# Timken Co.

**TKR**

NYSE; manufacturing; SIC 3562, Ball & Roller Bearings; CIK 0000098362

**C**

**middle fifth of 255 graded peers in manufacturing**

rank 141 of 255; percentile 55.1; sampling error 3.0 points; lower is stronger

A B C D E

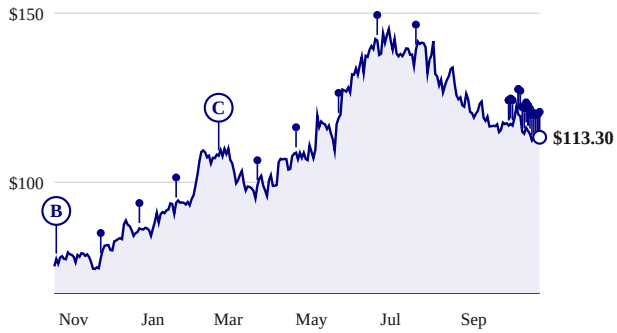
**C, the tortoise**



## Scoreboard

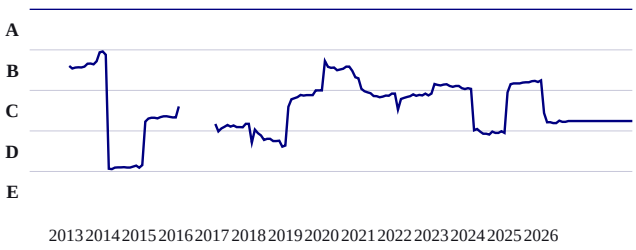
| | |
|---|---|
| **Profitability** | C<br>percentile 49.2 |
| **Solvency** | C<br>percentile 47.2 |
| **Growth and financing** | C<br>percentile 55.1 |
| **Reliability** | 0.94 AUC<br>filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025 |
| **Peer failure rate** | 0.52% a year<br>Item 1.03 bankruptcies, same asset band, 2012 to 2025 |
| **Size band** | over $2.67B assets<br>total assets $6.7B |
| **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 Feb 13, 2026<br>250 days before the rescan; latest periodic filing 10-Q received Aug 4, 2026 |
| **Last close** | $113.27<br>2026-10-20; market equity $7.8B; 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 13, 2026*

As used herein, the term "Timken" or the "Company" refers to The Timken Company and its subsidiaries unless the context otherwise dictates. Timken designs and manages a portfolio of engineered bearings and industrial motion products, and provides related services. The Company's growing portfolio features many strong brands, including Timken®, GGB®, Philadelphia Gear®, Cone Drive®, CGI®, Rollon®, Nadella®, Rosa Sistemi®, Diamond®, Drives®, Groeneveld®, BEKA®, Des-Case®, Lovejoy®, PT Tech®, Torsion Control Products® and Lagersmit®. The Company was founded in 1899 by Henry Timken, who received two patents on the design of a tapered roller bearing.

## 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 49.2** | | | | | | |
| Gross profitability | 20.9% | 21.9% | | 51.5 | 275 | 2025-12-31 |
| Return on invested capital | 8.9% | 9.7% | | 54.5 | 100 | 2025-12-31 |

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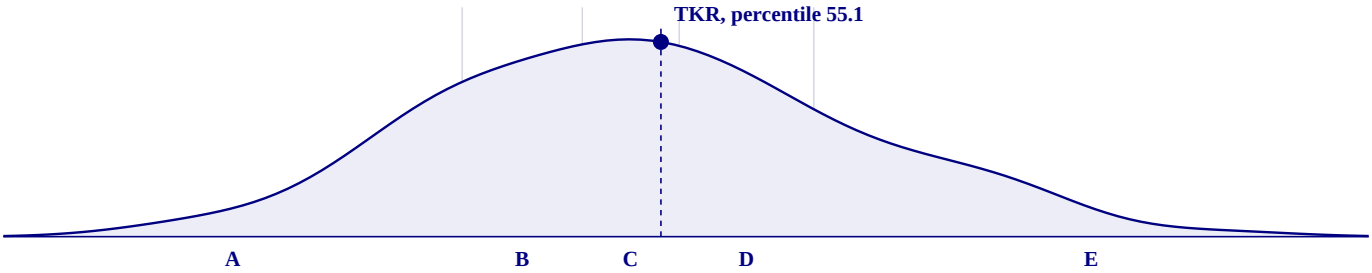
| | | | | | |
|---|---|---|---|---|---|
| Accruals ratio | (4.1%) | (3.6%) | 47.7 | 307 | 2025-12-31 |
| Gross margin stability, five years | 1.9 pts | 2.1 pts | 43.0 | 229 | 2025-12-31 |
| **Solvency, sleeve percentile 47.2** | | | | | |
| Twelve-month failure probability | not computable | 0.04% | | | |
| *liabilities and a nearby cover-page share count are required at 2026-06-30* | | | | | |
| Altman Z double-prime | not computable | 3.66 | | | |
| *one or more required annual facts are missing* | | | | | |
| Net debt to EBITDA | 1.99x | 1.78x | 59.2 | 121 | 2025-12-31 |
| Interest coverage | not computable | 5.09x | | | |
| *latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31* | | | | | |
| Current ratio | 2.82x | 2.25x | 35.3 | 324 | 2025-12-31 |
| **Growth and financing, sleeve percentile 55.1** | | | | | |
| Revenue growth, three-year compound | 0.6% | 2.2% | 57.8 | 269 | 2025-12-31 |
| Free cash flow growth, three-year compound | 12.5% | 13.9% | 55.1 | 139 | 2025-12-31 |
| Reinvestment rate | (24.2%) | 26.4% | 80.4 | 139 | 2025-12-31 |
| Asset growth, three years | 5.0% | 4.4% | 44.8 | 278 | 2025-12-31 |
| Net share issuance, one year | (0.7%) | 0.01% | 37.3 | 242 | 2026-01-31 |

