# Sensata Technologies Holding plc

**ST**

NYSE; business equipment; SIC 3823, Industrial Instruments For Measurement, Display, and Control; CIK 0001477294

**D**

**fourth fifth of 496 graded peers in business equipment**

rank 362 of 496; percentile 72.9; sampling error 2.2 points; lower is stronger

A B C D E

**D, the sloth**



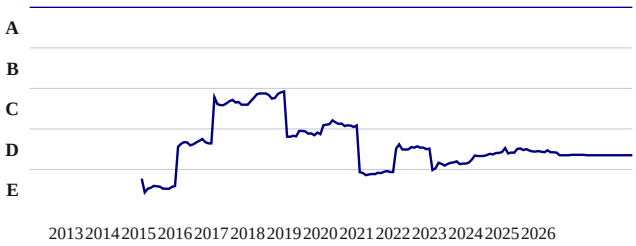
| Scoreboard | |
|---|---|
| **Profitability** | C/D<br>percentile 58.9 |
| **Solvency** | C<br>percentile 51.8 |
| **Growth and financing** | D<br>percentile 63.6 |
| **Reliability** | 0.94 AUC<br>filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025 |
| **Peer failure rate** | 0.52% a year<br>Item 1.03 bankruptcies, same asset band, 2012 to 2025 |
| **Size band** | over $2.67B assets<br>total assets $6.8B |
| **Standard universe** | inside<br>revenue above $1M and assets above $10M |
| **Warnings** | none triggered<br>not computable: distress |
| **Inputs computable** | 12 of 14 |
| **Graded from** | filings received through Feb 27, 2026<br>237 days before the rescan; latest periodic filing 10-Q received Jul 29, 2026 |
| **Last close** | $42.30<br>2026-10-21; market equity $6.2B; 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*

included elsewhere in this Report for discussion of our assessment of seasonality related to our business. Refer to Item 3: Legal Proceedings included elsewhere in this Report for discussion of legal proceedings related to our business. Our discussion and analysis of results of operations are based upon our Financial Statements included elsewhere in this Report. The Financial Statements have been prepared in accordance with U.S. GAAP. The preparation of the Financial Statements requires us to make estimates and judgments that affect the amounts reported therein.

## 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 58.9** | | | | | | |
| Gross profitability | 16.1% | 28.6% | | 69.7 | 556 | 2025-12-31 |
| Return on invested capital | 1.1% | 11.2% | | 78.2 | 134 | 2025-12-31 |
| Accruals ratio | (8.5%) | (7.3%) | | 48.9 | 616 | 2025-12-31 |

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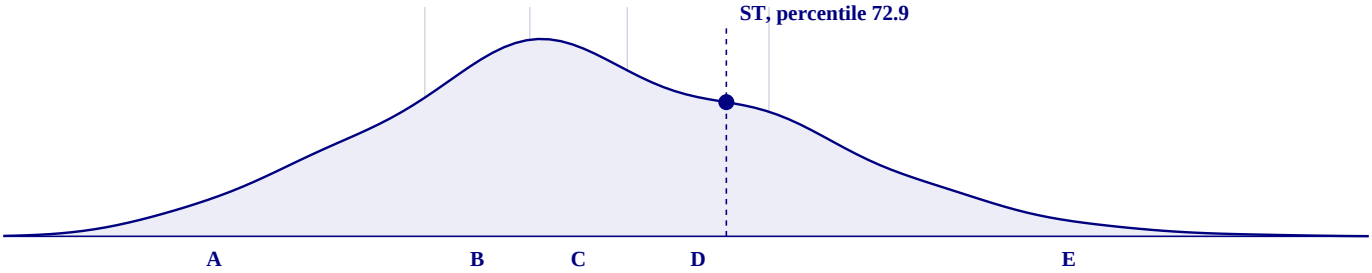
| | | | | | |
|---|---|---|---|---|---|
| Gross margin stability, five years | 1.7 pts | 2.3 pts | 38.8 | 426 | 2025-12-31 |
| **Solvency, sleeve percentile 51.8** | | | | | |
| Twelve-month failure probability | not computable | 0.05% | | | |
| *latest liabilities, cash plus short-term investments, book equity, and shares are required* | | | | | |
| Altman Z double-prime | 3.27 | 2.15 | 33.8 | 563 | 2025-12-31 |
| Net debt to EBITDA | 4.60x | 1.11x | 84.2 | 147 | 2025-12-31 |
| Interest coverage | not computable | 3.77x | | | |
| *latest aligned inputs end 2024-12-31; latest annual assets end 2025-12-31* | | | | | |
| Current ratio | 2.57x | 2.01x | 37.5 | 660 | 2025-12-31 |
| **Growth and financing, sleeve percentile 63.6** | | | | | |
| Revenue growth, three-year compound | (2.8%) | 6.4% | 74.8 | 536 | 2025-12-31 |
| Free cash flow growth, three-year compound | 16.4% | 18.1% | 51.7 | 264 | 2025-12-31 |
| Reinvestment rate | (367.9%) | 14.3% | 91.9 | 224 | 2025-12-31 |
| Asset growth, three years | (8.3%) | 5.0% | 80.5 | 561 | 2025-12-31 |
| Net share issuance, one year | (2.5%) | 0.5% | 19.1 | 409 | 2026-01-29 |

