

Stoneridge Inc. (SRI)

NYSE; consumer durables; SIC 3714, Motor Vehicle Parts & Accessories; CIK 0001043337

Stoneridge Inc. SRI; consumer durables	
Grade	B A B C D E second fifth of 460 graded peers percentile 30.7; sampling error 2.3 points; lower is stronger
Rank	137 of 460
Profitability	B percentile 27.2
Solvency	B percentile 28.1
Growth and financing	D percentile 71.4
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 \$551.2M
Standard universe	inside revenue above \$1M and assets above \$10M
Warnings	late filer not computable: distress
Inputs computable	7 of 14
Graded from	filings received through Mar 16, 2026 207 days before the rescans; latest periodic filing 10-Q received Aug 5, 2026
Last close	\$6.48 2026-10-08; market equity \$184.8M
Price used in grade	None



B, the elk

second fifth of its sector; letters are fifths of the 460 graded peers

Share price, twelve months to the rescans

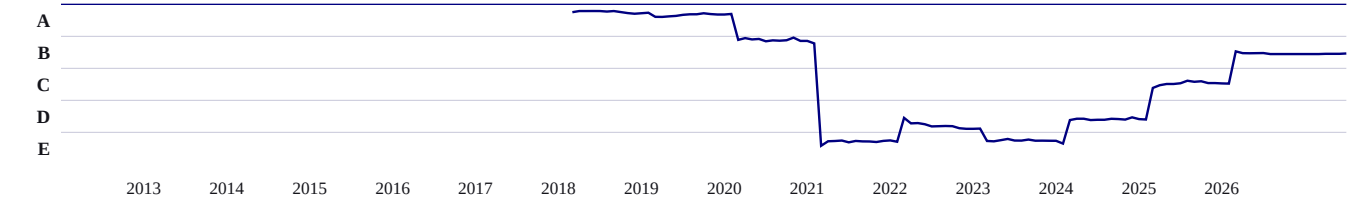
split-adjusted close; the letter is fixed at the rescans that set it



Rescans on file: E from Mar 21, 2023, D from Mar 21, 2024, C from Mar 21, 2025, B from Mar 21, 2026

Letter at every rescanscan

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 16, 2026

Founded in 1965, Stoneridge, Inc. (the "Company") is a global supplier of safe and efficient electronics systems and technologies. Our systems and products power vehicle intelligence, while enabling safety and security for on-and off-highway transportation sectors around the world. Our worldwide footprint is primarily comprised of 21 locations in 14 countries and enables us to supply global commercial, automotive, off-highway, agricultural and other vehicle 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 27.2						
Gross profitability		31.1%	34.4%	52.0	476	2025-12-31
Return on invested capital		not computable	8.9%			pretax income must exceed the validity floor and imply a 0%-100% tax rate
Accruals ratio		(23.3%)	(5.1%)	9.0	525	2025-12-31
Gross margin stability, five years		0.8 pts	1.7 pts	20.7	407	2025-12-31
Solvency, sleeve percentile 28.1						
Twelve-month failure probability		not computable	0.04%			liabilities and a nearby cover-page share count are required at 2026-06-30
Altman Z double-prime		not computable	2.11			one or more required annual facts are missing
Net debt to EBITDA		not computable	2.11x			EBITDA must exceed \$100,000
Interest coverage		not computable	2.57x			latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31
Current ratio		2.30x	1.55x	28.1	541	2025-12-31
Growth and financing, sleeve percentile 71.4						
Revenue growth, three-year compound		(1.5%)	1.4%	62.6	482	2025-12-31
Free cash flow growth, three-year compound		not computable	8.3%			current FCF must be positive and base FCF must exceed \$100,000
Reinvestment rate		not computable	12.0%			pretax income must exceed the validity floor and imply a 0%-100% tax rate
Asset growth, three years		(5.5%)	2.0%	75.7	487	2025-12-31
Net share issuance, one year		1.2%	(0.3%)	75.9	382	2026-03-01

