

InTest Corporation

Fourth Quarter & Fiscal Year 2025 Financial Results Conference Call

February 27, 2026



Nick Grant,
President and CEO



Duncan Gilmour,
CFO and Treasurer

NYSE American: INTT

Forward-Looking Statements and Key Performance Metrics

Forward-Looking Statements

This presentation includes forward-looking statements within the meaning of the Private Securities Litigation Reform Act of 1995, as amended. These statements do not convey historical information but relate to predicted or potential future events and financial results, such as statements of the Company's plans, strategies and intentions, or our future performance or goals, that are based upon management's current expectations. These forward-looking statements can often be identified by the use of forward-looking terminology such as "believe," "continue," "expects," "guidance," "may," "outlook," "opportunities," "potential," "forecasts," "strategy," or similar terminology. These statements are subject to risks and uncertainties that could cause actual results to differ materially from those expressed or implied by such statements. Such risks and uncertainties include, but are not limited to, any mentioned in this presentation as well as the Company's ability to execute on its Vision 2030 Strategy, realize the potential benefits of acquisitions and successfully integrate any acquired operations, grow the Company's presence in its key target and international markets, manage supply chain challenges, convert backlog to sales and to ship product in a timely manner; the success of the Company's strategy to diversify its markets; the impact of inflation on the Company's business and financial condition; indications of a change in the market cycles in the semi market or other markets served; changes in business conditions and general economic conditions both domestically and globally including changes in U.S. and/or foreign trade policy, rising interest rates and fluctuation in foreign currency exchange rates; changes in the demand for semiconductors; access to capital and the ability to borrow funds or raise capital to finance potential acquisitions or for working capital; changes in the rates and timing of capital expenditures by the Company's customers; and other risk factors set forth from time to time in the Company's Securities and Exchange Commission filings, including, but not limited to, the Annual Report on Form 10-K for the year ended December 31, 2024. Any forward-looking statement made by the Company in this presentation is based only on information currently available to management and speaks to circumstances only as of the date on which it is made. The Company undertakes no obligation to update the information in this presentation to reflect events or circumstances after the date hereof or to reflect the occurrence of anticipated or unanticipated events, except as required by law.

Key Performance Metrics

In addition to the non-GAAP measures described on the next slide, management uses orders and backlog as key performance metrics to analyze and measure the Company's financial performance and results of operations. Management uses orders and backlog as measures of current and future business and financial performance, and these may not be comparable with measures provided by other companies. Orders represent written communications received from customers requesting the Company to provide products and/or services. Backlog is calculated based on firm purchase orders we receive for which revenue has not yet been recognized. Management believes tracking orders and backlog are useful as they are often leading indicators of future performance. In accordance with industry practice, contracts may include provisions for cancellation, termination, or suspension at the discretion of the customer. Given that each of orders and backlog are operational measures and that the Company's methodology for calculating orders and backlog does not meet the definition of a non-GAAP measure, as that term is defined by the U.S. Securities and Exchange Commission, a quantitative reconciliation for each is not required or provided.

Non-GAAP Financial Measures

In addition to disclosing results that are determined in accordance with generally accepted accounting practices in the United States ("GAAP"), we also disclose non-GAAP financial measures. These non-GAAP financial measures consist of adjusted net earnings (loss), adjusted earnings (loss) per diluted share ("adjusted EPS"), adjusted EBITDA, adjusted EBITDA margin, and free cash flow. The Company defines these non-GAAP measures as follows:

- Adjusted Net Earnings (Loss) is derived by adding acquired intangible amortization, acquired inventory step-up expense, restructuring costs, and the tax effect of the adjusting items, to net earnings (loss).
- Adjusted Earnings (Loss) per diluted share ("adjusted EPS") is derived by dividing adjusted net earnings (loss) by diluted weighted average shares outstanding.
- Adjusted EBITDA is derived by adding acquired intangible amortization, acquired inventory step-up expense, restructuring costs, net interest expense, income tax expense, depreciation, and stock-based compensation expense to net earnings.
- Adjusted EBITDA Margin is derived by dividing adjusted EBITDA by revenue.
- Free Cash Flow is derived by subtracting capital expenditures from net cash provided by or used in operating activities.

