Constellation Brands, Inc.

STZ

NYSE; consumer nondurables; SIC 2080, Beverages; CIK 0000016918

D

fourth fifth of 124 graded peers in consumer nondurables

rank 82 of 124; percentile 65.9; sampling error 3.8 points; lower is stronger

A B C D E

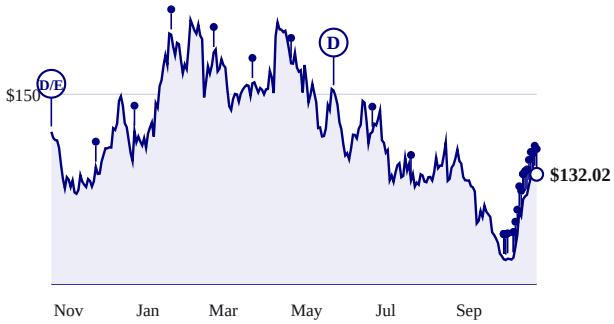
D, the sloth



Scoreboard

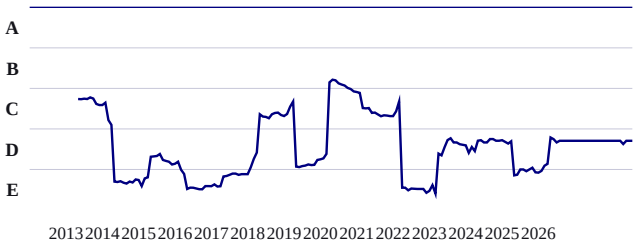
Profitability	B/C percentile 41.6
Solvency	C/D percentile 60.9
Growth and financing	C/D percentile 58.1
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $21.9B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: dilution, distress
Inputs computable	11 of 14
Graded from	filings received through Apr 22, 2026 183 days before the rescan; latest periodic filing 10-Q received Oct 7, 2026
Last close	$132.03 2026-10-21; market equity $0; 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 Apr 22, 2026

We are an international producer and marketer of beer, wine, and spirits with operations in the U.S., Mexico, New Zealand, and Italy with powerful, consumer-connected, high-quality brands like Modelo Especial, Corona Extra, Pacifico, Victoria, Kim Crawford, Ruffino, The Prisoner Wine Company, Robert Mondavi Winery, Mi CAMPO, and High West. In the U.S., we are one of the top dollar share gainers among beverage alcohol suppliers. We are also the second-largest beer company and have the #1 beer brand, Modelo Especial, in dollar sales in the U.S. We continued to strengthen our leadership position in the U.S. beer market as the #1 dollar share gainer in the overall U.S.

The fourteen inputs

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

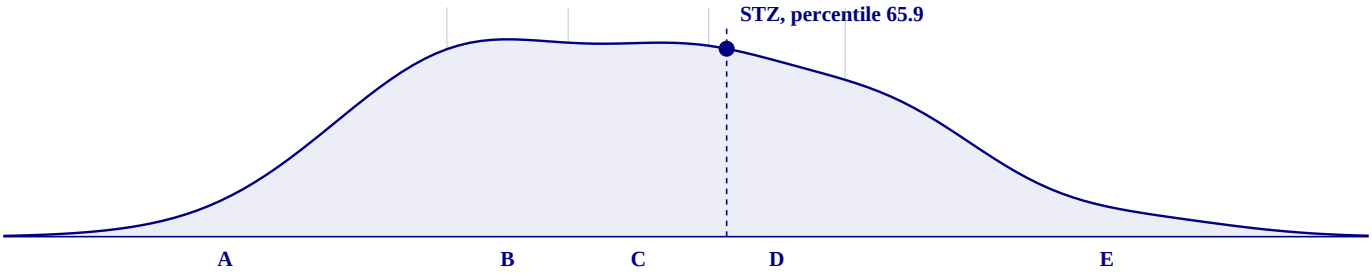
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 41.6						
Gross profitability	21.5%	29.8%		60.3	142	2026-02-28
Return on invested capital	11.2%	5.6%		31.2	49	2026-02-28

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Accruals ratio	(4.5%)	(5.0%)		56.8	149	2026-02-28
Gross margin stability, five years	1.1 pts	1.9 pts		18.3	116	2026-02-28
Solvency, sleeve percentile 60.9						
Twelve-month failure probability	not computable	0.03%				
liabilities and a nearby cover-page share count are required at 2026-08-31						
Altman Z double-prime	3.55	3.11		38.1	119	2026-02-28
Net debt to EBITDA	3.25x	2.54x		70.4	55	2026-02-28
Interest coverage	not computable	2.51x				
latest aligned inputs end 2019-02-28; latest annual assets end 2026-02-28						
Current ratio	1.08x	1.81x		74.3	153	2026-02-28
Growth and financing, sleeve percentile 58.1						
Revenue growth, three-year compound	(1.1%)	0.2%		56.8	133	2026-02-28
Free cash flow growth, three-year compound	1.4%	14.9%		75.4	66	2026-02-28
Reinvestment rate	49.3%	10.7%		30.4	70	2026-02-28
Asset growth, three years	(3.9%)	0.5%		69.9	134	2026-02-28
Net share issuance, one year	not computable	0.05%				
two annual share counts are required; found 0						

