# Garrett Motion Inc.

**GTX**

Nasdaq; consumer durables; SIC 3714, Motor Vehicle Parts & Accessories; CIK 0001735707

# D

**fourth fifth of 457 graded peers in the pooled consumer group**

rank 302 of 457; percentile 66.0; sampling error 2.3 points; lower is stronger

A B C D E

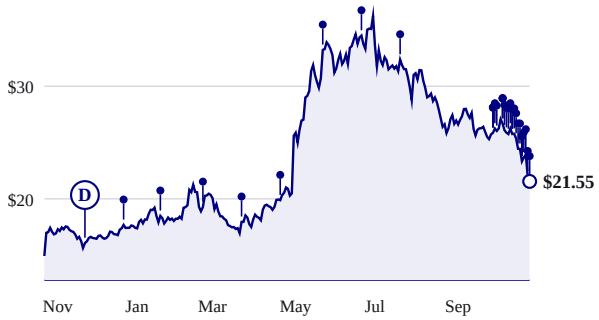
**D, the sloth**



## Scoreboard

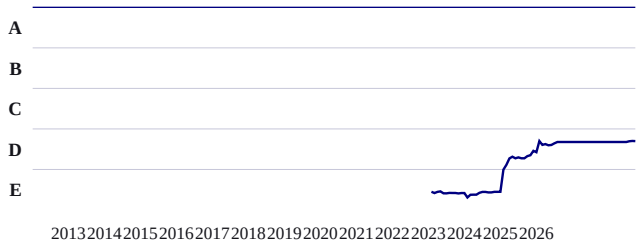
| | |
|---|---|
| **Profitability** | B/C<br>percentile 40.8 |
| **Solvency** | D/E<br>percentile 78.5 |
| **Growth and financing** | C<br>percentile 46.8 |
| **Reliability** | 0.91 AUC<br>filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025 |
| **Peer failure rate** | 1.01% a year<br>Item 1.03 bankruptcies, same asset band, 2012 to 2025 |
| **Size band** | $591M to $2.67B assets<br>total assets $2.4B |
| **Standard universe** | inside<br>revenue above $1M and assets above $10M |
| **Warnings** | none triggered<br>not computable: distress |
| **Inputs computable** | 8 of 14 |
| **Graded from** | filings received through Feb 19, 2026<br>247 days before the rescan; latest periodic filing 10-Q received Jul 29, 2026 |
| **Last close** | $21.55<br>2026-10-23; market equity $4.0B; 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 19, 2026*

Garrett is a cutting-edge technology leader delivering differentiated solutions for emission reduction and energy efficiency. We design, manufacture and sell highly engineered turbocharging, air and fluid compression, and high-speed electric motor technologies for original equipment manufacturers ("OEMs") and independent aftermarket distributors in the mobility and industrial fields. We have significant expertise in delivering highly engineered products at scale for internal combustion engines ("ICE") using gasoline, diesel, natural gas and hydrogen, as well as zero-emission vehicles ("ZEV").

## 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 40.8** | | | | | | |
| Gross profitability | 30.9% | 34.4% | | 52.9 | 470 | 2025-12-31 |
| Return on invested capital | not computable | 8.9% | | | | |