These results are provided as a complement to the results provided in accordance with GAAP. Adjusted net earnings (loss) and adjusted earnings (loss) per diluted share ("adjusted EPS") are non-GAAP financial measures presented to provide investors with meaningful, supplemental information regarding our baseline performance before acquired intangible amortization, restructuring costs, and inventory step-up charges as management believes these expenses may not be indicative of our underlying operating performance. Adjusted EBITDA and adjusted EBITDA margin are non-GAAP financial measures presented primarily as a measure of liquidity as they exclude non-cash charges for acquired intangible amortization, acquired inventory step-up, depreciation and stock-based compensation. In addition, adjusted EBITDA and adjusted EBITDA margin also exclude the impact of restructuring costs, interest income or expense and income tax expense or benefit, as management believes these expenses may not be indicative of our underlying operating performance. Management believes that free cash flow provides meaningful information for evaluating our overall financial performance for comparative periods as it facilitates an assessment of funds available to satisfy current and future obligations and fund acquisitions.

The non-GAAP financial measures presented in this presentation are used by management to make operational decisions, to forecast future operational results, and for comparison with our business plan, historical operating results and the operating results of our peers. Reconciliations from net earnings (loss) and earnings (loss) per diluted share (EPS) to adjusted net earnings (loss) and adjusted earnings (loss) per diluted share ("adjusted EPS") and from net earnings (loss) and net margin to adjusted EBITDA and adjusted EBITDA margin, are contained in the tables below. Management believes these Non-GAAP financial measures are important in evaluating our performance, results of operations, and financial position. We use non-GAAP financial measures to supplement our GAAP results to provide a more complete understanding of the factors and trends affecting our business. Non-GAAP measures as presented in this presentation may differ from and may not be comparable to similarly titled measures used by other companies.

Q4 2025 Beat With Strong Orders⁽¹⁾ and Margin Lift

Gradual Recovery of Customer Capital Spending Evident

- Q4 2025 Orders⁽¹⁾ up 22.2% Y/Y to \$37.5 million
- 12/31/25 Backlog⁽¹⁾ of \$53.9 million, up 36.4% from 12/31/24

Q4 Revenue Exceeded Guidance Range

- Q/Q strength in Industrial, Defense/Aerospace and Life Sciences
- Guidance included ~\$2.0 million in shipments which slipped out of Q3

Gross Margin Lift

- Positive impact from manufacturing efficiency initiatives
- Higher sales of new products from Alfamation and Acculogic
- Achieved without significant contribution from Semi

Continued Execution of VISION 2030

- We believe ongoing market diversification and new product momentum position InTest for sustainable, profitable growth

(1) Orders and Backlog are key performance metrics. Further information can be found under "Key Performance Metrics."

5-POINT OPERATING SYSTEM



Orders and Backlog⁽¹⁾

(\$ in millions)

Orders maintain strong momentum

Second Consecutive \$37M+ Order Quarter

- Lower Auto/EV, Industrial and Defense/Aerospace orders were offset by increases in Life Sciences and Semi
- Life Sciences strengthened by new product orders at Alfamation
- New order strength reflects auto demand and acceptance of new products

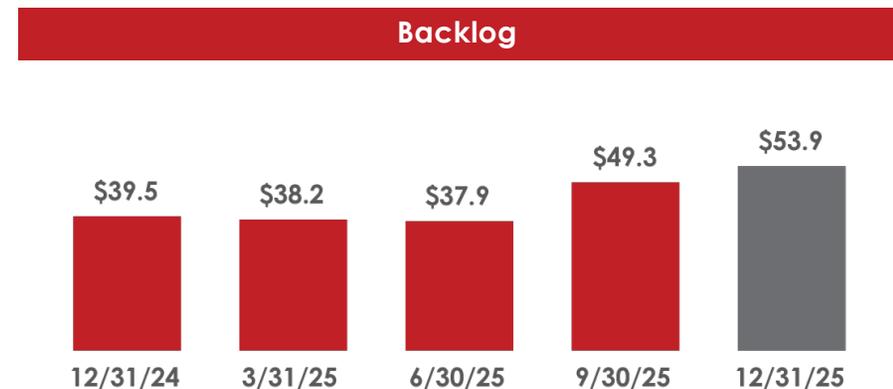
Q4 2025 orders up 22.2% Y/Y

- Strength in Auto/EV, Life Sciences, Defense/Aerospace, Safety/Security partially offset the decline in Semi

Backlog up 9.4% sequentially, 36.4% Y/Y

- Approximately 60% of backlog is expected to ship beyond Q1 2026

(1) Orders and Backlog are key performance metrics. Further information can be found under "Key Performance Metrics."