## Among 496 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 |
|---|---|---|---|---|
| 357 | Intellinetics, Inc. (INLX) | 71.9 | D | |
| 358 | Unisys Corp. (UIS) | 72.1 | D | |
| 359 | PAR Technology Corp. (PAR) | 72.3 | D | |
| 360 | Corsair Gaming, Inc. (CRSR) | 72.5 | D | |
| 361 | Mercury Systems Inc. (MRCY) | 72.7 | D | |
| 362 | Sensata Technologies Holding plc (ST) | 72.9 | D | |
| 363 | DXC Technology Co. (DXC) | 73.1 | D | |
| 364 | Geospace Technologies Corp. (GEOS) | 73.3 | D | short runway, late filer, fortress balance sheet |
| 365 | Cohu Inc. (COHU) | 73.5 | D | |
| 366 | Gen Digital Inc. (GEN) | 73.8 | D | |
| 367 | Gen Digital Inc. (GENVR) | 73.8 | D | |

## What the price implies

*at the 2026-10-21 close; none of these enters the grade*

| Measure | Value | Peer median | Percentile |
|---|---|---|---|
| Twelve-month price change, skipping the latest month | 36.0% | 2.2% | 72 |
| Distance from 52-week high | (21.0%) | (30.2%) | 64 |
| EBIT to enterprise value | 2.8% | 1.5% | 61 |
| Free cash flow yield | 8.0% | 2.7% | 80 |
| Book value to price | 0.48 | 0.25 | 72 |
| Sales to price | 0.60 | 0.32 | 66 |
| Composite equity issuance, five years | (13.8%) | 4.2% | 20 |

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| | | | |
|---|---|---|---|
| Relative strength against the sector, log excess return | 0.02 | (0.26) | 72 |

## 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 | $403.3M |
| Operating cash flow, four quarters | $693.9M |
| Months of runway | not finite |
| Days since last periodic filing | 85 (10-Q received Jul 29, 2026) |
| Median daily dollar volume, 63 sessions | $52.0M |

