Element Solutions Inc.

ESI

NYSE; chemicals; SIC 2890, Miscellaneous Chemical Products; CIK 0001590714

C

middle fifth of 331 graded peers in the pooled industrial group

rank 165 of 331; percentile 53.0; sampling error 2.7 points; lower is stronger

A B C D E

C, the tortoise



Scoreboard

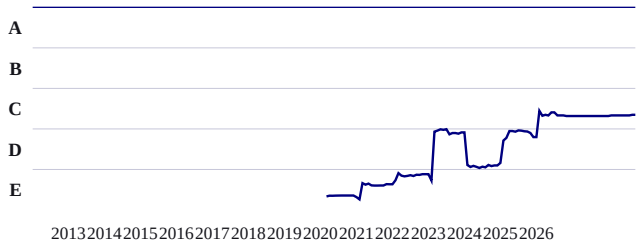
Profitability	C	percentile 53.9
Solvency	B/C	percentile 42.2
Growth and financing	C	percentile 56.4
Reliability	0.94 AUC	filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year	Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets	total assets $5.1B
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 Feb 18, 2026	248 days before the rescan; latest periodic filing 10-Q received Oct 22, 2026
Last close	$33.20	2026-10-23; market equity $8.1B; 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 18, 2026

Unless the context otherwise indicates or requires, all product names, trade names, trademarks, service marks or logos used in this 2025 Annual Report are part of our intellectual property, although the "®" and "TM" trademark designations may have been omitted.

The fourteen inputs

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

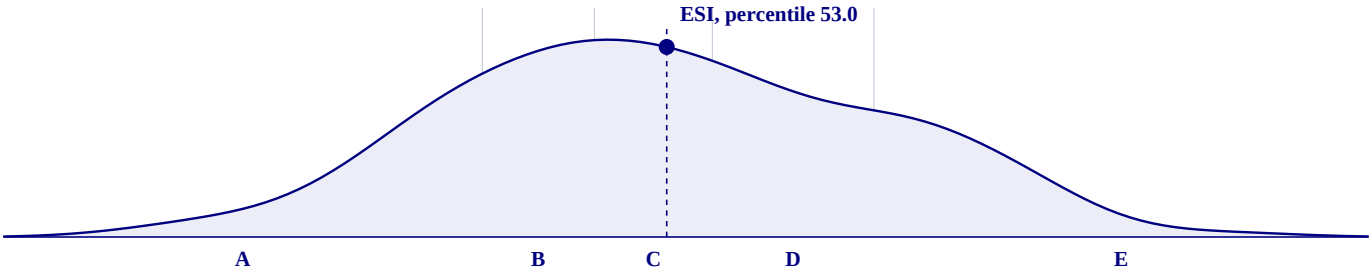
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 53.9						
Gross profitability	21.0%	21.3%		48.6	359	2025-12-31
Return on invested capital	6.6%	9.5%		62.6	124	2025-12-31
Accruals ratio	(2.0%)	(4.1%)		69.3	399	2025-12-31
Gross margin stability, five years	1.8 pts	2.2 pts		35.0	301	2025-12-31
Solvency, sleeve percentile 42.2						
Twelve-month failure probability	not computable	0.04%				

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latest liabilities, cash plus short-term investments, book equity, and shares are required						
Altman Z double-prime	2.52	3.41		51.8	300	2025-12-31
Net debt to EBITDA	2.03x	1.88x		56.4	150	2025-12-31
Interest coverage	not computable	4.16x				
one or more required annual facts are missing						
Current ratio	3.68x	2.20x		18.5	422	2025-12-31
Growth and financing, sleeve percentile 56.4						
Revenue growth, three-year compound	0.02%	1.3%		55.9	350	2025-12-31
Free cash flow growth, three-year compound	(2.8%)	12.5%		75.4	180	2025-12-31
Reinvestment rate	70.4%	23.5%		25.4	170	2025-12-31
Asset growth, three years	1.3%	2.9%		59.7	368	2025-12-31
Net share issuance, one year	0.5%	0.0%		65.8	320	2026-02-12

Among 331 peers

chemicals; 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
160	Woodward, Inc. (WWD)	51.6	C	
161	Linde plc (LIN)	51.8	C	
162	Agco Corp. (AGCO)	52.0	C	
163	General Dynamics Corp. (GD)	52.4	C	
164	Gorman Rupp Co. (GRC)	52.8	C	
165	Element Solutions Inc. (ESI)	53.0	C	
166	Hayward Holdings, Inc. (HAYW)	53.1	C	
167	Edgewell Personal Care Co. (EPC)	53.3	C	
168	Eastern Co. (EML)	53.5	C	
169	Owens Corning (OC)	53.9	C	
170	HNI Corp. (HNI)	54.3	C	dilution