Revenue

(\$ in millions)

Revenue up \$6.6 million sequentially

- Gradual recovery of capital spending
- New products gaining traction
- Increases in Industrial, Defense/Aerospace and Life Sciences offset by continued weakness in Semi
- Includes ~\$2.0 million in shipments which slipped out of Q3

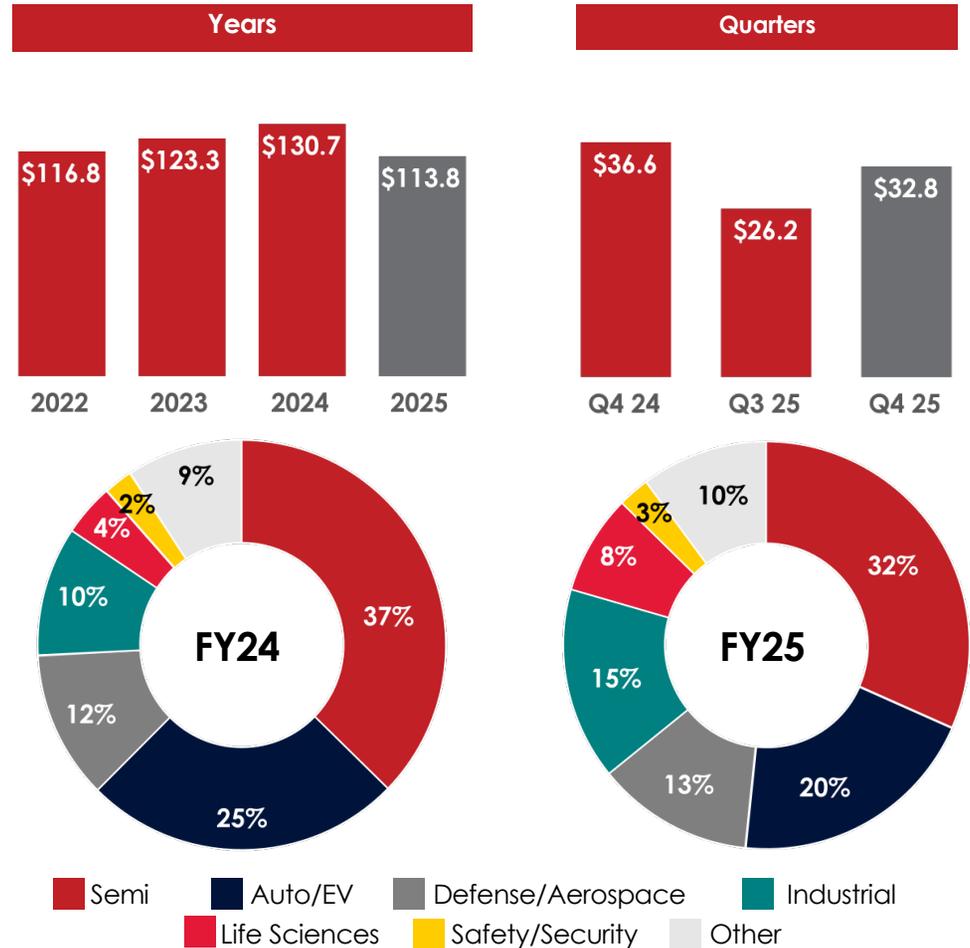
Q4 2025 revenue down \$3.8 million Y/Y

- Declines in Semi and Auto/EV partially mitigated by increases in Industrial and Life Sciences

Nearly 80% of Q4 2025 revenue from non-Semi markets

- Non-Semi revenue has grown at ~20% per year over the last five years

InTest Corporation



Gross Profit and Margin

(\$ in millions)