Among 124 peers

consumer nondurables; 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
77	Mccormick & Co. Inc. (MKC-V)	61.4	C/D	
78	V F Corp. (VFC)	62.6	C/D	
79	Edible Garden AG Inc. (EDBL)	63.8	D	late filer
80	Edible Garden AG Inc. (EDBLW)	63.8	D	late filer
81	Peloton Interactive, Inc. (PTON)	65.0	D	
82	Constellation Brands, Inc. (STZ)	65.9	D	
83	Willamette Valley Vineyards Inc. (WVVI)	67.1	D	
84	Willamette Valley Vineyards Inc. (WVVIP)	67.1	D	
85	Campbell'S Co. (CPB)	68.3	D	
86	Flowers Foods Inc. (FLO)	69.1	D	
87	Deluxe Corp. (DLX)	69.9	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	(0.2%)	(0.2%)	49
Distance from 52-week high	(20.8%)	(23.1%)	54
EBIT to enterprise value	not computable	4.0%	
Free cash flow yield	not computable	4.5%	
Book value to price	not computable	0.57	
Sales to price	not computable	1.26	

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Composite equity issuance, five years	not computable	(16.3%)	
Relative strength against the sector, log excess return	(0.10)	(0.10)	49

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score None of 9, period end 2026-02-28	
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	fail
Gross margin improved	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$98.5M
Operating cash flow, four quarters	$2.7B
Months of runway	not finite
Days since last periodic filing	15 (10-Q received Oct 7, 2026)
Median daily dollar volume, 63 sessions	$244.3M

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	$4.7B	2026-02-28	2026-04-22	10-K	26-000011
2	assets	us-gaap:Assets	$21.9B	2026-02-28	2026-04-22	10-K	26-000011
3	operating income	us-gaap:OperatingIncomeLoss	$2.7B	2026-02-28	2026-04-22	10-K	26-000011
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$2.4B	2026-02-28	2026-04-22	10-K	26-000011
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$621.0M	2026-02-28	2026-04-22	10-K	26-000011
6	total debt	us-gaap:LongTermDebt	$10.3B	2026-02-28	2026-04-22	10-K	26-000011
7	book equity	us-gaap:StockholdersEquity	$8.1B	2026-02-28	2026-04-22	10-K	26-000011
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$102.4M	2026-02-28	2026-04-22	10-K	26-000011
9	total debt	us-gaap:LongTermDebt	$10.7B	2025-02-28	2026-04-22	10-K	26-000011
10	book equity	us-gaap:StockholdersEquity	$6.9B	2025-02-28	2026-04-22	10-K	26-000011
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$68.1M	2025-02-28	2026-04-22	10-K	26-000011
12	net income	us-gaap:NetIncomeLoss	$1.7B	2026-02-28	2026-04-22	10-K	26-000011
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$2.7B	2026-02-28	2026-04-22	10-K	26-000011
14	assets	us-gaap:Assets	$21.7B	2025-02-28	2026-04-22	10-K	26-000011
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$9.1B	2026-02-28	2026-04-22	10-K	26-000011
16	gross profit	us-gaap:GrossProfit	$5.3B	2025-02-28	2026-04-22	10-K	26-000011
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$10.2B	2025-02-28	2026-04-22	10-K	26-000011
18	gross profit	us-gaap:GrossProfit	$5.0B	2024-02-29	2026-04-22	10-K	26-000011
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$10.0B	2024-02-29	2026-04-22	10-K	26-000011
20	gross profit	us-gaap:GrossProfit	$4.8B	2023-02-28	2025-04-23	10-K	25-000022
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$9.5B	2023-02-28	2025-04-23	10-K	25-000022
22	gross profit	us-gaap:GrossProfit	$4.7B	2022-02-28	2024-04-23	10-K	24-000054
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$8.8B	2022-02-28	2024-04-23	10-K	24-000054
24	current assets	us-gaap:AssetsCurrent	$2.9B	2026-02-28	2026-04-22	10-K	26-000011
25	current liabilities	us-gaap:LiabilitiesCurrent	$2.7B	2026-02-28	2026-04-22	10-K	26-000011
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$13.6B	2026-02-28	2026-04-22	10-K	26-000011
27	liabilities	us-gaap:Liabilities	$13.5B	2026-02-28	2026-04-22	10-K	26-000011
28	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$420.0M	2026-02-28	2026-04-22	10-K	26-000011
29	operating income	us-gaap:OperatingIncomeLoss	$2.4B	2019-02-28	2021-04-20	10-K	21-000060

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30	interest expense	us-gaap:InterestExpense	$379.1M	2019-02-28	2019-04-23	10-K	19-000024
31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$875.0M	2026-02-28	2026-04-22	10-K	26-000011
32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$3.2B	2025-02-28	2026-04-22	10-K	26-000011
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$1.2B	2025-02-28	2026-04-22	10-K	26-000011
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$2.8B	2024-02-29	2026-04-22	10-K	26-000011
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$1.3B	2024-02-29	2026-04-22	10-K	26-000011
36	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$2.8B	2023-02-28	2025-04-23	10-K	25-000022
37	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$1.0B	2023-02-28	2025-04-23	10-K	25-000022
38	current assets	us-gaap:AssetsCurrent	$3.7B	2025-02-28	2026-04-22	10-K	26-000011
39	current liabilities	us-gaap:LiabilitiesCurrent	$4.0B	2025-02-28	2026-04-22	10-K	26-000011
40	assets	us-gaap:Assets	$25.7B	2024-02-29	2025-04-23	10-K	25-000022
41	assets	us-gaap:Assets	$24.7B	2023-02-28	2024-04-23	10-K	24-000054

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