Perrigo Co. plc

PRGO

NYSE; healthcare; SIC 2834, Pharmaceutical Preparations; CIK 0001585364

C

middle fifth of 370 graded peers in healthcare

rank 198 of 370; percentile 53.4; sampling error 2.5 points; lower is stronger

A B C D E

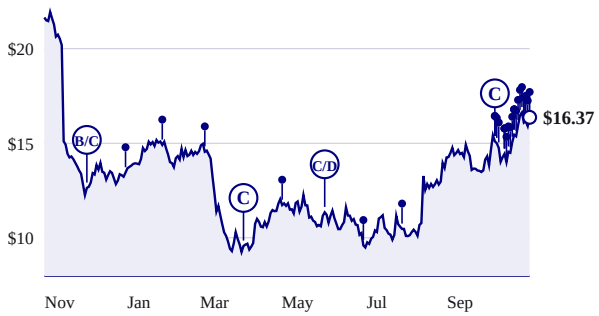
C, the tortoise



Scoreboard

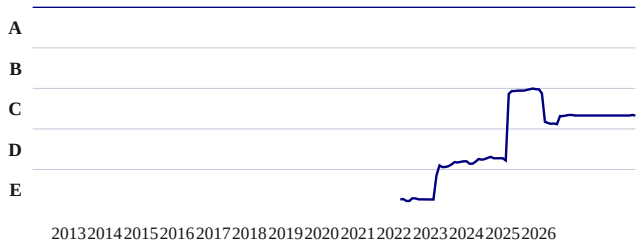
Profitability	B percentile 35.8
Solvency	C percentile 48.4
Growth and financing	D percentile 63.0
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $8.5B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: short runway, distress
Inputs computable	9 of 14
Graded from	filings received through Feb 26, 2026 239 days before the rescan; latest periodic filing 10-Q received Aug 5, 2026
Last close	$16.37 2026-10-22; market equity $2.3B; 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 26, 2026

. For results by segment and geographic locations see below Segment Results and Item 8. Note 2 and Note 21. During the first quarter of 2026, we have begun transitioning from a geographic segment reporting structure to a category-based segment view, enabling us to better align our financial disclosures and operational analysis with our product offerings and strategic priorities. The change is being made to stay in alignment with the way our chief operating decision maker intends to make future operating decisions, allocate resources and manage the growth and profitability of the Company.

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 35.8						
Gross profitability	17.5%	32.3%		67.0	371	2025-12-31
Return on invested capital	not computable	9.3%				

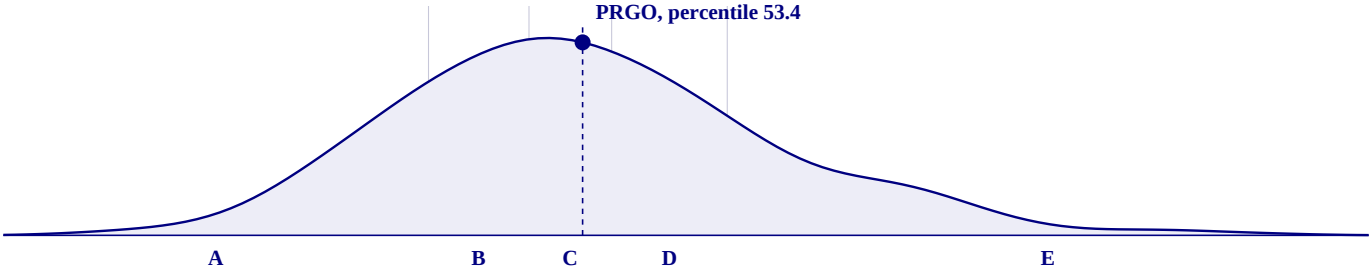
a prior annual debt, equity, and cash observation is required

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Accruals ratio	(18.3%)	(6.6%)	23.8	812	2025-12-31
Gross margin stability, five years	1.2 pts	2.8 pts	16.6	242	2025-12-31
Solvency, sleeve percentile 48.4					
Twelve-month failure probability	not computable	0.06%			
latest liabilities, cash plus short-term investments, book equity, and shares are required					
Altman Z double-prime	(0.37)	(0.30)	38.2	757	2025-12-31
Net debt to EBITDA	not computable	1.82x			
latest aligned inputs end 2015-06-27; latest annual assets end 2025-12-31					
Interest coverage	not computable	(4.51x)			
one or more required annual facts are missing					
Current ratio	2.76x	2.96x	58.6	840	2025-12-31
Growth and financing, sleeve percentile 63.0					
Revenue growth, three-year compound	(1.5%)	10.1%	74.8	414	2025-12-31
Free cash flow growth, three-year compound	(11.7%)	10.9%	87.4	96	2025-12-31
Reinvestment rate	not computable	37.1%			
pretax income must exceed the validity floor and imply a 0%-100% tax rate					
Asset growth, three years	(8.2%)	2.1%	65.8	705	2025-12-31
Net share issuance, one year	0.9%	2.4%	23.9	633	2026-02-24

Among 370 peers

healthcare; 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
193	Haemonetics Corp. (HAE)	52.0	C	
194	Zai Lab Ltd. (ZLAB)	52.3	C	
195	Aveanna Healthcare Holdings, Inc. (AVAH)	52.6	C	
196	Nexgel, Inc. (NXGL)	53.0	C	late filer
197	Nexgel, Inc. (NXGLW)	53.0	C	late filer
198	Perrigo Co. plc (PRGO)	53.4	C	
199	Sotera Health Co. (SHC)	53.7	C	
200	Universal Health Services Inc. (UHS)	53.9	C	
201	Emergent BioSolutions Inc. (EBS)	54.2	C	
202	Roivant Sciences Ltd. (ROIV)	54.5	C	fortress balance sheet
203	Teladoc Health, Inc. (TDOC)	54.7	C	fortress balance sheet