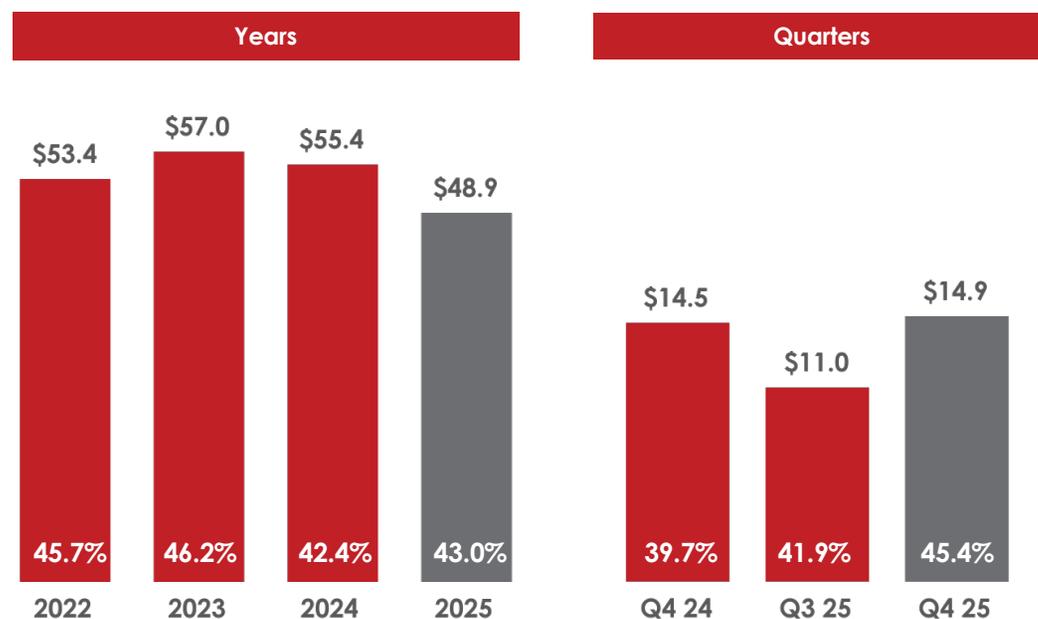
Sequential margin increase of 350 bps

- Driven by volume and favorable contributions from new Alfamation products

Q4 2025 gross margin of 45.4% increased 570 bps Y/Y

- Favorable product mix from Alfamation
- Q4 2024 included \$1.6M or 430 bps negative impact of acquisition related inventory step-up
- Benefited from cost-reduction actions throughout 2025 to improve efficiency

FY 2024 impact of inventory step-up was negative 120 bps



Operating Expenses

(\$ in millions)

Q4 2025 operating expenses increased \$1.4 million sequentially

- Primarily due to higher sales commissions and marketing activity

Q4 2025 vs Q4 2024, operating expenses increased \$1.2 million

- Q4 2025 operating expenses included \$0.8 million of amortization and \$0.2 million of restructuring costs
- Q4 24 included \$0.8 million non-recurring amortization credit from finalization of purchase accounting; no FY 2024 restructuring costs

Maintaining rigorous spending discipline

Operating expenses as a % of sales

36.6%

37.7%

39.8%

46.3%

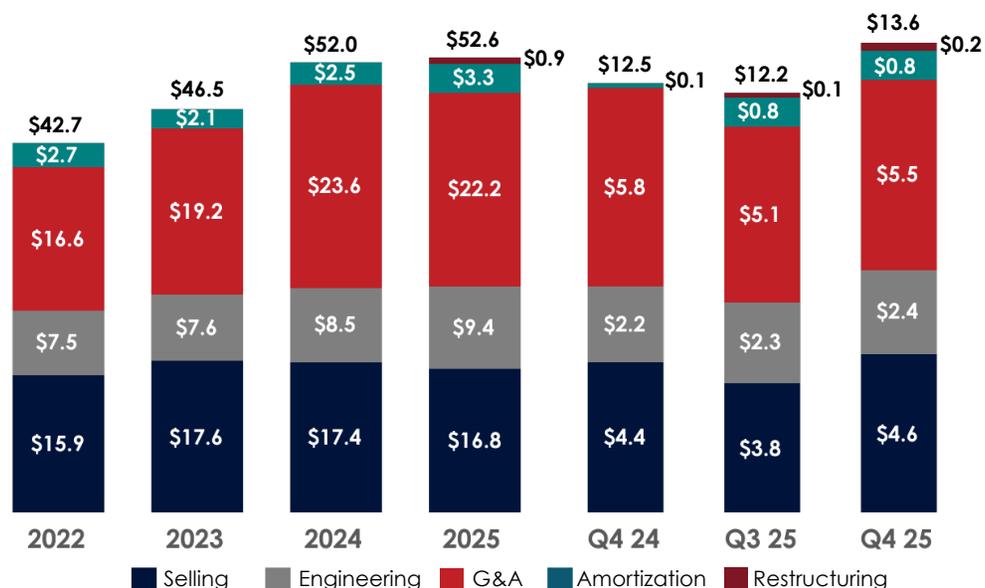
34.0%

46.4%

41.5%

Years

Quarters

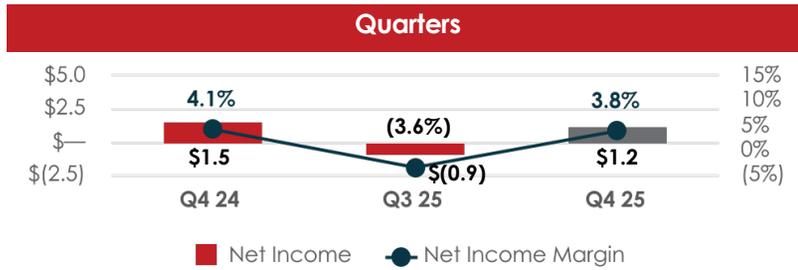


NOTE: Components may not add up to totals due to rounding.

