Timken Co.

TKR

NYSE; manufacturing; SIC 3562, Ball & Roller Bearings; CIK 0000098362

C

middle fifth of 255 graded peers in manufacturing

rank 141 of 255; percentile 55.1; sampling error 3.0 points; lower is stronger

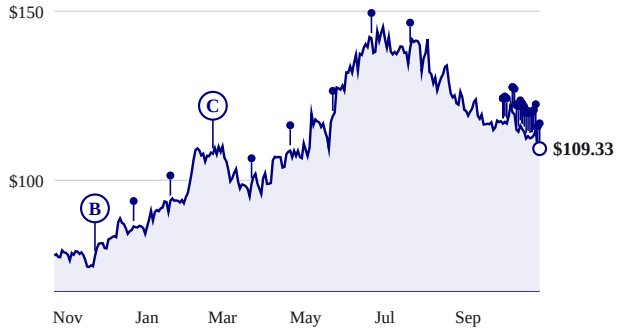
A B C D E

C, the tortoise



Scoreboard	
Profitability	C percentile 49.1
Solvency	C percentile 47.2
Growth and financing	C percentile 54.9
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 $6.7B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress
Inputs computable	11 of 14
Graded from	filings received through Feb 13, 2026 253 days before the rescan; latest periodic filing 10-Q received Aug 4, 2026
Last close	$109.30 2026-10-23; market equity $7.6B; 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 13, 2026

As used herein, the term "Timken" or the "Company" refers to The Timken Company and its subsidiaries unless the context otherwise dictates. Timken designs and manages a portfolio of engineered bearings and industrial motion products, and provides related services. The Company's growing portfolio features many strong brands, including Timken®, GGB®, Philadelphia Gear®, Cone Drive®, CGI®, Rollon®, Nadella®, Rosa Sistemi®, Diamond®, Drives®, Groeneveld®, BEKA®, Des-Case®, Lovejoy®, PT Tech®, Torsion Control Products® and Lagersmit®. The Company was founded in 1899 by Henry Timken, who received two patents on the design of a tapered roller bearing.

The fourteen inputs

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

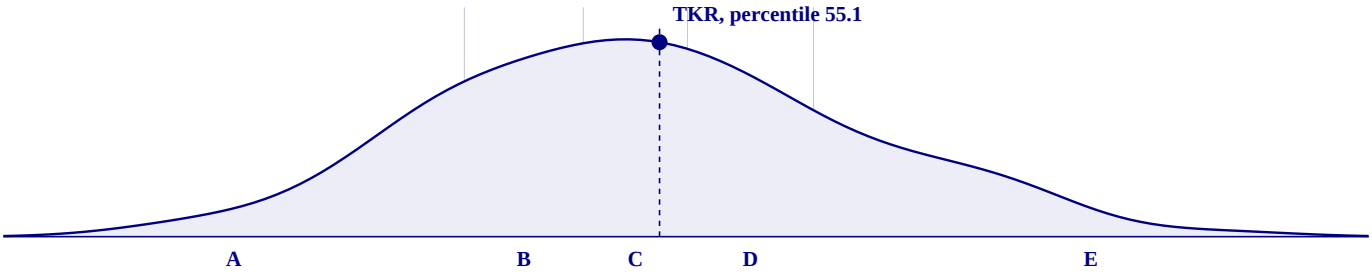
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 49.1						
Gross profitability	20.9%	21.9%		51.5	275	2025-12-31
Return on invested capital	8.9%	9.7%		54.5	100	2025-12-31

Not investment advice. Informational and educational only. Data from SEC EDGAR, may contain errors, is not warranted. The grade ranks reported financial condition and is not a return forecast.

Accruals ratio	(4.1%)	(3.5%)	47.4	307	2025-12-31
Gross margin stability, five years	1.9 pts	2.1 pts	43.0	229	2025-12-31
Solvency, sleeve percentile 47.2					
Twelve-month failure probability	not computable	0.04%			
liabilities and a nearby cover-page share count are required at 2026-06-30					
Altman Z double-prime	not computable	3.66			
one or more required annual facts are missing					
Net debt to EBITDA	1.99x	1.78x	59.2	121	2025-12-31
Interest coverage	not computable	5.09x			
latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31					
Current ratio	2.82x	2.25x	35.3	324	2025-12-31
Growth and financing, sleeve percentile 54.9					
Revenue growth, three-year compound	0.6%	2.2%	57.8	269	2025-12-31
Free cash flow growth, three-year compound	12.5%	13.7%	54.7	140	2025-12-31
Reinvestment rate	(24.2%)	26.1%	79.7	139	2025-12-31
Asset growth, three years	5.0%	4.3%	44.4	278	2025-12-31
Net share issuance, one year	(0.7%)	0.01%	37.8	242	2026-01-31

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
136	Hayward Holdings, Inc. (HAYW)	53.1	C	
137	Eastern Co. (EML)	53.5	C	
138	Owens Corning (OC)	53.9	C	
139	HNI Corp. (HNI)	54.3	C	dilution
140	Greenland Technologies Holding Corp. (GTEC)	54.7	C	dilution, fortress balance sheet
141	Timken Co. (TKR)	55.1	C	
142	Dover Corp. (DOV)	55.5	C	
143	nVent Electric plc (NVT)	55.9	C	
144	Trio-Tech International (TRT)	56.3	C	fortress balance sheet
145	Pentair plc (PNR)	56.7	C	
146	Northern Technologies International Corp. (NTIC)	57.1	C/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	62.4%	13.7%	82
Distance from 52-week high	(24.8%)	(26.9%)	56
EBIT to enterprise value	5.9%	4.3%	69
Free cash flow yield	5.4%	3.4%	73
Book value to price	0.42	0.36	55
Sales to price	0.60	0.54	54

Not investment advice. Informational and educational only. Data from SEC EDGAR, may contain errors, is not warranted. The grade ranks reported financial condition and is not a return forecast.

