)	85.8	E	
220	Worthington Enterprises, Inc. (WOR)	86.2	E	
221	IT Tech Packaging, Inc. (ITP)	86.6	E	late filer, fortress balance sheet

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	232.9%	13.7%	99
Distance from 52-week high	(20.2%)	(24.3%)	59
EBIT to enterprise value	0.1%	4.1%	21
Free cash flow yield	(0.3%)	3.4%	22
Book value to price	0.29	0.34	42
Sales to price	0.60	0.54	54
Composite equity issuance, five years	5.6%	(9.5%)	74
Relative strength against the sector, log excess return	1.07	(0.00)	99

Diagnostics

not in the grade

Measure	Value
Piotroski F-score 5 of 9, period end 2025-09-30	
Return on assets above zero	fail
Operating cash flow above zero	pass
Return on assets improved	pass
Operating cash flow exceeds net income	pass
Long-term leverage fell	fail
Current ratio improved	pass
No new shares issued	fail
Gross margin improved	pass
Asset turnover improved	fail

Cash, filings, liquidity	
Cash and equivalents	\$77,000
Operating cash flow, four quarters	\$4.1M
Months of runway	not finite
Days since last periodic filing	60 (10-Q received Aug 10, 2026)
Median daily dollar volume, 63 sessions	\$1.8M

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	\$10.6M	2025-09-30	2025-12-22	10-K	0001628280-25-058405
2	assets	us-gaap:Assets	\$73.4M	2025-09-30	2025-12-22	10-K	0001628280-25-058405
3	operating income	us-gaap:OperatingIncomeLoss	\$180,000	2025-09-30	2025-12-22	10-K	0001628280-25-058405
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraord	\$738,000	2025-09-30	2025-12-22	10-K	0001628280-25-058405
5	income tax	us-gaap:IncomeTaxExpenseBenefit	\$185,000	2025-09-30	2025-12-22	10-K	0001628280-25-058405
6	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	\$51,000	2025-09-30	2025-12-22	10-K	0001628280-25-058405
7	book equity	us-gaap:StockholdersEquity	\$36.9M	2025-09-30	2025-12-22	10-K	0001628280-25-058405
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$491,000	2025-09-30	2025-12-22	10-K	0001628280-25-058405
9	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	\$2.5M	2023-09-30	2024-01-02	10-K	0000090168-23-000083
10	book equity	us-gaap:StockholdersEquity	\$34.3M	2023-09-30	2025-12-22	10-K	0001628280-25-058405
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$21,000	2023-09-30	2024-12-26	10-K	0000090168-24-000060
12	net income	us-gaap:NetIncomeLoss	-\$729,000	2025-09-30	2025-12-22	10-K	0001628280-25-058405
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesContinuingOperat	\$127,000	2025-09-30	2025-12-22	10-K	0001628280-25-058405
14	assets	us-gaap:Assets	\$104.6M	2024-09-30	2025-12-22	10-K	0001628280-25-058405
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$84.8M	2025-09-30	2025-12-22	10-K	0001628280-25-058405
16	gross profit	us-gaap:GrossProfit	\$6.0M	2024-09-30	2025-12-22	10-K	0001628280-25-058405
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$79.6M	2024-09-30	2025-12-22	10-K	0001628280-25-058405
18	gross profit	us-gaap:GrossProfit	\$3.3M	2023-09-30	2024-12-26	10-K	0000090168-24-000060
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$66.1M	2023-09-30	2024-12-26	10-K	0000090168-24-000060
20	gross profit	us-gaap:GrossProfit	-\$1.9M	2022-09-30	2024-01-02	10-K	0000090168-23-000083
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$83.9M	2022-09-30	2024-01-02	10-K	0000090168-23-000083
22	gross profit	us-gaap:GrossProfit	\$11.2M	2021-09-30	2022-12-23	10-K	0000090168-22-000053
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$99.6M	2021-09-30	2022-12-23	10-K	0000090168-22-000053
24	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	\$5.0M	2025-09-30	2025-12-22	10-K	0001628280-25-058405
25	operating income	us-gaap:OperatingIncomeLoss	-\$9.0M	2023-09-30	2024-12-26	10-K	0000090168-24-000060
26	interest expense	us-gaap:InterestExpense	\$1.3M	2023-09-30	2024-01-02	10-K	0000090168-23-000083
27	current assets	us-gaap:AssetsCurrent	\$35.1M	2025-09-30	2025-12-22	10-K	0001628280-25-058405
28	current liabilities	us-gaap:LiabilitiesCurrent	\$22.2M	2025-09-30	2025-12-22	10-K	0001628280-25-058405
29	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	\$484,000	2025-09-30	2025-12-22	10-K	0001628280-25-058405
30	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesContinuingOperat	\$2.6M	2024-09-30	2025-12-22	10-K	0001628280-25-058405
31	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	\$2.0M	2024-09-30	2025-12-22	10-K	0001628280-25-058405
32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-\$1.4M	2023-09-30	2024-01-02	10-K	0000090168-23-000083
33	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	\$1.1M	2023-09-30	2024-12-26	10-K	0000090168-24-000060
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$298,000	2022-09-30	2024-01-02	10-K	0000090168-23-000083
35	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	\$3.2M	2022-09-30	2024-01-02	10-K	0000090168-23-000083
36	current assets	us-gaap:AssetsCurrent	\$54.3M	2024-09-30	2025-12-22	10-K	0001628280-25-058405
37	current liabilities	us-gaap:LiabilitiesCurrent	\$54.0M	2024-09-30	2025-12-22	10-K	0001628280-25-058405
38	assets	us-gaap:Assets	\$96.3M	2023-09-30	2024-12-26	10-K	0000090168-24-000060
39	assets	us-gaap:Assets	\$97.3M	2022-09-30	2024-01-02	10-K	0000090168-23-000083
40	shares outstanding	dei:EntityCommonStockSharesOutstanding	6,173,688	2025-12-05	2025-12-22	10-K	0001628280-25-058405
41	shares outstanding	dei:EntityCommonStockSharesOutstanding	6,170,051	2024-12-03	2024-12-26	10-K	0000090168-24-000060