What the price implies

at the 2026-10-23 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	41.9%	13.8%	76
Distance from 52-week high	(32.3%)	(26.5%)	39
EBIT to enterprise value	3.5%	3.9%	44
Free cash flow yield	2.8%	3.3%	43
Book value to price	0.36	0.40	47
Sales to price	0.32	0.55	27
Composite equity issuance, five years	(9.1%)	(9.9%)	53
Relative strength against the sector, log excess return	0.18	(0.02)	73

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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	pass
No new shares issued	fail
Gross margin improved	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$224.9M
Operating cash flow, four quarters	$283.3M
Months of runway	not finite
Days since last periodic filing	2 (10-Q received Oct 22, 2026)
Median daily dollar volume, 63 sessions	$139.7M

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	$1.1B	2025-12-31	2026-02-18	10-K	26-000018
2	assets	us-gaap:Assets	$5.1B	2025-12-31	2026-02-18	10-K	26-000018
3	operating income	us-gaap:OperatingIncomeLoss	$342.2M	2025-12-31	2026-02-18	10-K	26-000018
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$265.6M	2025-12-31	2026-02-18	10-K	26-000018
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$74.6M	2025-12-31	2026-02-18	10-K	26-000018
6	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$1.6B	2025-12-31	2026-02-18	10-K	26-000018
7	book equity	us-gaap:StockholdersEquity	$2.7B	2025-12-31	2026-02-18	10-K	26-000018
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$626.5M	2025-12-31	2026-02-18	10-K	26-000018
9	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$1.8B	2024-12-31	2026-02-18	10-K	26-000018
10	book equity	us-gaap:StockholdersEquity	$2.4B	2024-12-31	2026-02-18	10-K	26-000018
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$359.4M	2024-12-31	2026-02-18	10-K	26-000018
12	net income	us-gaap:NetIncomeLoss	$190.8M	2025-12-31	2026-02-18	10-K	26-000018
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesC...	$289.8M	2025-12-31	2026-02-18	10-K	26-000018
14	assets	us-gaap:Assets	$4.9B	2024-12-31	2026-02-18	10-K	26-000018
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$2.6B	2025-12-31	2026-02-18	10-K	26-000018
16	gross profit	us-gaap:GrossProfit	$1.0B	2024-12-31	2026-02-18	10-K	26-000018
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$2.5B	2024-12-31	2026-02-18	10-K	26-000018
18	gross profit	us-gaap:GrossProfit	$918.5M	2023-12-31	2026-02-18	10-K	26-000018
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$2.3B	2023-12-31	2026-02-18	10-K	26-000018
20	gross profit	us-gaap:GrossProfit	$952.7M	2022-12-31	2025-02-19	10-K	25-000022
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$2.5B	2022-12-31	2025-02-19	10-K	25-000022
22	gross profit	us-gaap:GrossProfit	$960.8M	2021-12-31	2024-02-21	10-K	24-000054
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$2.4B	2021-12-31	2024-02-21	10-K	24-000054
24	current assets	us-gaap:AssetsCurrent	$1.6B	2025-12-31	2026-02-18	10-K	26-000018
25	current liabilities	us-gaap:LiabilitiesCurrent	$429.9M	2025-12-31	2026-02-18	10-K	26-000018
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$904.6M	2025-12-31	2026-02-18	10-K	26-000018
27	liabilities	us-gaap:Liabilities	$2.4B	2025-12-31	2026-02-18	10-K	26-000018
28	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$151.2M	2025-12-31	2026-02-18	10-K	26-000018
29	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$62.2M	2025-12-31	2026-02-18	10-K	26-000018
30	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesC...	$362.0M	2024-12-31	2026-02-18	10-K	26-000018
31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$68.4M	2024-12-31	2026-02-18	10-K	26-000018

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32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesC...	$333.6M	2023-12-31	2026-02-18	10-K	26-000018
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$52.7M	2023-12-31	2026-02-18	10-K	26-000018
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$295.9M	2022-12-31	2023-02-22	10-K	23-000027
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$47.8M	2022-12-31	2025-02-19	10-K	25-000022
36	current assets	us-gaap:AssetsCurrent	$1.3B	2024-12-31	2026-02-18	10-K	26-000018
37	current liabilities	us-gaap:LiabilitiesCurrent	$379.7M	2024-12-31	2026-02-18	10-K	26-000018
38	assets	us-gaap:Assets	$5.0B	2023-12-31	2025-02-19	10-K	25-000022
39	assets	us-gaap:Assets	$4.9B	2022-12-31	2024-02-21	10-K	24-000054
40	shares outstanding	dei:EntityCommonStockSharesOutstanding	243,578,414	2026-02-12	2026-02-18	10-K	26-000018
41	shares outstanding	dei:EntityCommonStockSharesOutstanding	242,452,327	2025-02-14	2025-02-19	10-K	25-000022

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