# Rockwell Automation, Inc.

**ROK**

NYSE; business equipment; SIC 3829, Measuring & Controlling Devices, NEC; CIK 0001024478

**C/D**

**on the C/D boundary of 497 graded peers in business equip...**

rank 301 of 497; percentile 60.5; sampling error 2.2 points; lower is stronger

A B C D E

**C/D, the tortoise**



## Scoreboard

| | |
|---|---|
| **Profitability** | C<br>percentile 45.9 |
| **Solvency** | C/D<br>percentile 60.0 |
| **Growth and financing** | C<br>percentile 49.3 |
| **Reliability** | 0.94 AUC<br>filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025 |
| **Peer failure rate** | 0.52% a year<br>Item 1.03 bankruptcies, same asset band, 2012 to 2025 |
| **Size band** | over $2.67B assets<br>total assets $11.2B |
| **Standard universe** | inside<br>revenue above $1M and assets above $10M |
| **Warnings** | none triggered<br>not computable: distress |
| **Inputs computable** | 11 of 14 |
| **Graded from** | filings received through Nov 12, 2025<br>341 days before the rescan; latest periodic filing 10-Q received Aug 4, 2026 |
| **Last close** | $426.16<br>2026-10-16; market equity $47.3B; no price enters the letter |

**Share price, twelve months to the rescan**




*Split-adjusted close. Each lollipop is a rescan and carries the letter held then.*

**Letter at every rescan, 2012 to 2026**




*Sector percentile at each rescan, 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 Nov 12, 2025*

Rockwell Automation, Inc. (Rockwell Automation or the Company) is the world's largest company dedicated to industrial automation and digital transformation. We understand and simplify our customers' complex production challenges and deliver the most valued solutions that combine technology and industry expertise. As a result, we make our customers more resilient, agile, and sustainable, creating more ways to win. See Item 7. Management's Discussion and Analysis of Financial Condition and Results of Operations (MD&A) for additional information on our business and long-term strategy. The Company continues the business founded as the Allen-Bradley Company in 1903.

## The fourteen inputs

*lower percentile is stronger; sleeves and inputs within a sleeve carry equal weight*

| Input | Value | Peer median | Percentile, 0 to 100 | Pct | Peers | Period end |
|---|---|---|---|---|---|---|
| **Profitability, sleeve percentile 45.9** | | | | | | |
| Gross profitability | 35.8% | 28.6% | | 34.4 | 557 | 2025-09-30 |
| Return on invested capital | 24.4% | 11.0% | | 23.9 | 135 | 2025-09-30 |

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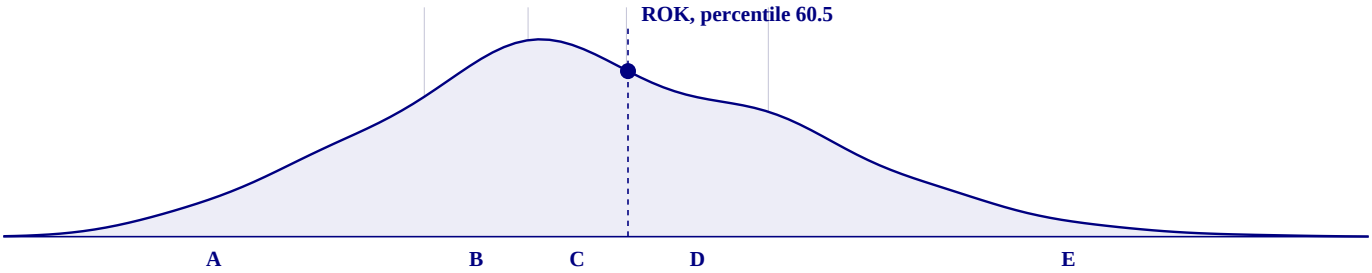
| | | | | | |
|---|---|---|---|---|---|
| Accruals ratio | (6.0%) | (7.4%) | 59.8 | 620 | 2025-09-30 |
| Gross margin stability, five years | 3.6 pts | 2.3 pts | 65.5 | 427 | 2025-09-30 |
| **Solvency, sleeve percentile 60.0** | | | | | |
| Twelve-month failure probability | not computable | 0.05% | | | |
| *liabilities and a nearby cover-page share count are required at 2026-06-30* | | | | | |
| Altman Z double-prime | not computable | 2.16 | | | |
| *one or more required annual facts are missing* | | | | | |
| Net debt to EBITDA | 1.06x | 1.11x | 45.9 | 147 | 2025-09-30 |
| Interest coverage | not computable | 3.77x | | | |
| *required facts have no common fiscal period end* | | | | | |
| Current ratio | 1.14x | 2.01x | 74.2 | 664 | 2025-09-30 |
| **Growth and financing, sleeve percentile 49.3** | | | | | |
| Revenue growth, three-year compound | 2.4% | 6.4% | 61.0 | 537 | 2025-09-30 |
| Free cash flow growth, three-year compound | 25.8% | 17.7% | 39.6 | 266 | 2025-09-30 |
| Reinvestment rate | 3.6% | 13.5% | 54.5 | 225 | 2025-09-30 |
| Asset growth, three years | 1.4% | 5.0% | 57.8 | 562 | 2025-09-30 |
| Net share issuance, one year | (0.6%) | 0.5% | 33.5 | 410 | 2025-10-31 |

