# Adient plc

**ADNT**

NYSE; consumer durables; SIC 3714, Motor Vehicle Parts & Accessories; CIK 0001670541

**C**

**middle fifth of 460 graded peers in the pooled consumer group**

rank 206 of 460; percentile 45.5; sampling error 2.3 points; lower is stronger

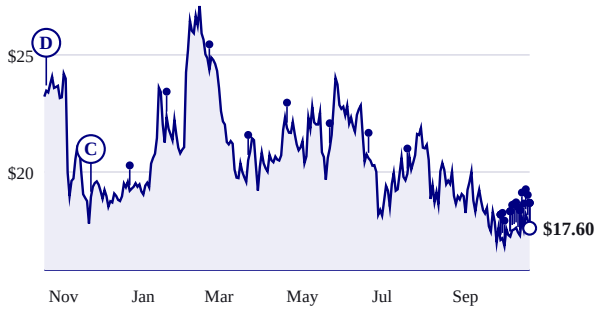
A B C D E

**C, the tortoise**



| Scoreboard | |
|---|---|
| **Profitability** | B/C<br>percentile 41.7 |
| **Solvency** | D<br>percentile 70.1 |
| **Growth and financing** | B<br>percentile 32.1 |
| **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 $9.0B |
| **Standard universe** | inside<br>revenue above $1M and assets above $10M |
| **Warnings** | none triggered<br>not computable: short runway, distress |
| **Inputs computable** | 8 of 14 |
| **Graded from** | filings received through Nov 18, 2025<br>336 days before the rescan; latest periodic filing 10-Q received Aug 5, 2026 |
| **Last close** | $17.59<br>2026-10-19; market equity $1.4B; 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 18, 2025*

Adient plc ("Adient") is a global leader in the automotive seating supply industry with leading market positions in the Americas, Europe and Asia and maintains longstanding relationships with the largest global automotive original equipment manufacturers ("OEMs"). Adient's proprietary technologies extend into virtually every area of automotive seating solutions, including complete seating systems, frames, mechanisms, foam, head restraints, armrests and trim covers. Adient is a global seat supplier with the capability to design, develop, engineer, manufacture, and deliver complete seat systems and components in every major automotive producing region in the world.

## The fourteen inputs

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

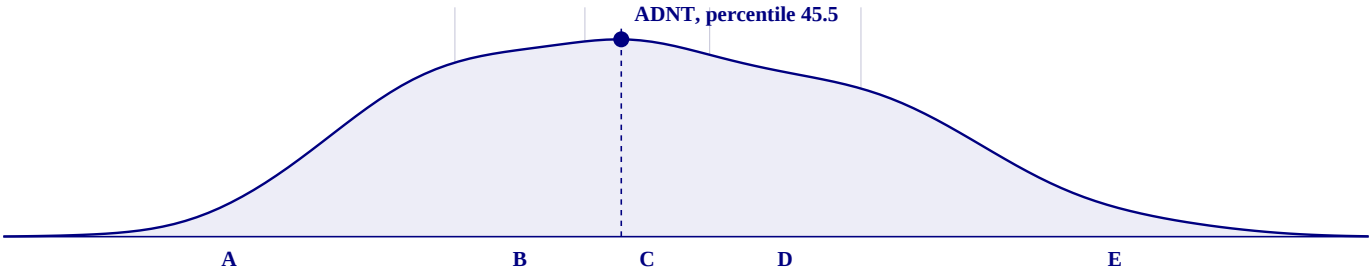
| Input | Value | Peer median | Percentile, 0 to 100 | Pct | Peers | Period end |
|---|---|---|---|---|---|---|
| **Profitability, sleeve percentile 41.7** | | | | | | |
| Gross profitability | 10.7% | 34.4% | | 86.9 | 473 | 2025-09-30 |
| Return on invested capital | not computable | 8.9% | | | | |

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| | | | | | |
|---|---|---|---|---|---|
| *one or more required annual facts are missing* | | | | | |
| Accruals ratio | (8.0%) | (5.1%) | 33.5 | 523 | 2025-09-30 |
| Gross margin stability, five years | 0.4 pts | 1.7 pts | 4.7 | 408 | 2025-09-30 |
| **Solvency, sleeve percentile 70.1** | | | | | |
| 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 | | | |
| *one or more required annual facts are missing* | | | | | |
| Interest coverage | not computable | 2.57x | | | |
| *one or more required annual facts are missing* | | | | | |
| Current ratio | 1.12x | 1.56x | 70.1 | 539 | 2025-09-30 |
| **Growth and financing, sleeve percentile 32.1** | | | | | |
| Revenue growth, three-year compound | 1.0% | 1.4% | 50.7 | 482 | 2025-09-30 |
| Free cash flow growth, three-year compound | 63.1% | 8.3% | 10.4 | 250 | 2025-09-30 |
| Reinvestment rate | not computable | 12.0% | | | |
| *one or more required annual facts are missing* | | | | | |
| Asset growth, three years | (0.7%) | 1.7% | 58.4 | 487 | 2025-09-30 |
| Net share issuance, one year | (6.7%) | (0.3%) | 8.9 | 381 | 2025-09-30 |