What the price implies

at the 2026-10-22 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(30.7%)	8.0%	24
Distance from 52-week high	(25.4%)	(29.6%)	55
EBIT to enterprise value	(42.2%)	(1.5%)	16
Free cash flow yield	6.4%	(0.9%)	87
Book value to price	1.11	0.27	87

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Sales to price	1.87	0.30	90
Composite equity issuance, five years	(14.3%)	20.5%	11
Relative strength against the sector, log excess return	(0.58)	(0.13)	24

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 4 of 9, period end 2025-12-31	
Return on assets above zero	fail
Operating cash flow above zero	pass
Return on assets improved	fail
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	n/a
Operating cash flow, four quarters	n/a
Months of runway	not finite
Days since last periodic filing	79 (10-Q received Aug 5, 2026)
Median daily dollar volume, 63 sessions	$32.4M

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	$1.5B	2025-12-31	2026-02-26	10-K	26-000009
2	assets	us-gaap:Assets	$8.5B	2025-12-31	2026-02-26	10-K	26-000009
3	operating income	us-gaap:OperatingIncomeLoss	$672.5M	2015-06-27	2017-05-22	10-K	17-000071
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$260.3M	2015-06-27	2017-05-22	10-K	17-000071
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$124.2M	2015-06-27	2017-05-22	10-K	17-000071
6	total debt	us-gaap:LongTermDebt	$820.9M	2015-06-27	2015-08-13	10-K	15-000100
7	book equity	us-gaap:StockholdersEquity	$10.7B	2015-06-27	2018-03-01	10-K	18-000015
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$785.6M	2015-06-27	2018-03-01	10-K	18-000015
9	net income	us-gaap:NetIncomeLoss	-$1.4B	2025-12-31	2026-02-26	10-K	26-000009
10	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$238.5M	2025-12-31	2026-02-26	10-K	26-000009
11	assets	us-gaap:Assets	$9.6B	2024-12-31	2026-02-26	10-K	26-000009
12	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.3B	2025-12-31	2026-02-26	10-K	26-000009
13	gross profit	us-gaap:GrossProfit	$1.5B	2024-12-31	2026-02-26	10-K	26-000009
14	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.4B	2024-12-31	2026-02-26	10-K	26-000009
15	gross profit	us-gaap:GrossProfit	$1.7B	2023-12-31	2026-02-26	10-K	26-000009
16	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.7B	2023-12-31	2026-02-26	10-K	26-000009
17	gross profit	us-gaap:GrossProfit	$1.5B	2022-12-31	2025-02-28	10-K	25-000014
18	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.5B	2022-12-31	2025-02-28	10-K	25-000014
19	gross profit	us-gaap:GrossProfit	$1.4B	2021-12-31	2024-02-27	10-K	24-000009
20	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.1B	2021-12-31	2024-02-27	10-K	24-000009
21	current assets	us-gaap:AssetsCurrent	$2.8B	2025-12-31	2026-02-26	10-K	26-000009
22	current liabilities	us-gaap:LiabilitiesCurrent	$1.0B	2025-12-31	2026-02-26	10-K	26-000009
23	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$3.7B	2025-12-31	2026-02-26	10-K	26-000009
24	operating income	us-gaap:OperatingIncomeLoss	-$1.1B	2025-12-31	2026-02-26	10-K	26-000009
25	book equity	us-gaap:StockholdersEquity	$2.9B	2025-12-31	2026-02-26	10-K	26-000009
26	liabilities	us-gaap:Liabilities	$5.6B	2025-12-31	2026-02-26	10-K	26-000009
27	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$258.7M	2015-06-27	2017-05-22	10-K	17-000071

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28	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$93.4M	2025-12-31	2026-02-26	10-K	26-000009
29	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$362.9M	2024-12-31	2026-02-26	10-K	26-000009
30	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$118.3M	2024-12-31	2026-02-26	10-K	26-000009
31	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$405.5M	2023-12-31	2026-02-26	10-K	26-000009
32	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$101.7M	2023-12-31	2026-02-26	10-K	26-000009
33	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$307.3M	2022-12-31	2025-02-28	10-K	25-000014
34	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$96.4M	2022-12-31	2025-02-28	10-K	25-000014
35	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$337.5M	2025-12-31	2026-02-26	10-K	26-000009
36	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$1.3B	2025-12-31	2026-02-26	10-K	26-000009
37	income tax	us-gaap:IncomeTaxExpenseBenefit	$104.4M	2025-12-31	2026-02-26	10-K	26-000009
38	current assets	us-gaap:AssetsCurrent	$2.5B	2024-12-31	2026-02-26	10-K	26-000009
39	current liabilities	us-gaap:LiabilitiesCurrent	$1.0B	2024-12-31	2026-02-26	10-K	26-000009
40	assets	us-gaap:Assets	$10.8B	2023-12-31	2026-02-26	10-K	26-000009
41	assets	us-gaap:Assets	$11.0B	2022-12-31	2025-02-28	10-K	25-000014
42	shares outstanding	dei:EntityCommonStockSharesOutstanding	137,649,352	2026-02-24	2026-02-26	10-K	26-000009
43	shares outstanding	dei:EntityCommonStockSharesOutstanding	136,458,620	2025-02-21	2025-02-28	10-K	25-000014

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