

Sono TEK Corp. (SOTK)

Nasdaq; manufacturing; SIC 3559, Special Industry Machinery, NEC; CIK 0000806172

Sono TEK Corp. SOTK; manufacturing	
Grade	A A B C D E strongest fifth of 255 graded peers percentile 0.4; sampling error 3.0 points; lower is stronger
Rank	2 of 255
Profitability	A/B percentile 21.2
Solvency	A percentile 15.9
Growth and financing	B percentile 24.8
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 \$26.4M
Standard universe	inside revenue above \$1M and assets above \$10M
Warnings	none active; fortress balance sheet
Inputs computable	10 of 14
Graded from	filings received through May 28, 2026 134 days before the rescans; latest periodic filing 10-Q received Jul 8, 2026
Last close	\$6.92 2026-10-08; market equity \$108.8M
Price used in grade	None



A, the bull

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

Share price, twelve months to the rescans

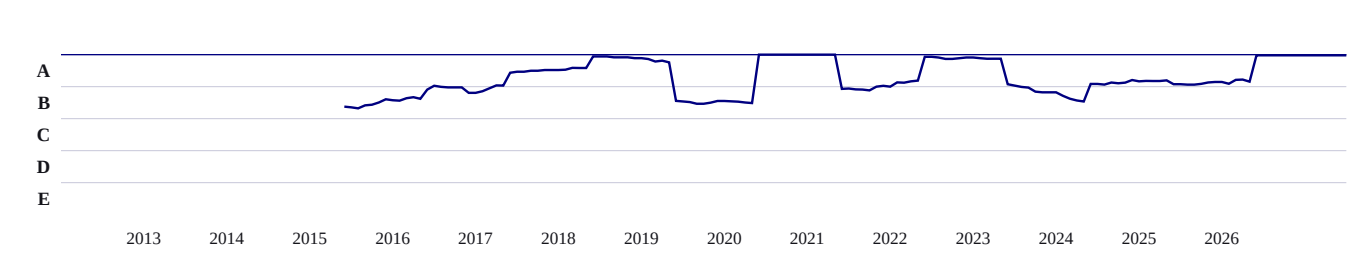
split-adjusted close; the letter is fixed at the rescans that set it



Rescans on file: A/B from Jun 21, 2024, A from Dec 21, 2024, A/B from Jun 21, 2025, A from Mar 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 28, 2026

"We" or "Our") is the world leader in the design and manufacture of ultrasonic coating systems for applying precise, thin film coatings to add functional properties, protect or strengthen surfaces on parts and components for the microelectronics/electronics, alternative energy, medical, industrial and emerging research & development/other markets.

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 21.2						
Gross profitability		40.0%	21.9%	11.3	275	2026-02-28
Return on invested capital		not computable	9.7%			one or more required annual facts are missing
Accruals ratio		(5.8%)	(3.6%)	34.2	308	2026-02-28
Gross margin stability, five years		1.2 pts	2.1 pts	18.0	229	2026-02-28
Solvency, sleeve percentile 15.9						
Twelve-month failure probability		0.03%	0.04%	15.2	34	2026-05-31
Altman Z double-prime		8.78	3.66	10.3	244	2026-02-28
Net debt to EBITDA		not computable	1.78x			latest aligned inputs end 2021-02-28; latest annual assets end 2026-02-28
Interest coverage		not computable	5.09x			interest expense must exceed \$100,000
Current ratio		3.46x	2.25x	22.2	325	2026-02-28
Growth and financing, sleeve percentile 24.8						
Revenue growth, three-year compound		11.6%	2.1%	17.2	269	2026-02-28
Free cash flow growth, three-year compound		57.8%	13.9%	8.0	139	2026-02-28
Reinvestment rate		not computable	26.4%			one or more required annual facts are missing
Asset growth, three years		9.4%	4.4%	27.3	279	2026-02-28
Net share issuance, one year		(0.09%)	0.01%	46.7	243	2026-05-19

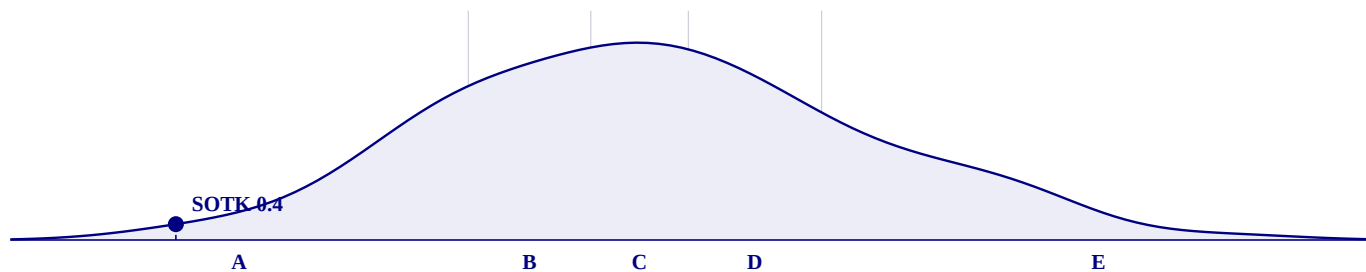
Warnings

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

Check	Measured
Fortress balance sheet	cash minus debt is 3,082,438 USD; Altman Z is not used

