TransDigm Group Inc.

TDG

NYSE; manufacturing; SIC 3728, Aircraft Parts & Auxiliary Equipment, NEC; CIK 0001260221

C

middle fifth of 255 graded peers in manufacturing

rank 123 of 255; percentile 48.0; sampling error 3.0 points; lower is stronger

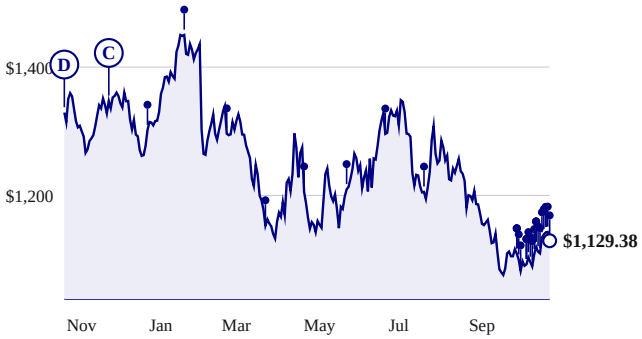
A B C D E

C, the tortoise



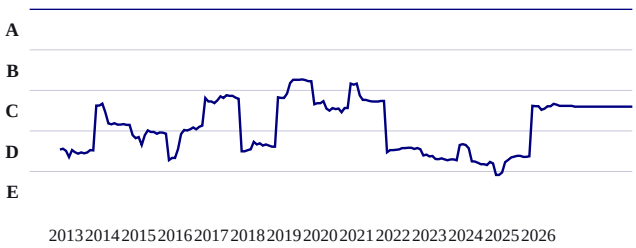
Scoreboard	
Profitability	C percentile 47.8
Solvency	D percentile 64.6
Growth and financing	B percentile 33.5
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $22.9B
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 Nov 12, 2025 344 days before the rescan; latest periodic filing 10-Q received Aug 4, 2026
Last close	$1,129.31 2026-10-21; market equity $62.4B; 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 Nov 12, 2025

TD Group, through its wholly-owned subsidiary, TransDigm Inc., is a leading global designer, producer and supplier of highly engineered aircraft components that are critical to the safe and effective operation of nearly all commercial and military aircraft worldwide. Our products are represented in nearly every commercial and military aircraft in service today. Our business is well diversified due to the broad range of products we offer to our customers. We estimate that approximately 90% of our net sales for fiscal year 2025 were generated by proprietary products. Most of our products generate significant aftermarket revenue.

The fourteen inputs

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

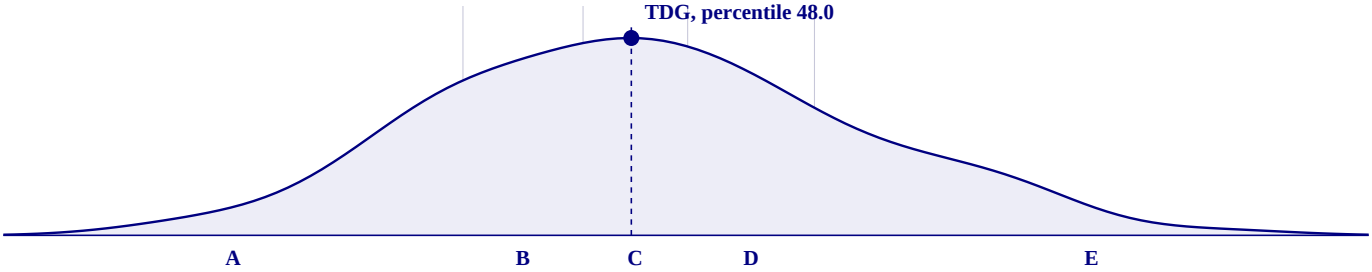
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 47.8						
Gross profitability	23.2%	21.9%		41.6	275	2025-09-30
Return on invested capital	23.1%	9.7%		9.1	100	2025-09-30
Accruals ratio	0.1%	(3.6%)		80.7	307	2025-09-30

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Gross margin stability, five years	2.7 pts	2.1 pts		59.6	229	2025-09-30
Solvency, sleeve percentile 64.6						
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	0.78	3.66		71.5	243	2025-09-30
Net debt to EBITDA	5.82x	1.78x		95.8	121	2025-09-30
Interest coverage	not computable	5.09x				
one or more required annual facts are missing						
Current ratio	3.21x	2.25x		26.6	324	2025-09-30
Growth and financing, sleeve percentile 33.5						
Revenue growth, three-year compound	17.6%	2.2%		9.3	269	2025-09-30
Free cash flow growth, three-year compound	29.9%	13.9%		25.4	139	2025-09-30
Reinvestment rate	30.3%	26.4%		47.1	139	2025-09-30
Asset growth, three years	8.2%	4.4%		30.7	278	2025-09-30
Net share issuance, one year	0.2%	0.01%		55.2	242	2025-10-31

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
118	Dnow Inc. (DNOW)	46.1	C	dilution
119	Ceco Environmental Corp. (CECO)	46.5	C	
120	Symbotic Inc. (SYM)	46.9	C	late filer
121	Zebra Technologies Corp. (ZBRA)	47.2	C	
122	Nordson Corp. (NDSN)	47.6	C	
123	TransDigm Group Inc. (TDG)	48.0	C	
124	Optical Cable Corp. (OCC)	48.4	C	
125	Hyliion Holdings Corp. (HYLN)	48.8	C	short runway, fortress balance sheet
126	Mayville Engineering Company, Inc. (MEC)	49.2	C	
127	Gates Industrial Corp. Ltd. (GTES)	49.6	C	
128	Arcosa, Inc. (ACA)	50.0	C	

