Dana Inc.

DAN

NYSE; consumer durables; SIC 3714, Motor Vehicle Parts & Accessories; CIK 0000026780

D

fourth fifth of 460 graded peers in the pooled consumer group

rank 337 of 460; percentile 72.8; sampling error 2.3 points; lower is stronger

A B C D E

D, the sloth



Scoreboard	
Profitability	D percentile 63.5
Solvency	D percentile 67.6
Growth and financing	C percentile 45.0
Reliability	0.94 AUC 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 Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $7.8B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	late filer not computable: distress
Inputs computable	11 of 14
Graded from	filings received through Feb 27, 2026 235 days before the rescan; latest periodic filing 10-Q received Aug 6, 2026
Last close	$28.75 2026-10-19; market equity $3.1B; 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 Feb 27, 2026

Dana Incorporated (Dana), with history dating back to 1904, is headquartered in Maumee, Ohio. We are a world leader in providing power-conveyance and energy-management solutions for on-highway vehicles. The company's portfolio improves the efficiency, performance, and sustainability of light and commercial vehicles. From axles, driveshafts, transmissions, sealing and thermal products to electrification products including motors, inverters, controllers, e-sealing, e-thermal and digital solutions, we enable the propulsion of internal combustion engine (ICE), hybrid and electric powered vehicles by supplying nearly every major on-highway vehicle manufacturer 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 63.5						
Gross profitability	7.7%	34.4%		90.5	473	2025-12-31
Return on invested capital	not computable	8.9%				

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pretax income must exceed the validity floor and imply a 0%-100% tax rate					
Accruals ratio	(5.6%)	(5.1%)	48.3	523	2025-12-31
Gross margin stability, five years	1.8 pts	1.7 pts	51.8	408	2025-12-31
Solvency, sleeve percentile 67.6					
Twelve-month failure probability	not computable	0.04%			
latest liabilities, cash plus short-term investments, book equity, and shares are required					
Altman Z double-prime	0.82	2.11	61.7	400	2025-12-31
Net debt to EBITDA	4.33x	2.11x	79.6	187	2025-12-31
Interest coverage	0.77x	2.57x	61.4	128	2025-12-31
Current ratio	1.17x	1.56x	67.7	539	2025-12-31
Growth and financing, sleeve percentile 45.0					
Revenue growth, three-year compound	(9.6%)	1.4%	87.1	482	2025-12-31
Free cash flow growth, three-year compound	12.6%	8.3%	43.4	250	2025-12-31
Reinvestment rate	not computable	12.0%			
pretax income must exceed the validity floor and imply a 0%-100% tax rate					
Asset growth, three years	1.6%	1.7%	48.6	487	2025-12-31
Net share issuance, one year	(25.1%)	(0.3%)	0.8	381	2026-02-06

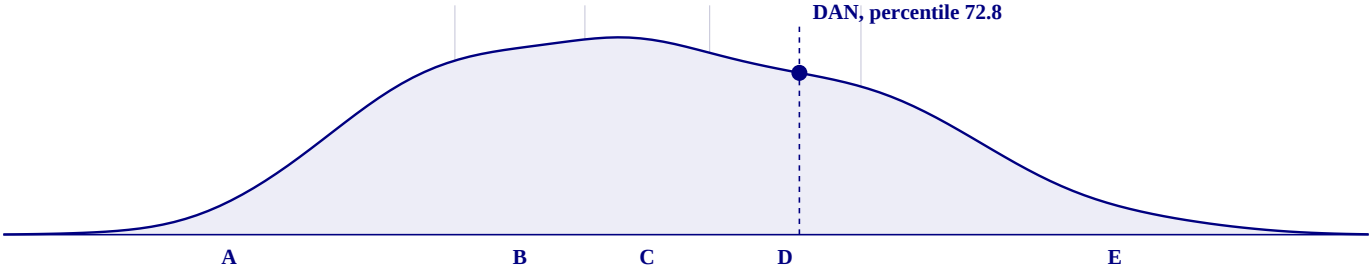
Warnings

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
332	Ingram Micro Holding Corp. (INGM)	71.6	D	
333	Team Inc. (TISI)	72.0	D	
334	Caleres Inc. (CAL)	72.4	D	fortress balance sheet
335	Target Corp. (TGT)	72.4	D	
336	El Pollo Loco Holdings, Inc. (LOCO)	72.8	D	
337	Dana Inc. (DAN)	72.8	D	late filer
338	Dave & Buster's Entertainment, Inc. (PLAY)	73.2	D	
339	Village Farms International, Inc. (VFF)	73.2	D	fortress balance sheet
340	Sherwin Williams Co. (SHW)	73.5	D	
341	Aramark (ARMK)	73.9	D	
342	General Mills Inc. (GIS)	74.0	D	