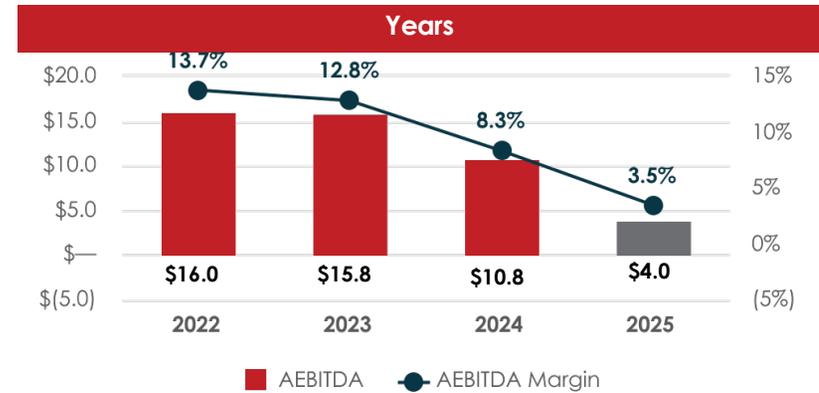
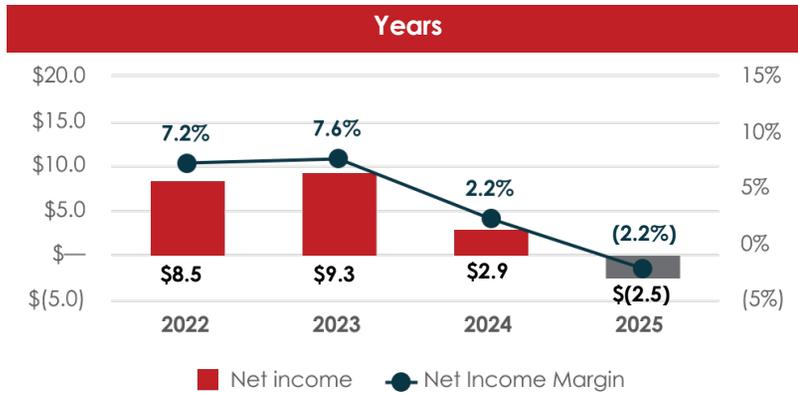
Net Earnings (Loss) and Adjusted EBITDA⁽²⁾

(\$ in millions, except margin percentages)

Net Earnings (Loss)



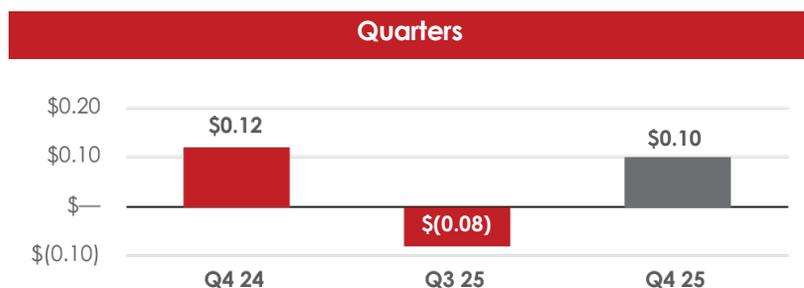
Adjusted EBITDA⁽²⁾



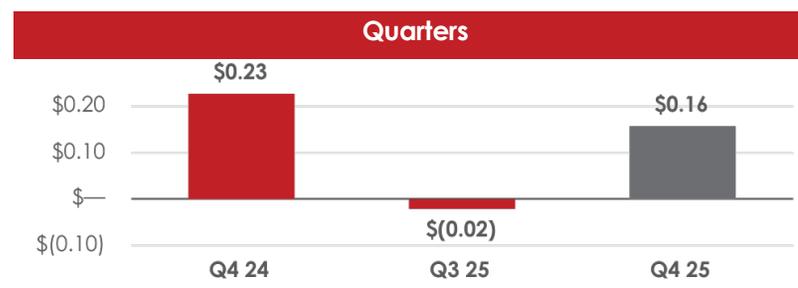
⁽²⁾ Adjusted Net Earnings (Loss), Adjusted EPS, Adjusted EBITDA, Adjusted EBITDA Margin and Free Cash Flow are non-GAAP financial measures. Further information can be found under "Non-GAAP Financial Measures." See also the reconciliations of GAAP financial measures to non-GAAP financial measures within the "Supplemental Information" that accompanies this presentation.

Earnings (Loss) per Share and Adjusted Earnings (Loss) per Share⁽²⁾

Earnings (Loss) Per Share



Adjusted Earnings (Loss) Per Share⁽²⁾



⁽²⁾ Adjusted Net Earnings (Loss), Adjusted EPS, Adjusted EBITDA, Adjusted EBITDA Margin and Free Cash Flow are non-GAAP financial measures. Further information can be found under "Non-GAAP Financial Measures." See also the reconciliations of GAAP financial measures to non-GAAP financial measures within the "Supplemental Information" that accompanies this presentation.