*one or more required annual facts are missing*

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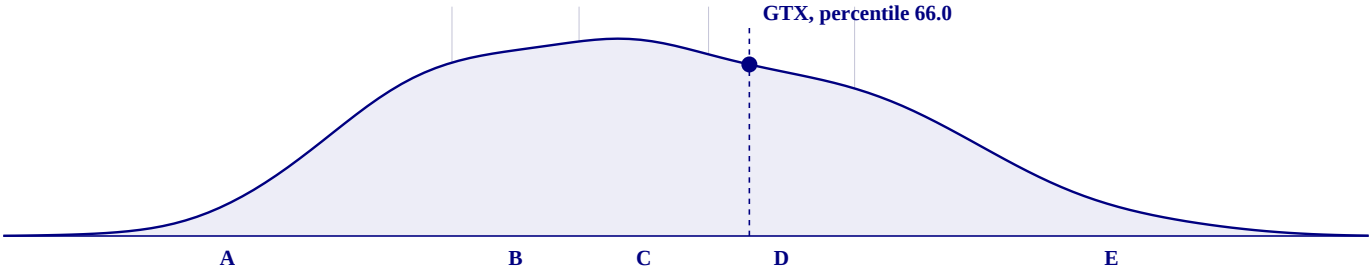
| | | | | | |
|---|---|---|---|---|---|
| Accruals ratio | (4.4%) | (5.1%) | 59.5 | 519 | 2025-12-31 |
| Gross margin stability, five years | 0.5 pts | 1.7 pts | 10.1 | 405 | 2025-12-31 |
| **Solvency, sleeve percentile 78.5** | | | | | |
| Twelve-month failure probability | not computable | 0.04% | | | |
| *latest liabilities, cash plus short-term investments, book equity, and shares are required* | | | | | |
| Altman Z double-prime | not computable | 2.13 | | | |
| *one or more required annual facts are missing* | | | | | |
| Net debt to EBITDA | not computable | 2.08x | | | |
| *one or more required annual facts are missing* | | | | | |
| Interest coverage | not computable | 2.70x | | | |
| *one or more required annual facts are missing* | | | | | |
| Current ratio | 0.97x | 1.55x | 78.5 | 536 | 2025-12-31 |
| **Growth and financing, sleeve percentile 46.8** | | | | | |
| Revenue growth, three-year compound | (0.2%) | 1.5% | 56.3 | 479 | 2025-12-31 |
| Free cash flow growth, three-year compound | 6.3% | 8.2% | 52.6 | 250 | 2025-12-31 |
| Reinvestment rate | not computable | 12.2% | | | |
| *one or more required annual facts are missing* | | | | | |
| Asset growth, three years | (3.5%) | 2.0% | 71.0 | 484 | 2025-12-31 |
| Net share issuance, one year | (7.3%) | (0.3%) | 7.4 | 378 | 2026-02-13 |

## Among 457 peers

*consumer durables; 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 |
|---|---|---|---|---|
| 297 | NU Skin Enterprises, Inc. (NUS) | 65.0 | D | distress, fortress balance sheet |
| 298 | Peloton Interactive, Inc. (PTON) | 65.0 | D | |
| 299 | O Reilly Automotive Inc. (ORLY) | 65.4 | D | |
| 300 | A.K.A. Brands Holding Corp. (AKA) | 65.7 | D | |
| 301 | Constellation Brands, Inc. (STZ) | 65.9 | D | |
| 302 | Garrett Motion Inc. (GTX) | 66.0 | D | |
| 303 | Duluth Holdings Inc. (DLTH) | 66.1 | D | |
| 304 | AerSale Corp. (ASLE) | 66.5 | D | short runway, fortress balance sheet |
| 305 | World Kinect Corp. (WKC) | 66.9 | D | |
| 306 | Willamette Valley Vineyards Inc. (WVVI) | 67.1 | D | |
| 307 | Willamette Valley Vineyards Inc. (WVVIP) | 67.1 | D | |

## 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 | 99.5% | (0.1%) | 97 |
| Distance from 52-week high | (40.5%) | (24.6%) | 25 |
| EBIT to enterprise value | not computable | 4.9% | |
| Free cash flow yield | 8.5% | 4.4% | 72 |

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| | | | |
|---|---|---|---|
| Book value to price | (0.19) | 0.43 | 7 |
| Sales to price | 0.89 | 1.46 | 34 |
| Composite equity issuance, five years | not computable | (16.0%) | |
| Relative strength against the sector, log excess return | 0.71 | (0.01) | 97 |