## 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... | $3.7B | 2025-12-31 | 2026-02-27 | 10-K | 26-000007 |
| 2 | cost of revenue | us-gaap:CostOfRevenue | $2.6B | 2025-12-31 | 2026-02-27 | 10-K | 26-000007 |
| 3 | assets | us-gaap:Assets | $6.8B | 2025-12-31 | 2026-02-27 | 10-K | 26-000007 |
| 4 | operating income | us-gaap:OperatingIncomeLoss | $237.5M | 2025-12-31 | 2026-02-27 | 10-K | 26-000007 |
| 5 | pretax income | us-gaap:IncomeLossFromContinuingOperationsBeforeInc... | $123.3M | 2025-12-31 | 2026-02-27 | 10-K | 26-000007 |
| 6 | income tax | us-gaap:IncomeTaxExpenseBenefit | $92.0M | 2025-12-31 | 2026-02-27 | 10-K | 26-000007 |
| 7 | total debt | us-gaap:LongTermDebt | $2.8B | 2025-12-31 | 2026-02-27 | 10-K | 26-000007 |
| 8 | book equity | us-gaap:StockholdersEquity | $2.8B | 2025-12-31 | 2026-02-27 | 10-K | 26-000007 |
| 9 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $573.0M | 2025-12-31 | 2026-02-27 | 10-K | 26-000007 |
| 10 | total debt | us-gaap:LongTermDebt | $3.2B | 2024-12-31 | 2025-02-28 | 10-K | 25-000022 |
| 11 | book equity | us-gaap:StockholdersEquity | $2.9B | 2024-12-31 | 2026-02-27 | 10-K | 26-000007 |
| 12 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $593.7M | 2024-12-31 | 2026-02-27 | 10-K | 26-000007 |
| 13 | net income | us-gaap:NetIncomeLoss | $31.3M | 2025-12-31 | 2026-02-27 | 10-K | 26-000007 |
| 14 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $621.5M | 2025-12-31 | 2026-02-27 | 10-K | 26-000007 |
| 15 | assets | us-gaap:Assets | $7.1B | 2024-12-31 | 2026-02-27 | 10-K | 26-000007 |
| 16 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $3.9B | 2024-12-31 | 2026-02-27 | 10-K | 26-000007 |
| 17 | cost of revenue | us-gaap:CostOfRevenue | $2.8B | 2024-12-31 | 2026-02-27 | 10-K | 26-000007 |
| 18 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $4.1B | 2023-12-31 | 2026-02-27 | 10-K | 26-000007 |
| 19 | cost of revenue | us-gaap:CostOfRevenue | $2.8B | 2023-12-31 | 2026-02-27 | 10-K | 26-000007 |
| 20 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $4.0B | 2022-12-31 | 2025-02-28 | 10-K | 25-000022 |
| 21 | cost of revenue | us-gaap:CostOfRevenue | $2.7B | 2022-12-31 | 2025-02-28 | 10-K | 25-000022 |
| 22 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $3.8B | 2021-12-31 | 2024-02-29 | 10-K | 24-000020 |
| 23 | cost of revenue | us-gaap:CostOfRevenue | $2.5B | 2021-12-31 | 2024-02-29 | 10-K | 24-000020 |
| 24 | current assets | us-gaap:AssetsCurrent | $2.0B | 2025-12-31 | 2026-02-27 | 10-K | 26-000007 |
| 25 | current liabilities | us-gaap:LiabilitiesCurrent | $775.1M | 2025-12-31 | 2026-02-27 | 10-K | 26-000007 |
| 26 | retained earnings | us-gaap:RetainedEarningsAccumulatedDeficit | $2.3B | 2025-12-31 | 2026-02-27 | 10-K | 26-000007 |
| 27 | liabilities | us-gaap:Liabilities | $4.0B | 2025-12-31 | 2026-02-27 | 10-K | 26-000007 |
| 28 | depreciation amortization | us-gaap:DepreciationDepletionAndAmortization | $256.4M | 2025-12-31 | 2026-02-27 | 10-K | 26-000007 |
| 29 | operating income | us-gaap:OperatingIncomeLoss | $149.3M | 2024-12-31 | 2026-02-27 | 10-K | 26-000007 |
| 30 | interest expense | us-gaap:InterestExpense | $155.8M | 2024-12-31 | 2025-02-28 | 10-K | 25-000022 |

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| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| 31 | capital expenditure | us-gaap:PaymentsToAcquireProductiveAssets | $131.2M | 2025-12-31 | 2026-02-27 | 10-K | 26-000007 |
| 32 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $551.5M | 2024-12-31 | 2026-02-27 | 10-K | 26-000007 |
| 33 | capital expenditure | us-gaap:PaymentsToAcquireProductiveAssets | $158.6M | 2024-12-31 | 2026-02-27 | 10-K | 26-000007 |
| 34 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $456.7M | 2023-12-31 | 2026-02-27 | 10-K | 26-000007 |
| 35 | capital expenditure | us-gaap:PaymentsToAcquireProductiveAssets | $184.6M | 2023-12-31 | 2026-02-27 | 10-K | 26-000007 |
| 36 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $460.6M | 2022-12-31 | 2025-02-28 | 10-K | 25-000022 |
| 37 | capital expenditure | us-gaap:PaymentsToAcquireProductiveAssets | $150.1M | 2022-12-31 | 2025-02-28 | 10-K | 25-000022 |
| 38 | current assets | us-gaap:AssetsCurrent | $2.0B | 2024-12-31 | 2026-02-27 | 10-K | 26-000007 |
| 39 | current liabilities | us-gaap:LiabilitiesCurrent | $711.4M | 2024-12-31 | 2026-02-27 | 10-K | 26-000007 |
| 40 | assets | us-gaap:Assets | $7.7B | 2023-12-31 | 2025-02-28 | 10-K | 25-000022 |
| 41 | assets | us-gaap:Assets | $8.8B | 2022-12-31 | 2024-02-29 | 10-K | 24-000020 |
| 42 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 145,799,544 | 2026-01-29 | 2026-02-27 | 10-K | 26-000007 |
| 43 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 149,551,960 | 2025-02-07 | 2025-02-28 | 10-K | 25-000022 |

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