Capital Structure and Cash Flow

Cash Flow (\$ in millions)	Three Months Ended		Twelve Months Ended	
	12/31/25	12/31/24	12/31/25	12/31/24
Net cash (used in) provided by operating activities (GAAP)	\$(1.0)	\$2.6	\$7.3	\$3.8
Capital expenditures	(0.5)	(0.2)	(1.6)	(1.3)
Free cash flow ^{(2), (3)} (Non-GAAP)	\$(1.6)	\$2.4	\$5.7	\$2.5

Capitalization (\$ in millions)	12/31/25	12/31/24
Cash, cash equivalents and restricted cash	\$18.1	\$19.8
Total debt ⁽³⁾	\$7.5	\$15.0
Shareholders' equity	\$103.6	\$99.8
Total capitalization ⁽³⁾	\$111.1	\$114.8



Reduced debt by \$7.6 million during 2025

- \$1.4 million in Q4 2025



Approximately \$58 million in liquidity at 12/31/25

- Includes \$18.1 million in cash, cash equivalents and restricted cash
- \$40 million borrowing capacity



Leverage ratio was 1.9x (debt/TTM Adj. EBITDA⁽²⁾)

(2) Adjusted Net Earnings (Loss), Adjusted EPS, Adjusted EBITDA, Adjusted EBITDA Margin and Free Cash Flow are non-GAAP financial measures. Further information can be found under "Non-GAAP Financial Measures." See also the reconciliations of GAAP financial measures to non-GAAP financial measures within the "Supplemental Information" that accompanies this presentation.

(3) Figures may not sum precisely to the totals due to rounding conventions.

Outlook for 2026[†]

Q1 2026 Guidance

- Revenue: \$31 million to \$33 million
- Gross margin: approximately 44%
- Operating expenses: \$13.3 million to \$13.7 million
- Amortization expense : \$0.8 million

Full Year 2026 Guidance

- Revenue: \$125 million to \$130 million
- Gross margin: approximately 45%
- Operating expenses: \$53 million to \$55 million
- Amortization expense: \$2.6 million
- Interest expense: \$0.3 million
- Effective tax rate: approximately 18%
- Capital expenditures: 1% - 2% of revenue

Outlook excludes any potential acquisitions and restructuring

[†]Guidance provided as of February 27, 2026. The foregoing guidance is based on management's current views with respect to operating and market conditions and customers' forecasts. It also assumes macroeconomic conditions remain unchanged through the end of the year and does not take into account any extraordinary non-operating expenses that may occur from time to time. Actual results may differ materially from what is provided here today as a result of, among other things, the factors described under "Forward-Looking Statements" on slide 2.

VISION 2030

Defining the Next Phase
of InTest's Future



Executing Our VISION 2030 Strategy

Well positioned for diversified Y/Y growth as customers' spending strengthens

- Validated by new products adoption, market diversification and geographic expansion
- Continue to prioritize operational excellence to improve profitability

Customers value InTest's innovative solutions

- Deepening customer intimacy globally
- New products are expanding our addressable customer base

Healthy balance sheet to support long term strategy

- Reduced debt by \$7.6 million in 2025
- Unused capacity available under \$30.0 million term loan and \$10.0 million revolver

Conference Call Playback

- Replay Number: (844) 512-2921 or (412) 317-6671 passcode: 13758476
- Telephone replay available through Friday, March 13, 2026
- Webcast / Presentation / Replay available at www.intest.com/investor-relations
- Transcript, when available, at www.intest.com/investor-relations

Upcoming Events

- May 20-21, 2026 Sidoti & Company Micro-Cap Conference (virtual)

Supplemental Information

Q4 2025 Financial Results Conference Call

Reconciliation of Net Earnings (Loss) to Adjusted Net Earnings (Loss) (Non-GAAP) and Earnings (Loss) Per Diluted Share to Adjusted Earnings (Loss) Per Diluted Share (Non-GAAP)