## Diagnostics

*shown on every report; none enters the grade*

| Measure | Value |
|---|---|
| **Piotroski F-score 9 of 9, period end 2025-12-31** | |
| 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 | pass |
| Current ratio improved | pass |
| No new shares issued | pass |
| Gross margin improved | pass |
| Asset turnover improved | pass |
| **Cash, filings, liquidity** | |
| Cash and equivalents | $142.0M |
| Operating cash flow, four quarters | $455.0M |
| Months of runway | not finite |
| Days since last periodic filing | 87 (10-Q received Jul 29, 2026) |
| Median daily dollar volume, 63 sessions | $75.0M |

## 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 | gross profit | us-gaap:GrossProfit | $731.0M | 2025-12-31 | 2026-02-19 | 10-K | 26-000009 |
| 2 | assets | us-gaap:Assets | $2.4B | 2025-12-31 | 2026-02-19 | 10-K | 26-000009 |
| 3 | net income | us-gaap:NetIncomeLoss | $310.0M | 2025-12-31 | 2026-02-19 | 10-K | 26-000009 |
| 4 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $413.0M | 2025-12-31 | 2026-02-19 | 10-K | 26-000009 |
| 5 | assets | us-gaap:Assets | $2.3B | 2024-12-31 | 2026-02-19 | 10-K | 26-000009 |
| 6 | revenue | us-gaap:Revenues | $3.6B | 2025-12-31 | 2026-02-19 | 10-K | 26-000009 |
| 7 | gross profit | us-gaap:GrossProfit | $705.0M | 2024-12-31 | 2026-02-19 | 10-K | 26-000009 |
| 8 | revenue | us-gaap:Revenues | $3.5B | 2024-12-31 | 2026-02-19 | 10-K | 26-000009 |
| 9 | gross profit | us-gaap:GrossProfit | $756.0M | 2023-12-31 | 2026-02-19 | 10-K | 26-000009 |
| 10 | revenue | us-gaap:Revenues | $3.9B | 2023-12-31 | 2026-02-19 | 10-K | 26-000009 |
| 11 | gross profit | us-gaap:GrossProfit | $683.0M | 2022-12-31 | 2025-02-20 | 10-K | 25-000013 |
| 12 | revenue | us-gaap:Revenues | $3.6B | 2022-12-31 | 2025-02-20 | 10-K | 25-000013 |
| 13 | gross profit | us-gaap:GrossProfit | $707.0M | 2021-12-31 | 2024-02-15 | 10-K | 24-000012 |
| 14 | revenue | us-gaap:Revenues | $3.6B | 2021-12-31 | 2024-02-15 | 10-K | 24-000012 |
| 15 | current assets | us-gaap:AssetsCurrent | $1.3B | 2025-12-31 | 2026-02-19 | 10-K | 26-000009 |
| 16 | current liabilities | us-gaap:LiabilitiesCurrent | $1.4B | 2025-12-31 | 2026-02-19 | 10-K | 26-000009 |
| 17 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $72.0M | 2025-12-31 | 2026-02-19 | 10-K | 26-000009 |
| 18 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $408.0M | 2024-12-31 | 2026-02-19 | 10-K | 26-000009 |
| 19 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $91.0M | 2024-12-31 | 2026-02-19 | 10-K | 26-000009 |
| 20 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $465.0M | 2023-12-31 | 2026-02-19 | 10-K | 26-000009 |
| 21 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $83.0M | 2023-12-31 | 2026-02-19 | 10-K | 26-000009 |
| 22 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $375.0M | 2022-12-31 | 2025-02-20 | 10-K | 25-000013 |
| 23 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $91.0M | 2022-12-31 | 2025-02-20 | 10-K | 25-000013 |
| 24 | assets | us-gaap:Assets | $2.5B | 2023-12-31 | 2025-02-20 | 10-K | 25-000013 |
| 25 | assets | us-gaap:Assets | $2.6B | 2022-12-31 | 2024-02-15 | 10-K | 24-000012 |
| 26 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 189,971,052 | 2026-02-13 | 2026-02-19 | 10-K | 26-000009 |

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| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| 27 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 205,009,801 | 2025-02-14 | 2025-02-20 | 10-K | 25-000013 |