## Among 497 peers

*business equipment; 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 |
|---|---|---|---|---|
| 296 | Next Technology Holding Inc. (NXTT) | 59.5 | C/D | dilution, late filer |
| 297 | Northrop Grumman Corp. (NOC) | 59.7 | C/D | |
| 298 | Certara, Inc. (CERT) | 59.9 | C/D | |
| 299 | Backblaze, Inc. (BLZE) | 60.1 | C/D | |
| 300 | Nlight, Inc. (LASR) | 60.3 | C/D | fortress balance sheet |
| 301 | Rockwell Automation, Inc. (ROK) | 60.5 | C/D | |
| 302 | Mettler Toledo International (MTD) | 60.7 | C/D | |
| 303 | IPG Photonics Corp. (IPGP) | 60.9 | C/D | fortress balance sheet |
| 304 | Bentley Systems Inc. (BSY) | 61.1 | C/D | |
| 305 | NXP Semiconductors N.V. (NXPI) | 61.3 | C/D | |
| 306 | Commerce.com, Inc. (CMRC) | 61.5 | C/D | |

## What the price implies

*at the 2026-10-16 close; none of these enters the grade*

| Measure | Value | Peer median | Percentile |
|---|---|---|---|
| Twelve-month price change, skipping the latest month | 23.1% | 2.2% | 67 |
| Distance from 52-week high | (13.9%) | (33.4%) | 80 |
| EBIT to enterprise value | 3.4% | 1.5% | 66 |
| Free cash flow yield | 2.9% | 2.9% | 50 |
| Book value to price | 0.07 | 0.26 | 18 |
| Sales to price | 0.18 | 0.32 | 33 |

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| | | | |
|---|---|---|---|
| Composite equity issuance, five years | (14.5%) | 4.2% | 19 |
| Relative strength against the sector, log excess return | (0.08) | (0.26) | 67 |

## Diagnostics

*shown on every report; none enters the grade*

| Measure | Value |
|---|---|
| **Piotroski F-score 7 of 9, period end 2025-09-30** | |
| Return on assets above zero | pass |
| 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 | pass |
| No new shares issued | pass |
| Gross margin improved | pass |
| Asset turnover improved | pass |
| **Cash, filings, liquidity** | |
| Cash and equivalents | $479.0M |
| Operating cash flow, four quarters | $1.7B |
| Months of runway | not finite |
| Days since last periodic filing | 76 (10-Q received Aug 4, 2026) |
| Median daily dollar volume, 63 sessions | $321.5M |