	Three Months Ended				
	12/31/24	3/31/25	6/30/25	9/30/25	12/31/25
<i>(\$ in thousands, except per share amounts)</i>					
Net earnings (loss)	\$ 1,504	\$ (2,329)	\$ (503)	\$ (938)	\$ 1,243
Acquired intangible amortization	109	813	850	841	842
Restructuring costs	—	313	216	116	205
Acquired inventory step-up	1,570	—	—	—	—
Tax effect of adjusting items	(401)	(186)	(165)	(217)	(337)
Adjusted net earnings (loss) ⁽²⁾ (Non-GAAP)	<u>\$ 2,782</u>	<u>\$ (1,389)</u>	<u>\$ 398</u>	<u>\$ (198)</u>	<u>\$ 1,953</u>
Diluted weighted average shares outstanding	<u>12,216</u>	<u>12,179</u>	<u>12,246</u>	<u>12,209</u>	<u>12,277</u>
Net earnings per diluted share:					
Net earnings (loss)	\$ 0.12	\$ (0.19)	\$ (0.04)	\$ (0.08)	\$ 0.10
Acquired intangible amortization	0.01	0.07	0.07	0.07	0.07
Restructuring costs	—	0.03	0.02	0.01	0.02
Acquired inventory step-up	0.13	—	—	—	—
Tax effect of adjusting items	(0.03)	(0.02)	(0.01)	(0.02)	(0.03)
Adjusted net earnings (loss) per diluted share ⁽²⁾⁽³⁾ (Non-GAAP)	<u>\$ 0.23</u>	<u>\$ (0.11)</u>	<u>\$ 0.03</u>	<u>\$ (0.02)</u>	<u>\$ 0.16</u>

(2) Adjusted Net Earnings (Loss), Adjusted EPS, Adjusted EBITDA, Adjusted EBITDA Margin and Free Cash Flow are non-GAAP financial measures. Further information can be found under "Non-GAAP Financial Measures." See also the reconciliations of GAAP financial measures to non-GAAP financial measures within the "Supplemental Information" that accompanies this presentation.

(3) Figures may not sum precisely to the totals due to rounding conventions.

Reconciliation of Net Earnings (Loss) to Adjusted Net Earnings (Non-GAAP) and Earnings (Loss) Per Diluted Share to Adjusted Earnings Per Diluted Share (Non-GAAP)

	<u>Years Ended December 31,</u>			
	<u>2022</u>	<u>2023</u>	<u>2024</u>	<u>2025</u>
<i>(\$ in thousands, except per share amounts)</i>				
Net earnings (loss)	\$ 8,461	\$ 9,342	\$ 2,891	\$ (2,527)
Acquired intangible amortization	2,694	2,095	2,545	3,346
Restructuring costs	—	—	—	850
Acquired inventory step-up	—	—	1,570	—
Tax effect of adjusting items	(447)	(324)	(792)	(905)
Adjusted net earnings ⁽²⁾ (Non-GAAP)	<u>\$ 10,708</u>	<u>\$ 11,113</u>	<u>\$ 6,214</u>	<u>\$ 764</u>
Diluted weighted average shares outstanding	<u>10,863</u>	<u>11,780</u>	<u>12,239</u>	<u>12,256</u>
Net earnings per diluted share:				
Net earnings (loss)	\$ 0.78	\$ 0.79	\$ 0.24	\$ (0.21)
Acquired intangible amortization	0.25	0.18	0.21	0.27
Restructuring costs	—	—	—	0.07
Acquired inventory step-up	—	—	0.13	—
Tax effect of adjusting items	(0.04)	(0.03)	(0.07)	(0.07)
Adjusted net earnings per diluted share ⁽²⁾⁽³⁾ (Non-GAAP)	<u>\$ 0.99</u>	<u>\$ 0.94</u>	<u>\$ 0.51</u>	<u>\$ 0.06</u>

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(3) Figures may not sum precisely to the totals due to rounding conventions.

Reconciliation of Net Earnings (Loss) and Net Margin to Adjusted EBITDA (Non-GAAP) and Adjusted EBITDA Margin (Non-GAAP)

(\$ in thousands, except percentages)

	Three Months Ended				
	12/31/24	3/31/25	6/30/25	9/30/25	12/31/25
Net earnings (loss)	\$ 1,504	\$ (2,329)	\$ (503)	\$ (938)	\$ 1,243
Acquired intangible amortization	109	813	850	841	842
Acquired inventory step-up	1,570	—	—	—	—
Net interest expense (income)	109	37	30	(18)	(8)
Income tax expense (benefit)	298	(460)	(80)	(289)	134
Depreciation	415	316	314	317	378
Restructuring costs	—	313	216	116	205
Non-cash stock-based compensation	407	423	435	354	398
Adjusted EBITDA ⁽²⁾ (Non-GAAP)	<u>\$ 4,412</u>	<u>\$ (887)</u>	<u>\$ 1,262</u>	<u>\$ 383</u>	<u>\$ 3,192</u>
Revenue	\$ 36,603	\$ 26,637	\$ 28,130	\$ 26,236	\$ 32,822
Net margin	4.1%	(8.7%)	(1.8%)	(3.6%)	3.8%
Adjusted EBITDA margin ⁽²⁾ (Non-GAAP)	12.1%	(3.3%)	4.5%	1.5%	9.7%