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	(11.1%)	13.7%	24
Distance from 52-week high	(22.1%)	(24.1%)	55
EBIT to enterprise value	4.5%	4.0%	54
Free cash flow yield	2.9%	3.4%	43
Book value to price	(0.16)	0.35	2
Sales to price	0.14	0.55	8
Composite equity issuance, five years	(23.6%)	(9.5%)	15
Relative strength against the sector, log excess return	(0.25)	(0.00)	24

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Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 4 of 9, period end 2025-09-30	
Return on assets above zero	pass
Operating cash flow above zero	pass
Return on assets improved	fail
Operating cash flow exceeds net income	fail
Long-term leverage fell	fail
Current ratio improved	pass
No new shares issued	fail
Gross margin improved	pass
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$2.8B
Operating cash flow, four quarters	$2.2B
Months of runway	not finite
Days since last periodic filing	79 (10-Q received Aug 4, 2026)
Median daily dollar volume, 63 sessions	$420.9M

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	gross profit	us-gaap:GrossProfit	$5.3B	2025-09-30	2025-11-12	10-K	25-000081
2	assets	us-gaap:Assets	$22.9B	2025-09-30	2025-11-12	10-K	25-000081
3	operating income	us-gaap:OperatingIncomeLoss	$4.2B	2025-09-30	2025-11-12	10-K	25-000081
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$2.6B	2025-09-30	2025-11-12	10-K	25-000081
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$555.0M	2025-09-30	2025-11-12	10-K	25-000081
6	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$29.2B	2025-09-30	2025-11-12	10-K	25-000081
7	book equity	us-gaap:StockholdersEquity	-$9.7B	2025-09-30	2025-11-12	10-K	25-000081
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$2.8B	2025-09-30	2025-11-12	10-K	25-000081
9	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$24.3B	2024-09-30	2025-11-12	10-K	25-000081
10	book equity	us-gaap:StockholdersEquity	-$6.3B	2024-09-30	2025-11-12	10-K	25-000081
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$6.3B	2024-09-30	2025-11-12	10-K	25-000081
12	net income	us-gaap:NetIncomeLoss	$2.1B	2025-09-30	2025-11-12	10-K	25-000081
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$2.0B	2025-09-30	2025-11-12	10-K	25-000081
14	assets	us-gaap:Assets	$25.6B	2024-09-30	2025-11-12	10-K	25-000081
15	revenue	us-gaap:Revenues	$8.8B	2025-09-30	2025-11-12	10-K	25-000081
16	gross profit	us-gaap:GrossProfit	$4.7B	2024-09-30	2025-11-12	10-K	25-000081
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$7.9B	2024-09-30	2024-11-07	10-K	24-000083
18	gross profit	us-gaap:GrossProfit	$3.8B	2023-09-30	2025-11-12	10-K	25-000081
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$6.6B	2023-09-30	2024-11-07	10-K	24-000083
20	gross profit	us-gaap:GrossProfit	$3.1B	2022-09-30	2024-11-07	10-K	24-000083
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$5.4B	2022-09-30	2024-11-07	10-K	24-000083
22	gross profit	us-gaap:GrossProfit	$2.5B	2021-09-30	2023-11-09	10-K	23-000081
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.8B	2021-09-30	2023-11-09	10-K	23-000081
24	current assets	us-gaap:AssetsCurrent	$7.0B	2025-09-30	2025-11-12	10-K	25-000081
25	current liabilities	us-gaap:LiabilitiesCurrent	$2.2B	2025-09-30	2025-11-12	10-K	25-000081
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$10.6B	2025-09-30	2025-11-12	10-K	25-000081
27	liabilities	us-gaap:Liabilities	$32.6B	2025-09-30	2025-11-12	10-K	25-000081
28	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$367.0M	2025-09-30	2025-11-12	10-K	25-000081
29	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$222.0M	2025-09-30	2025-11-12	10-K	25-000081
30	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$2.0B	2024-09-30	2025-11-12	10-K	25-000081
31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$165.0M	2024-09-30	2025-11-12	10-K	25-000081

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32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$1.4B	2023-09-30	2025-11-12	10-K	25-000081
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$139.0M	2023-09-30	2025-11-12	10-K	25-000081
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$948.0M	2022-09-30	2024-11-07	10-K	24-000083
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$119.0M	2022-09-30	2024-11-07	10-K	24-000083
36	current assets	us-gaap:AssetsCurrent	$10.0B	2024-09-30	2025-11-12	10-K	25-000081
37	current liabilities	us-gaap:LiabilitiesCurrent	$6.3B	2024-09-30	2025-11-12	10-K	25-000081
38	assets	us-gaap:Assets	$20.0B	2023-09-30	2025-11-12	10-K	25-000081
39	assets	us-gaap:Assets	$18.1B	2022-09-30	2023-11-09	10-K	23-000081
40	shares outstanding	dei:EntityCommonStockSharesOutstanding	56,318,584	2025-10-31	2025-11-12	10-K	25-000081
41	shares outstanding	dei:EntityCommonStockSharesOutstanding	56,230,448	2024-10-31	2024-11-07	10-K	24-000083

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