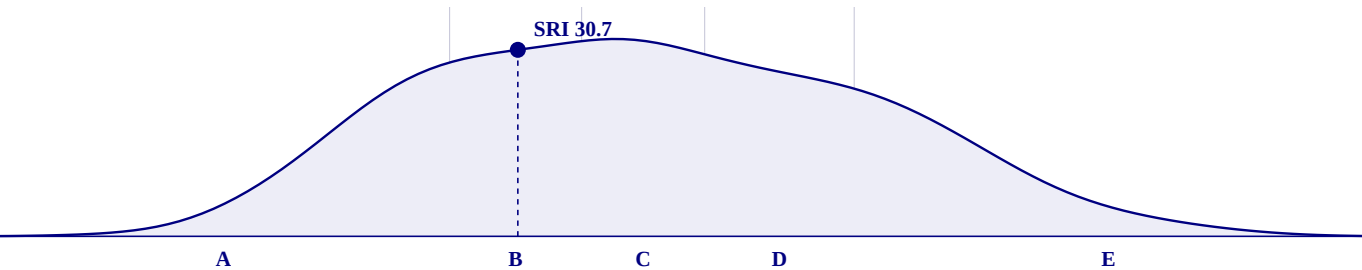
Warnings

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

Check	Measured
Late filer	found 1 NT 10-K/Q filings in the last eight quarters

Among 460 peers

consumer durables; 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
132	Knowles Corp. (KN)	29.4	B	
133	Macy's, Inc. (M)	29.6	B	
134	Ingles Markets Inc. (IMKTA)	30.0	B	late filer
135	Pepsico Inc. (PEP)	30.1	B	
136	GAP Inc. (GAP)	30.4	B	fortress
				balance sheet
137	Stoneridge Inc. (SRI) <	30.7	B	late filer
138	Chefs' Warehouse, Inc. (CHEF)	30.7	B	
139	Acushnet Holdings Corp. (GOLF)	30.9	B	
140	Natural Grocers by Vitamin Cottage, Inc. (NGVC)	31.1	B	
141	Freshpet, Inc. (FRPT)	31.7	B	
142	Biglari Holdings Inc. (BH)	31.7	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	(9.2%)	(0.2%)	37
Distance from 52-week high	(29.2%)	(25.6%)	45
EBIT to enterprise value	(13.1%)	5.0%	17
Free cash flow yield	6.6%	4.6%	61
Book value to price	0.81	0.45	68
Sales to price	4.65	1.49	87
Composite equity issuance, five years	5.5%	(16.0%)	83
Relative strength against the sector, log excess return	(0.07)	(0.01)	42

Diagnostics

not in the grade

Measure	Value
Piotroski F-score 3 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	fail
Gross margin improved	fail
Asset turnover improved	pass
Cash, filings, liquidity	

Cash and equivalents	\$71.5M
Operating cash flow, four quarters	\$13.2M
Months of runway	not finite
Days since last periodic filing	65 (10-Q received Aug 5, 2026)
Median daily dollar volume, 63 sessions	\$942,154