Among 255 peers

manufacturing; letters are fifths of this list



Rank	Company	Percentile	Letter	Warnings
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1	Solaris Energy Infrastructure, Inc. (SEI)	0.0	A	fortress
				balance sheet
2	Sono TEK Corp. (SOTK) <	0.4	A	fortress
				balance sheet
3	Xpel, Inc. (XPEL)	0.8	A	fortress
				balance sheet
4	Cactus, Inc. (WHD)	1.2	A	fortress
				balance sheet
5	Deckers Outdoor Corp. (DECK)	1.6	A	
6	Proto Labs Inc. (PRLB)	2.0	A	fortress
				balance sheet
7	Franklin Electric Co. Inc. (FELE)	2.4	A	

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	19.9%	13.7%	55
Distance from 52-week high	0.0%	(24.3%)	98
EBIT to enterprise value	1.8%	4.1%	30
Free cash flow yield	2.8%	3.4%	43
Book value to price	0.19	0.34	25
Sales to price	0.20	0.54	15
Composite equity issuance, five years	not computable	(9.5%)	
Relative strength against the sector, log excess return	0.05	(0.00)	55

Diagnostics

not in the grade

Measure	Value
Piotroski F-score None of 9, period end 2026-02-28	
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	fail
Current ratio improved	pass
No new shares issued	pass
Gross margin improved	pass
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	\$9.0M
Operating cash flow, four quarters	\$6.1M
Months of runway	not finite
Days since last periodic filing	93 (10-Q received Jul 8, 2026)
Median daily dollar volume, 63 sessions	\$212,925

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	2026-02-28	2026-05-28	10-K	0001171520-26-000113
2	assets	us-gaap:Assets	\$26.4M	2026-02-28	2026-05-28	10-K	0001171520-26-000113
3	net income	us-gaap:ProfitLoss	\$1.8M	2026-02-28	2026-05-28	10-K	0001171520-26-000113
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$3.2M	2026-02-28	2026-05-28	10-K	0001171520-26-000113
5	assets	us-gaap:Assets	\$23.4M	2025-02-28	2026-05-28	10-K	0001171520-26-000113
6	revenue	us-gaap:Revenues	\$20.9M	2026-02-28	2026-05-28	10-K	0001171520-26-000113
7	gross profit	us-gaap:GrossProfit	\$9.7M	2025-02-28	2026-05-28	10-K	0001171520-26-000113
8	revenue	us-gaap:Revenues	\$20.5M	2025-02-28	2026-05-28	10-K	0001171520-26-000113
9	gross profit	us-gaap:GrossProfit	\$9.8M	2024-02-29	2025-05-28	10-K	0001171520-25-000195

10	revenue	us-gaap:Revenues	\$19.7M	2024-02-29	2025-05-28	10-K	0001171520-25-000195
11	gross profit	us-gaap:GrossProfit	\$7.7M	2023-02-28	2024-05-23	10-K	0001171520-24-000208
12	revenue	us-gaap:Revenues	\$15.1M	2023-02-28	2024-05-23	10-K	0001171520-24-000208
13	gross profit	us-gaap:GrossProfit	\$8.6M	2022-02-28	2023-05-25	10-K	0001171520-23-000181
14	revenue	us-gaap:Revenues	\$17.1M	2022-02-28	2023-05-25	10-K	0001171520-23-000181
15	current assets	us-gaap:AssetsCurrent	\$22.8M	2026-02-28	2026-05-28	10-K	0001171520-26-000113
16	current liabilities	us-gaap:LiabilitiesCurrent	\$6.6M	2026-02-28	2026-05-28	10-K	0001171520-26-000113
17	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	\$9.4M	2026-02-28	2026-05-28	10-K	0001171520-26-000113
18	operating income	us-gaap:OperatingIncomeLoss	\$1.8M	2026-02-28	2026-05-28	10-K	0001171520-26-000113
19	book equity	us-gaap:StockholdersEquity	\$19.8M	2026-02-28	2026-05-28	10-K	0001171520-26-000113
20	liabilities	us-gaap:Liabilities	\$6.6M	2026-02-28	2026-05-28	10-K	0001171520-26-000113
21	total debt	us-gaap:LongTermDebt	\$1.0M	2021-02-28	2021-05-28	10-K	0001171520-21-000215
22	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$4.1M	2021-02-28	2022-05-24	10-K	0001171520-22-000333
23	operating income	us-gaap:OperatingIncomeLoss	\$1.3M	2021-02-28	2022-05-24	10-K	0001171520-22-000333
24	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	\$463,076	2021-02-28	2022-05-24	10-K	0001171520-22-000333
25	interest expense	us-gaap:InterestExpense	\$39,843	2021-02-28	2022-05-24	10-K	0001171520-22-000333
26	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$224,558	2026-02-28	2026-05-28	10-K	0001171520-26-000113
27	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$525,019	2025-02-28	2026-05-28	10-K	0001171520-26-000113
28	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$468,798	2025-02-28	2026-05-28	10-K	0001171520-26-000113
29	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$1.2M	2024-02-29	2025-05-28	10-K	0001171520-25-000195
30	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$794,690	2024-02-29	2025-05-28	10-K	0001171520-25-000195
31	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$1.3M	2023-02-28	2024-05-23	10-K	0001171520-24-000208
32	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$555,867	2023-02-28	2024-05-23	10-K	0001171520-24-000208
33	assets	us-gaap:Assets	\$23.1M	2024-02-29	2025-05-28	10-K	0001171520-25-000195
34	assets	us-gaap:Assets	\$20.2M	2023-02-28	2024-05-23	10-K	0001171520-24-000208
35	shares outstanding	dei:EntityCommonStockSharesOutstanding	15,713,747	2026-05-19	2026-05-28	10-K	0001171520-26-000113
36	shares outstanding	dei:EntityCommonStockSharesOutstanding	15,727,702	2025-05-23	2025-05-28	10-K	0001171520-25-000195