## 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 |
|---|---|---|---|---|
| 136 | Eastern Co. (EML) | 53.1 | C | |
| 137 | Hayward Holdings, Inc. (HAYW) | 53.5 | C | |
| 138 | General Dynamics Corp. (GD) | 53.9 | C | |
| 139 | Owens Corning (OC) | 54.3 | C | |
| 140 | Greenland Technologies Holding Corp. (GTEC) | 54.7 | C | dilution, fortress balance sheet |
| 141 | Timken Co. (TKR) | 55.1 | C | |
| 142 | nVent Electric plc (NVT) | 55.5 | C | |
| 143 | Dover Corp. (DOV) | 55.9 | C | |
| 144 | Pentair plc (PNR) | 56.3 | C | |
| 145 | Trio-Tech International (TRT) | 56.7 | C | fortress balance sheet |
| 146 | Northern Technologies International Corp. (NTIC) | 57.1 | C/D | |

## What the price implies

*at the 2026-10-20 close; none of these enters the grade*

| Measure | Value | Peer median | Percentile |
|---|---|---|---|
| Twelve-month price change, skipping the latest month | 62.4% | 13.7% | 82 |
| Distance from 52-week high | (22.0%) | (25.5%) | 57 |
| EBIT to enterprise value | 5.7% | 4.1% | 69 |
| Free cash flow yield | 5.2% | 3.4% | 70 |
| Book value to price | 0.41 | 0.35 | 54 |
| Sales to price | 0.58 | 0.55 | 53 |

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| | | | |
|---|---|---|---|
| Composite equity issuance, five years | (18.3%) | (9.5%) | 24 |
| Relative strength against the sector, log excess return | 0.35 | (0.00) | 82 |

## Diagnostics

*shown on every report; none enters the grade*

| Measure | Value |
|---|---|
| **Piotroski F-score 6 of 9, period end 2025-12-31** | |
| 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 | pass |
| Current ratio improved | fail |
| No new shares issued | pass |
| Gross margin improved | fail |
| Asset turnover improved | pass |
| **Cash, filings, liquidity** | |
| Cash and equivalents | $399.1M |
| Operating cash flow, four quarters | $530.8M |
| Months of runway | not finite |
| Days since last periodic filing | 78 (10-Q received Aug 4, 2026) |
| Median daily dollar volume, 63 sessions | $103.0M |