## 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 |
|---|---|---|---|---|
| 201 | Cannae Holdings, Inc. (CNNE) | 44.7 | C | fortress balance sheet |
| 202 | Hooker Furnishings Corp. (HOFT) | 45.1 | C | |
| 203 | Herbalife Ltd. (HLF) | 45.1 | C | |
| 204 | Sonic Automotive Inc. (SAH) | 45.5 | C | |
| 205 | Post Holdings, Inc. (POST) | 45.5 | C | |
| 206 | Adient plc (ADNT) | 45.5 | C | |
| 207 | Honest Company, Inc. (HNST) | 45.9 | C | |
| 208 | Sonos Inc. (SONO) | 46.2 | C | fortress balance sheet |
| 209 | First Watch Restaurant Group, Inc. (FWRG) | 46.3 | C | |
| 210 | Philip Morris International Inc. (PM) | 46.3 | C | |
| 211 | Yum China Holdings, Inc. (YUMC) | 46.7 | C | |

## What the price implies

*at the 2026-10-19 close; none of these enters the grade*

| Measure | Value | Peer median | Percentile |
|---|---|---|---|
| Twelve-month price change, skipping the latest month | (21.2%) | (0.1%) | 26 |
| Distance from 52-week high | (35.0%) | (25.2%) | 34 |
| EBIT to enterprise value | not computable | 4.9% | |

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| | | | |
|---|---|---|---|
| Free cash flow yield | 15.0% | 4.4% | 89 |
| Book value to price | 1.27 | 0.44 | 85 |
| Sales to price | 10.71 | 1.48 | 95 |
| Composite equity issuance, five years | (19.7%) | (16.0%) | 38 |
| Relative strength against the sector, log excess return | (0.21) | (0.01) | 28 |

## Diagnostics

*shown on every report; none enters the grade*

| Measure | Value |
|---|---|
| **Piotroski F-score 5 of 9, period end 2025-09-30** | |
| 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 | pass |
| No new shares issued | pass |
| Gross margin improved | pass |
| Asset turnover improved | fail |
| **Cash, filings, liquidity** | |
| Cash and equivalents | n/a |
| Operating cash flow, four quarters | n/a |
| Months of runway | not finite |
| Days since last periodic filing | 76 (10-Q received Aug 5, 2026) |
| Median daily dollar volume, 63 sessions | $16.0M |

## 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 | $961.0M | 2025-09-30 | 2025-11-18 | 10-K | 25-000152 |
| 2 | assets | us-gaap:Assets | $9.0B | 2025-09-30 | 2025-11-18 | 10-K | 25-000152 |
| 3 | net income | us-gaap:NetIncomeLoss | -$281.0M | 2025-09-30 | 2025-11-18 | 10-K | 25-000152 |
| 4 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $449.0M | 2025-09-30 | 2025-11-18 | 10-K | 25-000152 |
| 5 | assets | us-gaap:Assets | $9.4B | 2024-09-30 | 2025-11-18 | 10-K | 25-000152 |
| 6 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $14.5B | 2025-09-30 | 2025-11-18 | 10-K | 25-000152 |
| 7 | gross profit | us-gaap:GrossProfit | $928.0M | 2024-09-30 | 2025-11-18 | 10-K | 25-000152 |
| 8 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $14.7B | 2024-09-30 | 2025-11-18 | 10-K | 25-000152 |
| 9 | gross profit | us-gaap:GrossProfit | $1.0B | 2023-09-30 | 2025-11-18 | 10-K | 25-000152 |
| 10 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $15.4B | 2023-09-30 | 2025-11-18 | 10-K | 25-000152 |
| 11 | gross profit | us-gaap:GrossProfit | $807.0M | 2022-09-30 | 2024-11-18 | 10-K | 24-000109 |
| 12 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $14.1B | 2022-09-30 | 2024-11-18 | 10-K | 24-000109 |
| 13 | gross profit | us-gaap:GrossProfit | $826.0M | 2021-09-30 | 2023-11-17 | 10-K | 23-000153 |
| 14 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $13.7B | 2021-09-30 | 2023-11-17 | 10-K | 23-000153 |
| 15 | current assets | us-gaap:AssetsCurrent | $4.1B | 2025-09-30 | 2025-11-18 | 10-K | 25-000152 |
| 16 | current liabilities | us-gaap:LiabilitiesCurrent | $3.7B | 2025-09-30 | 2025-11-18 | 10-K | 25-000152 |
| 17 | capital expenditure | us-gaap:PaymentsToAcquireProductiveAssets | $245.0M | 2025-09-30 | 2025-11-18 | 10-K | 25-000152 |
| 18 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $543.0M | 2024-09-30 | 2025-11-18 | 10-K | 25-000152 |
| 19 | capital expenditure | us-gaap:PaymentsToAcquireProductiveAssets | $266.0M | 2024-09-30 | 2025-11-18 | 10-K | 25-000152 |
| 20 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $667.0M | 2023-09-30 | 2025-11-18 | 10-K | 25-000152 |
| 21 | capital expenditure | us-gaap:PaymentsToAcquireProductiveAssets | $252.0M | 2023-09-30 | 2025-11-18 | 10-K | 25-000152 |
| 22 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $274.0M | 2022-09-30 | 2024-11-18 | 10-K | 24-000109 |
| 23 | capital expenditure | us-gaap:PaymentsToAcquireProductiveAssets | $227.0M | 2022-09-30 | 2024-11-18 | 10-K | 24-000109 |
| 24 | assets | us-gaap:Assets | $9.4B | 2023-09-30 | 2025-11-18 | 10-K | 25-000152 |
| 25 | assets | us-gaap:Assets | $9.2B | 2022-09-30 | 2024-11-18 | 10-K | 24-000109 |

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| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| 26 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 79,151,497 | 2025-09-30 | 2025-11-18 | 10-K | 25-000152 |
| 27 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 84,866,763 | 2024-09-30 | 2024-11-18 | 10-K | 24-000109 |

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