Composite equity issuance, five years	(18.3%)	(9.5%)	24
Relative strength against the sector, log excess return	0.35	(0.00)	82

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	fail
No new shares issued	pass
Gross margin improved	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$399.1M
Operating cash flow, four quarters	$530.8M
Months of runway	not finite
Days since last periodic filing	81 (10-Q received Aug 4, 2026)
Median daily dollar volume, 63 sessions	$102.9M

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	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.6B	2025-12-31	2026-02-13	10-K	26-000012
2	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$3.2B	2025-12-31	2026-02-13	10-K	26-000012
3	assets	us-gaap:Assets	$6.7B	2025-12-31	2026-02-13	10-K	26-000012
4	operating income	us-gaap:OperatingIncomeLoss	$540.6M	2025-12-31	2026-02-13	10-K	26-000012
5	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$416.0M	2025-12-31	2026-02-13	10-K	26-000012
6	income tax	us-gaap:IncomeTaxExpenseBenefit	$98.7M	2025-12-31	2026-02-13	10-K	26-000012
7	total debt	us-gaap:LongTermDebt	$1.9B	2025-12-31	2026-02-13	10-K	26-000012
8	book equity	us-gaap:StockholdersEquity	$3.2B	2025-12-31	2026-02-13	10-K	26-000012
9	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$364.4M	2025-12-31	2026-02-13	10-K	26-000012
10	total debt	us-gaap:LongTermDebt	$2.1B	2024-12-31	2026-02-13	10-K	26-000012
11	book equity	us-gaap:StockholdersEquity	$2.8B	2024-12-31	2026-02-13	10-K	26-000012
12	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$373.2M	2024-12-31	2026-02-13	10-K	26-000012
13	net income	us-gaap:NetIncomeLoss	$288.4M	2025-12-31	2026-02-13	10-K	26-000012
14	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$554.3M	2025-12-31	2026-02-13	10-K	26-000012
15	assets	us-gaap:Assets	$6.4B	2024-12-31	2026-02-13	10-K	26-000012
16	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.6B	2024-12-31	2026-02-13	10-K	26-000012
17	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$3.1B	2024-12-31	2026-02-13	10-K	26-000012
18	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.8B	2023-12-31	2026-02-13	10-K	26-000012
19	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$3.3B	2023-12-31	2026-02-13	10-K	26-000012
20	gross profit	us-gaap:GrossProfit	$1.3B	2022-12-31	2023-02-16	10-K	23-000040
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.5B	2022-12-31	2025-02-20	10-K	25-000055
22	gross profit	us-gaap:GrossProfit	$1.1B	2021-12-31	2023-02-16	10-K	23-000040
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.1B	2021-12-31	2024-02-26	10-K	24-000042
24	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$230.1M	2025-12-31	2026-02-13	10-K	26-000012
25	operating income	us-gaap:OperatingIncomeLoss	$657.1M	2023-12-31	2026-02-13	10-K	26-000012
26	interest expense	us-gaap:InterestExpense	$110.7M	2023-12-31	2024-02-26	10-K	24-000042
27	current assets	us-gaap:AssetsCurrent	$2.6B	2025-12-31	2026-02-13	10-K	26-000012
28	current liabilities	us-gaap:LiabilitiesCurrent	$922.1M	2025-12-31	2026-02-13	10-K	26-000012
29	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$148.2M	2025-12-31	2026-02-13	10-K	26-000012

Not investment advice. Informational and educational only. Data from SEC EDGAR, may contain errors, is not warranted. The grade ranks reported financial condition and is not a return forecast.

30	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$475.7M	2024-12-31	2026-02-13	10-K	26-000012
31	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$170.0M	2024-12-31	2026-02-13	10-K	26-000012
32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$545.2M	2023-12-31	2026-02-13	10-K	26-000012
33	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$187.8M	2023-12-31	2026-02-13	10-K	26-000012
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$463.8M	2022-12-31	2025-02-20	10-K	25-000055
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$178.4M	2022-12-31	2023-02-16	10-K	23-000040
36	current assets	us-gaap:AssetsCurrent	$2.5B	2024-12-31	2026-02-13	10-K	26-000012
37	current liabilities	us-gaap:LiabilitiesCurrent	$820.5M	2024-12-31	2026-02-13	10-K	26-000012
38	assets	us-gaap:Assets	$6.5B	2023-12-31	2025-02-20	10-K	25-000055
39	assets	us-gaap:Assets	$5.8B	2022-12-31	2024-02-26	10-K	24-000042
40	shares outstanding	dei:EntityCommonStockSharesOutstanding	69,544,299	2026-01-31	2026-02-13	10-K	26-000012
41	shares outstanding	dei:EntityCommonStockSharesOutstanding	70,001,123	2025-01-31	2025-02-20	10-K	25-000055

Not investment advice. Informational and educational only. Data from SEC EDGAR, may contain errors, is not warranted. The grade ranks reported financial condition and is not a return forecast.