Valmont Industries Inc.

VMI

NYSE; manufacturing; SIC 3440, Fabricated Structural Metal Products; CIK 0000102729

B

second fifth of 255 graded peers in manufacturing

rank 60 of 255; percentile 23.2; sampling error 3.0 points; lower is stronger

A B C D E

B, the elk



Scoreboard	
Profitability	B percentile 35.0
Solvency	B percentile 32.1
Growth and financing	C percentile 51.4
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 $3.4B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress
Inputs computable	12 of 14
Graded from	filings received through Feb 24, 2026 238 days before the rescan; latest periodic filing 10-Q received Jul 28, 2026
Last close	$452.09 2026-10-19; market equity $8.7B; 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 24, 2026

Valmont Industries, Inc., along with its subsidiaries (collectively referred to as the "Company," "Valmont," "we," "us," or "our"), is a diversified manufacturer of products and services for infrastructure and agriculture markets. Founded in 1946 and headquartered in Omaha, Nebraska, our purpose is to conserve resources and improve life. We have been publicly traded since 1968, with our shares listed on the New York Stock Exchange under the ticker symbol "VMI.

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 35.0						
Gross profitability	36.8%	21.9%		13.5	275	2025-12-27
Return on invested capital	17.9%	9.7%		20.2	100	2025-12-27
Accruals ratio	(3.2%)	(3.6%)		53.6	307	2025-12-27
Gross margin stability, five years	2.2 pts	2.1 pts		52.6	229	2025-12-27

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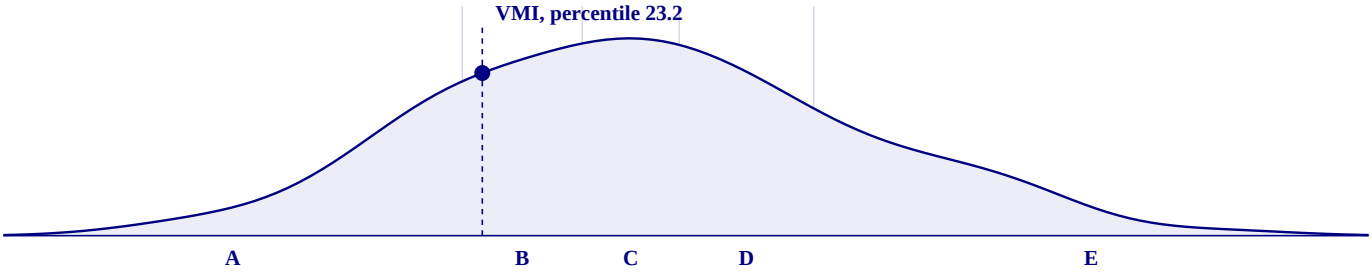
Solvency, sleeve percentile 32.1					
Twelve-month failure probability	not computable	0.04%			
latest liabilities, cash plus short-term investments, book equity, and shares are required					
Altman Z double-prime	6.80	3.66	18.2	243	2025-12-27
Net debt to EBITDA	1.21x	1.78x	33.3	121	2025-12-27
Interest coverage	not computable	5.09x			
latest aligned inputs end 2023-12-30; latest annual assets end 2025-12-27					
Current ratio	2.35x	2.25x	44.9	324	2025-12-27
Growth and financing, sleeve percentile 51.4					
Revenue growth, three-year compound	(1.9%)	2.2%	68.3	269	2025-12-27
Free cash flow growth, three-year compound	10.2%	13.9%	59.4	139	2025-12-27
Reinvestment rate	44.3%	26.4%	37.7	139	2025-12-27
Asset growth, three years	(1.8%)	4.4%	74.7	278	2025-12-27
Net share issuance, one year	(2.5%)	0.01%	17.0	242	2026-02-20

Among 255 peers

manufacturing; 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
55	Idex Corp. (IEX)	21.3	A/B	
56	Curtiss Wright Corp. (CW)	21.7	A/B	
57	Donaldson Co. Inc. (DCI)	22.0	A/B	
58	Quanex Building Products Corp. (NX)	22.4	A/B	
59	Middleby Corp. (MIDD)	22.8	A/B	
60	Valmont Industries Inc. (VMI)	23.2	B	
61	AAR Corp. (AIR)	23.6	B	
62	Aptargroup, Inc. (ATR)	24.0	B	
63	AeroVironment Inc. (AVAV)	24.4	B	
64	Griffon Corp. (GFF)	24.8	B	
65	Armstrong World Industries Inc. (AWI)	25.2	B	

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	21.5%	13.7%	56
Distance from 52-week high	(22.5%)	(24.8%)	55
EBIT to enterprise value	4.4%	4.0%	52
Free cash flow yield	3.6%	3.5%	52
Book value to price	0.20	0.36	25
Sales to price	0.47	0.55	43
Composite equity issuance, five years	(14.0%)	(9.5%)	35
Relative strength against the sector, log excess return	0.06	(0.00)	56