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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	52.0%	(0.1%)	88
Distance from 52-week high	(26.1%)	(25.2%)	49
EBIT to enterprise value	3.4%	4.9%	36
Free cash flow yield	9.6%	4.4%	76
Book value to price	0.62	0.44	60
Sales to price	2.42	1.48	68
Composite equity issuance, five years	(43.6%)	(16.0%)	7
Relative strength against the sector, log excess return	0.44	(0.01)	90

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 7 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	fail
No new shares issued	pass
Gross margin improved	pass
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$331.0M
Operating cash flow, four quarters	$431.0M
Months of runway	not finite
Days since last periodic filing	75 (10-Q received Aug 6, 2026)
Median daily dollar volume, 63 sessions	$36.9M

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	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$7.5B	2025-12-31	2026-02-27	10-K	26-006076
2	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$6.9B	2025-12-31	2026-02-27	10-K	26-006076
3	assets	us-gaap:Assets	$7.8B	2025-12-31	2026-02-27	10-K	26-006076
4	operating income	us-gaap:OperatingIncomeLoss	$139.0M	2025-12-31	2026-02-27	10-K	26-006076
5	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$32.0M	2025-12-31	2026-02-27	10-K	26-006076
6	income tax	us-gaap:IncomeTaxExpenseBenefit	$53.0M	2025-12-31	2026-02-27	10-K	26-006076
7	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$2.6B	2025-12-31	2026-02-27	10-K	26-006076
8	book equity	us-gaap:StockholdersEquity	$840.0M	2025-12-31	2026-02-27	10-K	26-006076
9	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$469.0M	2025-12-31	2026-02-27	10-K	26-006076
10	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$2.4B	2024-12-31	2026-02-27	10-K	26-006076
11	book equity	us-gaap:StockholdersEquity	$1.3B	2024-12-31	2026-02-27	10-K	26-006076
12	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$494.0M	2024-12-31	2026-02-27	10-K	26-006076
13	net income	us-gaap:NetIncomeLoss	$85.0M	2025-12-31	2026-02-27	10-K	26-006076
14	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$512.0M	2025-12-31	2026-02-27	10-K	26-006076
15	assets	us-gaap:Assets	$7.5B	2024-12-31	2026-02-27	10-K	26-006076
16	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$7.7B	2024-12-31	2026-02-27	10-K	26-006076
17	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$7.4B	2024-12-31	2026-02-27	10-K	26-006076
18	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$7.6B	2023-12-31	2026-02-27	10-K	26-006076

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19	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$7.2B	2023-12-31	2026-02-27	10-K	26-006076
20	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$10.2B	2022-12-31	2025-02-20	10-K	25-004554
21	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$9.4B	2022-12-31	2025-02-20	10-K	25-004554
22	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$8.9B	2021-12-31	2024-02-20	10-K	24-004751
23	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$8.1B	2021-12-31	2024-02-20	10-K	24-004751
24	current assets	us-gaap:AssetsCurrent	$3.9B	2025-12-31	2026-02-27	10-K	26-006076
25	current liabilities	us-gaap:LiabilitiesCurrent	$3.3B	2025-12-31	2026-02-27	10-K	26-006076
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$235.0M	2025-12-31	2026-02-27	10-K	26-006076
27	liabilities	us-gaap:Liabilities	$6.9B	2025-12-31	2026-02-27	10-K	26-006076
28	depreciation amortization	us-gaap:Depreciation	$345.0M	2025-12-31	2026-02-27	10-K	26-006076
29	interest expense	us-gaap:InterestExpense	$181.0M	2025-12-31	2026-02-27	10-K	26-006076
30	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$214.0M	2025-12-31	2026-02-27	10-K	26-006076
31	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$450.0M	2024-12-31	2026-02-27	10-K	26-006076
32	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$312.0M	2024-12-31	2026-02-27	10-K	26-006076
33	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$476.0M	2023-12-31	2026-02-27	10-K	26-006076
34	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$427.0M	2023-12-31	2026-02-27	10-K	26-006076
35	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$649.0M	2022-12-31	2025-02-20	10-K	25-004554
36	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$440.0M	2022-12-31	2025-02-20	10-K	25-004554
37	current assets	us-gaap:AssetsCurrent	$3.7B	2024-12-31	2026-02-27	10-K	26-006076
38	current liabilities	us-gaap:LiabilitiesCurrent	$2.6B	2024-12-31	2026-02-27	10-K	26-006076
39	assets	us-gaap:Assets	$7.9B	2023-12-31	2026-02-27	10-K	26-006076
40	assets	us-gaap:Assets	$7.4B	2022-12-31	2025-02-20	10-K	25-004554
41	shares outstanding	dei:EntityCommonStockSharesOutstanding	108,642,939	2026-02-06	2026-02-27	10-K	26-006076
42	shares outstanding	dei:EntityCommonStockSharesOutstanding	145,037,398	2025-02-03	2025-02-20	10-K	25-004554

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