Sources

each row links to the filing index on sec.gov

#	Concept	XBRL tag	Value	Period end	Received	Form	Accession
1	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$861.3M	2025-12-31	2026-03-16	10-K	0001043337-26-000023
2	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	\$690.1M	2025-12-31	2026-03-16	10-K	0001043337-26-000023
3	assets	us-gaap:Assets	\$551.2M	2025-12-31	2026-03-16	10-K	0001043337-26-000023
4	operating income	us-gaap:OperatingIncomeLoss	-\$38.6M	2025-12-31	2026-03-16	10-K	0001043337-26-000023
5	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraord	\$55.5M	2025-12-31	2026-03-16	10-K	0001043337-26-000023
6	income tax	us-gaap:IncomeTaxExpenseBenefit	\$47.4M	2025-12-31	2026-03-16	10-K	0001043337-26-000023
7	total debt	us-gaap:LongTermDebt	\$180.9M	2025-12-31	2026-03-16	10-K	0001043337-26-000023
8	book equity	us-gaap:StockholdersEquity	\$179.8M	2025-12-31	2026-03-16	10-K	0001043337-26-000023
9	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$66.3M	2025-12-31	2026-03-16	10-K	0001043337-26-000023
10	total debt	us-gaap:LongTermDebt	\$201.6M	2024-12-31	2025-03-03	10-K	0001043337-25-000012
11	book equity	us-gaap:StockholdersEquity	\$245.3M	2024-12-31	2026-03-16	10-K	0001043337-26-000023
12	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$71.8M	2024-12-31	2026-03-16	10-K	0001043337-26-000023
13	net income	us-gaap:NetIncomeLoss	-\$102.8M	2025-12-31	2026-03-16	10-K	0001043337-26-000023
14	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$34.0M	2025-12-31	2026-03-16	10-K	0001043337-26-000023
15	assets	us-gaap:Assets	\$621.6M	2024-12-31	2026-03-16	10-K	0001043337-26-000023
16	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$908.3M	2024-12-31	2026-03-16	10-K	0001043337-26-000023
17	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	\$719.0M	2024-12-31	2026-03-16	10-K	0001043337-26-000023
18	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$975.8M	2023-12-31	2026-03-16	10-K	0001043337-26-000023
19	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	\$774.5M	2023-12-31	2026-03-16	10-K	0001043337-26-000023
20	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$899.9M	2022-12-31	2025-03-03	10-K	0001043337-25-000012
21	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	\$725.0M	2022-12-31	2025-03-03	10-K	0001043337-25-000012
22	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$770.5M	2021-12-31	2024-03-01	10-K	0001043337-24-000007
23	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	\$603.6M	2021-12-31	2024-03-01	10-K	0001043337-24-000007
24	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	\$32.5M	2025-12-31	2026-03-16	10-K	0001043337-26-000023
25	operating income	us-gaap:OperatingIncomeLoss	\$12.8M	2023-12-31	2026-03-16	10-K	0001043337-26-000023
26	interest expense	us-gaap:InterestExpense	-\$13.0M	2023-12-31	2024-03-01	10-K	0001043337-24-000007
27	current assets	us-gaap:AssetsCurrent	\$361.9M	2025-12-31	2026-03-16	10-K	0001043337-26-000023
28	current liabilities	us-gaap:LiabilitiesCurrent	\$157.6M	2025-12-31	2026-03-16	10-K	0001043337-26-000023
29	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	\$21.9M	2025-12-31	2026-03-16	10-K	0001043337-26-000023
30	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$47.7M	2024-12-31	2026-03-16	10-K	0001043337-26-000023
31	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	\$24.3M	2024-12-31	2026-03-16	10-K	0001043337-26-000023
32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$4.9M	2023-12-31	2026-03-16	10-K	0001043337-26-000023
33	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	\$38.5M	2023-12-31	2026-03-16	10-K	0001043337-26-000023
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$6.8M	2022-12-31	2025-03-03	10-K	0001043337-25-000012
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$27.2M	2022-12-31	2023-03-02	10-K	0001043337-23-000013
36	current assets	us-gaap:AssetsCurrent	\$387.5M	2024-12-31	2026-03-16	10-K	0001043337-26-000023
37	current liabilities	us-gaap:LiabilitiesCurrent	\$150.0M	2024-12-31	2026-03-16	10-K	0001043337-26-000023
38	assets	us-gaap:Assets	\$679.9M	2023-12-31	2025-03-03	10-K	0001043337-25-000012
39	assets	us-gaap:Assets	\$652.1M	2022-12-31	2024-03-01	10-K	0001043337-24-000007
40	shares outstanding	dei:EntityCommonStockSharesOutstanding	28,016,931	2026-03-01	2026-03-16	10-K	0001043337-26-000023
41	shares outstanding	dei:EntityCommonStockSharesOutstanding	27,695,248	2025-02-26	2025-03-03	10-K	0001043337-25-000012