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Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 7 of 9, period end 2025-12-27	
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	$139.1M
Operating cash flow, four quarters	$475.3M
Months of runway	not finite
Days since last periodic filing	84 (10-Q received Jul 28, 2026)
Median daily dollar volume, 63 sessions	$85.3M

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	$1.2B	2025-12-27	2026-02-24	10-K	26-000007
2	assets	us-gaap:Assets	$3.4B	2025-12-27	2026-02-24	10-K	26-000007
3	operating income	us-gaap:OperatingIncomeLoss	$415.6M	2025-12-27	2026-02-24	10-K	26-000007
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$377.6M	2025-12-27	2026-02-24	10-K	26-000007
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$23.9M	2025-12-27	2026-02-24	10-K	26-000007
6	total debt	us-gaap:LongTermDebt	$795.7M	2025-12-27	2026-02-24	10-K	26-000007
7	book equity	us-gaap:StockholdersEquity	$1.6B	2025-12-27	2026-02-24	10-K	26-000007
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$187.1M	2025-12-27	2026-02-24	10-K	26-000007
9	total debt	us-gaap:LongTermDebt	$730.6M	2024-12-28	2026-02-24	10-K	26-000007
10	book equity	us-gaap:StockholdersEquity	$1.5B	2024-12-28	2026-02-24	10-K	26-000007
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$164.3M	2024-12-28	2026-02-24	10-K	26-000007
12	net income	us-gaap:NetIncomeLoss	$350.3M	2025-12-27	2026-02-24	10-K	26-000007
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$456.5M	2025-12-27	2026-02-24	10-K	26-000007
14	assets	us-gaap:Assets	$3.3B	2024-12-28	2026-02-24	10-K	26-000007
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.1B	2025-12-27	2026-02-24	10-K	26-000007
16	gross profit	us-gaap:GrossProfit	$1.2B	2024-12-28	2026-02-24	10-K	26-000007
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.1B	2024-12-28	2026-02-24	10-K	26-000007
18	gross profit	us-gaap:GrossProfit	$1.2B	2023-12-30	2026-02-24	10-K	26-000007
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.2B	2023-12-30	2026-02-24	10-K	26-000007
20	gross profit	us-gaap:GrossProfit	$1.1B	2022-12-31	2025-02-25	10-K	25-000009
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.3B	2022-12-31	2025-02-25	10-K	25-000009
22	gross profit	us-gaap:GrossProfit	$883.9M	2021-12-25	2024-02-28	10-K	24-000013
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$3.5B	2021-12-25	2024-02-28	10-K	24-000013
24	current assets	us-gaap:AssetsCurrent	$1.7B	2025-12-27	2026-02-24	10-K	26-000007
25	current liabilities	us-gaap:LiabilitiesCurrent	$731.6M	2025-12-27	2026-02-24	10-K	26-000007
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$3.2B	2025-12-27	2026-02-24	10-K	26-000007
27	liabilities	us-gaap:Liabilities	$1.7B	2025-12-27	2026-02-24	10-K	26-000007
28	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$88.5M	2025-12-27	2026-02-24	10-K	26-000007
29	operating income	us-gaap:OperatingIncomeLoss	$291.6M	2023-12-30	2026-02-24	10-K	26-000007
30	interest expense	us-gaap:InterestExpense	$56.8M	2023-12-30	2024-02-28	10-K	24-000013
31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$145.0M	2025-12-27	2026-02-24	10-K	26-000007

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32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$572.7M	2024-12-28	2026-02-24	10-K	26-000007
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$79.5M	2024-12-28	2026-02-24	10-K	26-000007
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$306.8M	2023-12-30	2026-02-24	10-K	26-000007
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$96.8M	2023-12-30	2026-02-24	10-K	26-000007
36	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$326.3M	2022-12-31	2025-02-25	10-K	25-000009
37	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$93.3M	2022-12-31	2025-02-25	10-K	25-000009
38	current assets	us-gaap:AssetsCurrent	$1.7B	2024-12-28	2026-02-24	10-K	26-000007
39	current liabilities	us-gaap:LiabilitiesCurrent	$811.4M	2024-12-28	2026-02-24	10-K	26-000007
40	assets	us-gaap:Assets	$3.5B	2023-12-30	2025-02-25	10-K	25-000009
41	assets	us-gaap:Assets	$3.6B	2022-12-31	2024-02-28	10-K	24-000013
42	shares outstanding	dei:EntityCommonStockSharesOutstanding	19,535,262	2026-02-20	2026-02-24	10-K	26-000007
43	shares outstanding	dei:EntityCommonStockSharesOutstanding	20,045,509	2025-02-21	2025-02-25	10-K	25-000009

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