## Sources

*every fact behind the inputs; each row links to its filing index on sec.gov*

| # | Concept | XBRL tag | Value | Period end | Received | Form | Accession |
|---|---|---|---|---|---|---|---|
| 1 | gross profit | us-gaap:GrossProfit | $4.0B | 2025-09-30 | 2025-11-12 | 10-K | 25-000116 |
| 2 | assets | us-gaap:Assets | $11.2B | 2025-09-30 | 2025-11-12 | 10-K | 25-000116 |
| 3 | operating income | us-gaap:OperatingIncomeLoss | $1.7B | 2025-09-30 | 2025-11-12 | 10-K | 25-000116 |
| 4 | pretax income | us-gaap:IncomeLossFromContinuingOperationsBeforeInc... | $917.0M | 2025-09-30 | 2025-11-12 | 10-K | 25-000116 |
| 5 | income tax | us-gaap:IncomeTaxExpenseBenefit | $168.0M | 2025-09-30 | 2025-11-12 | 10-K | 25-000116 |
| 6 | total debt | us-gaap:LongTermDebtAndCapitalLeaseObligations | $2.6B | 2025-09-30 | 2025-11-12 | 10-K | 25-000116 |
| 7 | book equity | us-gaap:StockholdersEquity | $3.7B | 2025-09-30 | 2025-11-12 | 10-K | 25-000116 |
| 8 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $468.0M | 2025-09-30 | 2025-11-12 | 10-K | 25-000116 |
| 9 | total debt | us-gaap:LongTermDebtAndCapitalLeaseObligations | $2.6B | 2024-09-30 | 2025-11-12 | 10-K | 25-000116 |
| 10 | book equity | us-gaap:StockholdersEquity | $3.5B | 2024-09-30 | 2025-11-12 | 10-K | 25-000116 |
| 11 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $471.0M | 2024-09-30 | 2025-11-12 | 10-K | 25-000116 |
| 12 | net income | us-gaap:NetIncomeLoss | $869.0M | 2025-09-30 | 2025-11-12 | 10-K | 25-000116 |
| 13 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $1.5B | 2025-09-30 | 2025-11-12 | 10-K | 25-000116 |
| 14 | assets | us-gaap:Assets | $11.2B | 2024-09-30 | 2025-11-12 | 10-K | 25-000116 |
| 15 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $8.3B | 2025-09-30 | 2025-11-12 | 10-K | 25-000116 |
| 16 | gross profit | us-gaap:GrossProfit | $3.9B | 2024-09-30 | 2025-11-12 | 10-K | 25-000116 |
| 17 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $8.3B | 2024-09-30 | 2025-11-12 | 10-K | 25-000116 |
| 18 | gross profit | us-gaap:GrossProfit | $4.4B | 2023-09-30 | 2025-11-12 | 10-K | 25-000116 |
| 19 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $9.1B | 2023-09-30 | 2025-11-12 | 10-K | 25-000116 |
| 20 | gross profit | us-gaap:GrossProfit | $3.1B | 2022-09-30 | 2024-11-12 | 10-K | 24-000107 |
| 21 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $7.8B | 2022-09-30 | 2024-11-12 | 10-K | 24-000107 |
| 22 | gross profit | us-gaap:GrossProfit | $2.9B | 2021-09-30 | 2023-11-08 | 10-K | 23-000126 |
| 23 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $7.0B | 2021-09-30 | 2023-11-08 | 10-K | 23-000126 |
| 24 | depreciation amortization | us-gaap:DepreciationDepletionAndAmortization | $325.0M | 2025-09-30 | 2025-11-12 | 10-K | 25-000116 |
| 25 | current assets | us-gaap:AssetsCurrent | $3.9B | 2025-09-30 | 2025-11-12 | 10-K | 25-000116 |
| 26 | current liabilities | us-gaap:LiabilitiesCurrent | $3.4B | 2025-09-30 | 2025-11-12 | 10-K | 25-000116 |
| 27 | capital expenditure | us-gaap:PaymentsToAcquireProductiveAssets | $186.0M | 2025-09-30 | 2025-11-12 | 10-K | 25-000116 |
| 28 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $864.0M | 2024-09-30 | 2025-11-12 | 10-K | 25-000116 |
| 29 | capital expenditure | us-gaap:PaymentsToAcquireProductiveAssets | $225.0M | 2024-09-30 | 2025-11-12 | 10-K | 25-000116 |

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| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| 30 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $1.4B | 2023-09-30 | 2025-11-12 | 10-K | 25-000116 |
| 31 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $160.5M | 2023-09-30 | 2023-11-08 | 10-K | 23-000126 |
| 32 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $823.1M | 2022-09-30 | 2024-11-12 | 10-K | 24-000107 |
| 33 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $141.1M | 2022-09-30 | 2023-11-08 | 10-K | 23-000126 |
| 34 | current assets | us-gaap:AssetsCurrent | $3.9B | 2024-09-30 | 2025-11-12 | 10-K | 25-000116 |
| 35 | current liabilities | us-gaap:LiabilitiesCurrent | $3.6B | 2024-09-30 | 2025-11-12 | 10-K | 25-000116 |
| 36 | assets | us-gaap:Assets | $11.3B | 2023-09-30 | 2025-11-12 | 10-K | 25-000116 |
| 37 | assets | us-gaap:Assets | $10.8B | 2022-09-30 | 2024-11-12 | 10-K | 24-000107 |
| 38 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 112,273,567 | 2025-10-31 | 2025-11-12 | 10-K | 25-000116 |
| 39 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 112,896,809 | 2024-10-31 | 2024-11-12 | 10-K | 24-000107 |

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