

Verra Mobility Corp. (VRRM)

Nasdaq; other; SIC 4700, Transportation Services; CIK 0001682745

Verra Mobility Corp.

VRRM; other

Grade

B

A

B

C

D

E

second fifth of 336 graded peers

percentile 31.9; sampling error 2.6 points; lower is stronger

Rank

108 of 336

Profitability

B

percentile 36.9

Solvency

C

percentile 43.2

Growth and financing

C

percentile 46.9

Reliability

0.91 AUC

filers with \$591M to \$2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025

Peer failure rate

1.01% a year

Item 1.03 bankruptcies, same asset band, 2012 to 2025

Size band

\$591M to \$2.67B assets

total assets \$1.6B

Standard universe

inside

revenue above \$1M and assets above \$10M

Warnings

none active

not computable: distress

Inputs computable

10 of 14

Graded from

filings received through Feb 24, 2026

227 days before the rescans; latest periodic filing 10-Q received Aug 5, 2026

Last close

\$2.91

2026-10-08; market equity \$442.3M

Price used in grade

None



B, the elk

second fifth of its sector; letters are fifths of the 336 graded peers

Share price, twelve months to the rescans

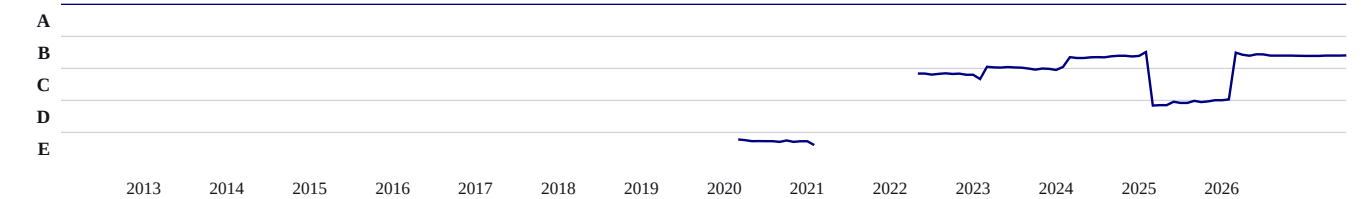
split-adjusted close; the letter is fixed at the rescans that set it



Rescans on file: B from Mar 21, 2024, D from Mar 21, 2025, C/D from Jun 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 Feb 24, 2026

We are a leading provider of smart mobility technology solutions, principally operating throughout the United States, Australia, Europe, and Canada. Our goal is to make transportation safer, smarter, and more connected through our integrated, data-driven solutions, including toll and violations management, title and registration services, automated safety and traffic enforcement, and commercial parking management.

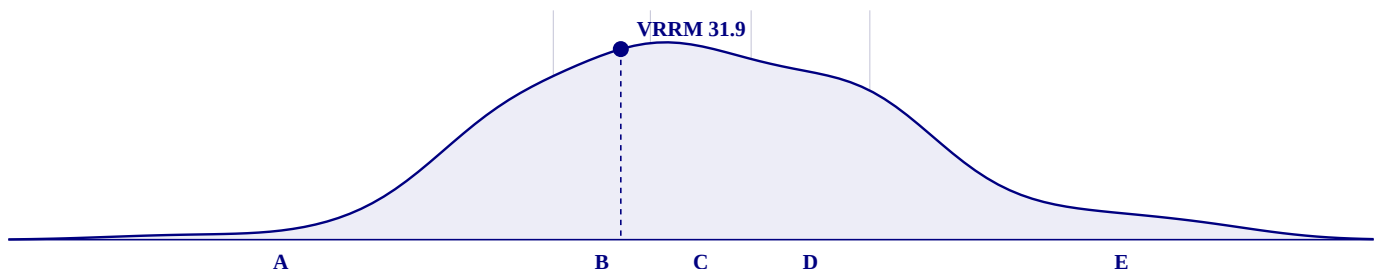
The fourteen inputs

lower percentile is stronger; equal-weighted sleeves

Input	Percentile, 0 to 100	Value	Peer median	Percentile	Peers	Period end
Profitability, sleeve percentile 36.9						
Gross profitability		not computable	27.1%			one or more required annual facts are missing
Return on invested capital		13.5%	10.0%	33.3	151	2025-12-31
Accruals ratio		(7.3%)	(5.9%)	40.4	506	2025-12-31
Gross margin stability, five years		not computable	2.2 pts			five annual gross margins are required; found 0
Solvency, sleeve percentile 43.2						
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		1.64	2.05	46.0	386	2025-12-31
Net debt to EBITDA		2.73x	2.52x	56.8	184	2025-12-31
Interest coverage		not computable	2.18x			latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31
Current ratio		2.09x	1.32x	26.7	506	2025-12-31
Growth and financing, sleeve percentile 46.9						
Revenue growth, three-year compound		9.7%	5.1%	32.3	403	2025-12-31
Free cash flow growth, three-year compound		(7.0%)	8.7%	69.4	220	2025-12-31
Reinvestment rate		24.7%	11.9%	45.0	190	2025-12-31
Asset growth, three years		(2.1%)	4.1%	74.8	438	2025-12-31
Net share issuance, one year		(5.2%)	(0.4%)	13.0	356	2026-02-28

Among 336 peers

other; 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
103	Barrett Business Services Inc. (BBSI)	30.4	B	
104	National CineMedia, Inc. (NCMI)	30.7	B	fortress balance sheet
105	Charles River Laboratories International, Inc. (CRL)	31.0	B	
106	Century Casinos Inc. (CNTY)	31.3	B	late filer