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Reconciliation of Net Earnings and Net Margin to Adjusted EBITDA (Non-GAAP) and Adjusted EBITDA Margin (Non-GAAP)

(\$ in thousands, except percentages)

	<u>Years Ended December 31,</u>			
	<u>2022</u>	<u>2023</u>	<u>2024</u>	<u>2025</u>
Net earnings (loss)	\$ 8,461	\$ 9,342	\$ 2,891	\$ (2,527)
Acquired intangible amortization	2,694	2,095	2,545	3,346
Acquired inventory step-up	—	—	1,570	—
Net interest expense (income)	600	(404)	(7)	41
Income tax expense (benefit)	1,684	1,706	563	(695)
Depreciation	810	1,021	1,399	1,325
Restructuring costs	—	—	—	850
Non-cash stock-based compensation	1,787	2,047	1,857	1,610
Adjusted EBITDA ⁽²⁾ (Non-GAAP)	<u>\$ 16,036</u>	<u>\$ 15,807</u>	<u>\$ 10,818</u>	<u>\$ 3,950</u>
Revenue	\$116,828	\$123,302	\$130,690	\$113,825
Net margin	7.2%	7.6%	2.2%	(2.2%)
Adjusted EBITDA margin ⁽²⁾ (Non-GAAP)	13.7%	12.8%	8.3%	3.5%

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Segment Reporting (Quarterly)

(\$ in thousands)	Three Months Ended													
	12/31/24		3/31/25		6/30/25		9/30/25		12/31/25					
Electronic Test	\$	21,122	\$	13,259	\$	13,733	\$	12,099	\$	17,103				
Environmental Technologies		7,063		6,268		7,215		7,490		8,321				
Process Technologies		8,418		7,110		7,182		6,647		7,398				
Total Revenue	\$	<u>36,603</u>	\$	<u>26,637</u>	\$	<u>28,130</u>	\$	<u>26,236</u>	\$	<u>32,822</u>				
			% of	% of	% of	% of	% of	% of	% of	% of				
			divisional	divisional	divisional	divisional	divisional	divisional	divisional	divisional				
			revenue	revenue	revenue	revenue	revenue	revenue	revenue	revenue				
Electronic Test	\$	2,865	14%	\$	681	5%	\$	1,560	11%	\$	3,583	21%		
Environmental Technologies		682	10%		(255)	(4%)		611	8%		780	10%		
Process Technologies		971	12%		207	3%		399	6%		(98)	(1%)		
Total income from divisional operations		4,518	12%		633	2%		2,570	9%		1,828	7%	4,325	13%
Corporate expense		(2,330)			(2,388)			(2,431)			(2,064)			(2,002)
Acquired intangible amortization		(109)			(813)			(850)			(841)			(842)
Restructuring costs		—			(313)			(216)			(116)			(205)
Interest expense		(234)			(152)			(119)			(95)			(84)
Other income (expense)		(43)			244			463			61			185
Earnings (loss) before income tax expense	\$	<u>1,802</u>		\$	<u>(2,789)</u>		\$	<u>(583)</u>		\$	<u>(1,227)</u>		\$	<u>1,377</u>

Segment Reporting (12 Months)

(\$ in thousands)	Years Ended December 31,							
	2022	2023	2024	2025				
Electronic Test	\$ 40,219	\$ 41,016	\$ 63,878	\$ 56,194				
Environmental Technologies	30,172	30,801	28,898	29,294				
Process Technologies	46,437	51,485	37,914	28,337				
Total Revenue	<u>\$ 116,828</u>	<u>\$ 123,302</u>	<u>\$ 130,690</u>	<u>\$ 113,825</u>				
		% of	% of	% of			% of	% of
		divisional	divisional	divisional			divisional	divisional
		revenue	revenue	revenue			revenue	revenue
Electronic Test	\$ 9,931	25%	\$ 10,189	25%	\$ 8,732	14%	\$ 6,970	12%
Environmental Technologies	3,817	13%	3,073	10%	2,116	7%	1,955	7%
Process Technologies	8,230	18%	9,544	19%	4,972	13%	431	2%
Total income from divisional operations	21,978	19%	22,806	18%	15,820	12%	9,356	8%
Corporate expense	(8,563)		(10,272)		(9,881)		(8,885)	
Acquired intangible amortization	(2,694)		(2,095)		(2,545)		(3,346)	
Restructuring costs	—		—		—		(850)	
Interest expense	(635)		(679)		(846)		(450)	
Other income	59		1,288		906		953	
Earnings (loss) before income tax expense	<u>\$ 10,145</u>		<u>\$ 11,048</u>		<u>\$ 3,454</u>		<u>\$ (3,222)</u>	