## 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 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $4.6B | 2025-12-31 | 2026-02-13 | 10-K | 26-000012 |
| 2 | cost of revenue | us-gaap:CostOfGoodsAndServicesSold | $3.2B | 2025-12-31 | 2026-02-13 | 10-K | 26-000012 |
| 3 | assets | us-gaap:Assets | $6.7B | 2025-12-31 | 2026-02-13 | 10-K | 26-000012 |
| 4 | operating income | us-gaap:OperatingIncomeLoss | $540.6M | 2025-12-31 | 2026-02-13 | 10-K | 26-000012 |
| 5 | pretax income | us-gaap:IncomeLossFromContinuingOperationsBeforeInc... | $416.0M | 2025-12-31 | 2026-02-13 | 10-K | 26-000012 |
| 6 | income tax | us-gaap:IncomeTaxExpenseBenefit | $98.7M | 2025-12-31 | 2026-02-13 | 10-K | 26-000012 |
| 7 | total debt | us-gaap:LongTermDebt | $1.9B | 2025-12-31 | 2026-02-13 | 10-K | 26-000012 |
| 8 | book equity | us-gaap:StockholdersEquity | $3.2B | 2025-12-31 | 2026-02-13 | 10-K | 26-000012 |
| 9 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $364.4M | 2025-12-31 | 2026-02-13 | 10-K | 26-000012 |
| 10 | total debt | us-gaap:LongTermDebt | $2.1B | 2024-12-31 | 2026-02-13 | 10-K | 26-000012 |
| 11 | book equity | us-gaap:StockholdersEquity | $2.8B | 2024-12-31 | 2026-02-13 | 10-K | 26-000012 |
| 12 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $373.2M | 2024-12-31 | 2026-02-13 | 10-K | 26-000012 |
| 13 | net income | us-gaap:NetIncomeLoss | $288.4M | 2025-12-31 | 2026-02-13 | 10-K | 26-000012 |
| 14 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $554.3M | 2025-12-31 | 2026-02-13 | 10-K | 26-000012 |
| 15 | assets | us-gaap:Assets | $6.4B | 2024-12-31 | 2026-02-13 | 10-K | 26-000012 |
| 16 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $4.6B | 2024-12-31 | 2026-02-13 | 10-K | 26-000012 |
| 17 | cost of revenue | us-gaap:CostOfGoodsAndServicesSold | $3.1B | 2024-12-31 | 2026-02-13 | 10-K | 26-000012 |
| 18 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $4.8B | 2023-12-31 | 2026-02-13 | 10-K | 26-000012 |
| 19 | cost of revenue | us-gaap:CostOfGoodsAndServicesSold | $3.3B | 2023-12-31 | 2026-02-13 | 10-K | 26-000012 |
| 20 | gross profit | us-gaap:GrossProfit | $1.3B | 2022-12-31 | 2023-02-16 | 10-K | 23-000040 |
| 21 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $4.5B | 2022-12-31 | 2025-02-20 | 10-K | 25-000055 |
| 22 | gross profit | us-gaap:GrossProfit | $1.1B | 2021-12-31 | 2023-02-16 | 10-K | 23-000040 |
| 23 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $4.1B | 2021-12-31 | 2024-02-26 | 10-K | 24-000042 |
| 24 | depreciation amortization | us-gaap:DepreciationDepletionAndAmortization | $230.1M | 2025-12-31 | 2026-02-13 | 10-K | 26-000012 |
| 25 | operating income | us-gaap:OperatingIncomeLoss | $657.1M | 2023-12-31 | 2026-02-13 | 10-K | 26-000012 |
| 26 | interest expense | us-gaap:InterestExpense | $110.7M | 2023-12-31 | 2024-02-26 | 10-K | 24-000042 |
| 27 | current assets | us-gaap:AssetsCurrent | $2.6B | 2025-12-31 | 2026-02-13 | 10-K | 26-000012 |
| 28 | current liabilities | us-gaap:LiabilitiesCurrent | $922.1M | 2025-12-31 | 2026-02-13 | 10-K | 26-000012 |
| 29 | capital expenditure | us-gaap:PaymentsToAcquireProductiveAssets | $148.2M | 2025-12-31 | 2026-02-13 | 10-K | 26-000012 |

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| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| 30 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $475.7M | 2024-12-31 | 2026-02-13 | 10-K | 26-000012 |
| 31 | capital expenditure | us-gaap:PaymentsToAcquireProductiveAssets | $170.0M | 2024-12-31 | 2026-02-13 | 10-K | 26-000012 |
| 32 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $545.2M | 2023-12-31 | 2026-02-13 | 10-K | 26-000012 |
| 33 | capital expenditure | us-gaap:PaymentsToAcquireProductiveAssets | $187.8M | 2023-12-31 | 2026-02-13 | 10-K | 26-000012 |
| 34 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $463.8M | 2022-12-31 | 2025-02-20 | 10-K | 25-000055 |
| 35 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $178.4M | 2022-12-31 | 2023-02-16 | 10-K | 23-000040 |
| 36 | current assets | us-gaap:AssetsCurrent | $2.5B | 2024-12-31 | 2026-02-13 | 10-K | 26-000012 |
| 37 | current liabilities | us-gaap:LiabilitiesCurrent | $820.5M | 2024-12-31 | 2026-02-13 | 10-K | 26-000012 |
| 38 | assets | us-gaap:Assets | $6.5B | 2023-12-31 | 2025-02-20 | 10-K | 25-000055 |
| 39 | assets | us-gaap:Assets | $5.8B | 2022-12-31 | 2024-02-26 | 10-K | 24-000042 |
| 40 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 69,544,299 | 2026-01-31 | 2026-02-13 | 10-K | 26-000012 |
| 41 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 70,001,123 | 2025-01-31 | 2025-02-20 | 10-K | 25-000055 |

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