107	Vulcan Materials Co. (VMC)	31.6	B	
108	Verra Mobility Corp. (VRRM) <	31.9	B	
109	Quanta Services, Inc. (PWR)	32.2	B	
110	Brinks Co. (BCO)	32.5	B	
111	Criteo S.A. (CRO)	32.8	B	fortress
				balance sheet
112	Datavault AI Inc. (DVL)	33.1	B	dilution, short
				runway, late
				filer, fortress
				balance sheet
113	Korn Ferry (KFY)	33.4	B	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	(82.1%)	2.0%	3
Distance from 52-week high	(88.2%)	(26.8%)	3
EBIT to enterprise value	16.7%	4.4%	97
Free cash flow yield	30.8%	4.1%	96
Book value to price	0.50	0.34	69
Sales to price	2.21	0.70	81
Composite equity issuance, five years	(6.5%)	(8.8%)	56
Relative strength against the sector, log excess return	(1.87)	(0.13)	3

Diagnostics
not in the grade

Measure	Value
Piotroski F-score None of 9, period end 2025-12-31	
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	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	\$49.6M
Operating cash flow, four quarters	\$214.9M
Months of runway	not finite
Days since last periodic filing	65 (10-Q received Aug 5, 2026)
Median daily dollar volume, 63 sessions	\$17.3M

Sources
each row links to the filing index on sec.gov

#	Concept	XBRL tag	Value	Period end	Received	Form	Accession
1	operating income	us-gaap:OperatingIncomeLoss	\$238.4M	2025-12-31	2026-02-24	10-K	0001193125-26-067293
2	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraord	\$195.0M	2025-12-31	2026-02-24	10-K	0001193125-26-067293
3	income tax	us-gaap:IncomeTaxExpenseBenefit	\$58.3M	2025-12-31	2026-02-24	10-K	0001193125-26-067293
4	total debt	us-gaap:LongTermDebt	\$1.0B	2025-12-31	2026-02-24	10-K	0001193125-26-067293
5	book equity	us-gaap:StockholdersEquity	\$293.0M	2025-12-31	2026-02-24	10-K	0001193125-26-067293
6	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$65.3M	2025-12-31	2026-02-24	10-K	0001193125-26-067293
7	total debt	us-gaap:LongTermDebt	\$1.0B	2024-12-31	2026-02-24	10-K	0001193125-26-067293
8	book equity	us-gaap:StockholdersEquity	\$265.1M	2024-12-31	2026-02-24	10-K	0001193125-26-067293
9	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$77.6M	2024-12-31	2026-02-24	10-K	0001193125-26-067293

10	net income	us-gaap:NetIncomeLoss	\$136.6M	2025-12-31	2026-02-24	10-K	0001193125-26-067293
11	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$255.8M	2025-12-31	2026-02-24	10-K	0001193125-26-067293
12	assets	us-gaap:Assets	\$1.6B	2025-12-31	2026-02-24	10-K	0001193125-26-067293
13	assets	us-gaap:Assets	\$1.6B	2024-12-31	2026-02-24	10-K	0001193125-26-067293
14	current assets	us-gaap:AssetsCurrent	\$440.9M	2025-12-31	2026-02-24	10-K	0001193125-26-067293
15	current liabilities	us-gaap:LiabilitiesCurrent	\$210.5M	2025-12-31	2026-02-24	10-K	0001193125-26-067293
16	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-\$243.8M	2025-12-31	2026-02-24	10-K	0001193125-26-067293
17	liabilities	us-gaap:Liabilities	\$1.4B	2025-12-31	2026-02-24	10-K	0001193125-26-067293
18	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	\$114.1M	2025-12-31	2026-02-24	10-K	0001193125-26-067293
19	operating income	us-gaap:OperatingIncomeLoss	\$188.8M	2023-12-31	2026-02-24	10-K	0001193125-26-067293
20	interest expense	us-gaap:InterestExpense	\$86.7M	2023-12-31	2024-02-29	10-K	0000950170-24-023271
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$979.1M	2025-12-31	2026-02-24	10-K	0001193125-26-067293
22	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$879.2M	2024-12-31	2026-02-24	10-K	0001193125-26-067293
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$817.3M	2023-12-31	2026-02-24	10-K	0001193125-26-067293
24	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$741.6M	2022-12-31	2025-02-27	10-K	0000950170-25-029180
25	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$119.1M	2025-12-31	2026-02-24	10-K	0001193125-26-067293
26	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$223.6M	2024-12-31	2026-02-24	10-K	0001193125-26-067293
27	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$70.9M	2024-12-31	2026-02-24	10-K	0001193125-26-067293
28	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$206.1M	2023-12-31	2026-02-24	10-K	0001193125-26-067293
29	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$57.0M	2023-12-31	2026-02-24	10-K	0001193125-26-067293
30	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$218.3M	2022-12-31	2025-02-27	10-K	0000950170-25-029180
31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$48.2M	2022-12-31	2025-02-27	10-K	0000950170-25-029180
32	current assets	us-gaap:AssetsCurrent	\$394.0M	2024-12-31	2026-02-24	10-K	0001193125-26-067293
33	current liabilities	us-gaap:LiabilitiesCurrent	\$199.7M	2024-12-31	2026-02-24	10-K	0001193125-26-067293
34	assets	us-gaap:Assets	\$1.8B	2023-12-31	2025-02-27	10-K	0000950170-25-029180
35	assets	us-gaap:Assets	\$1.8B	2022-12-31	2024-02-29	10-K	0000950170-24-023271
36	shares outstanding	dei:EntityCommonStockSharesOutstanding	151,361,959	2026-02-28	2026-02-24	10-K	0001193125-26-067293
37	shares outstanding	dei:EntityCommonStockSharesOutstanding	159,593,852	2025-02-28	2025-02-27	10-K	0000950170-25-029180