# CRH Public Ltd. Co.

**CRH**

NYSE; manufacturing; SIC 3241, Cement, Hydraulic; CIK 0000849395

**B**

**second fifth of 255 graded peers in manufacturing**

rank 70 of 255; percentile 27.2; sampling error 3.0 points; lower is stronger

A B C D E

**B, the elk**



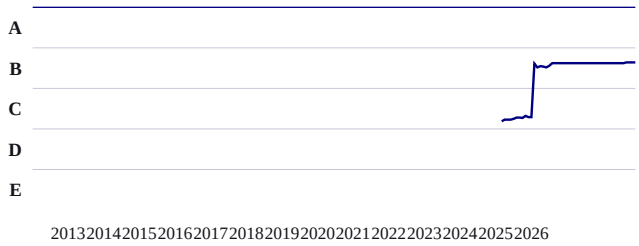
| Scoreboard | |
|---|---|
| **Profitability** | B/C<br>percentile 42.6 |
| **Solvency** | C<br>percentile 53.2 |
| **Growth and financing** | B<br>percentile 27.2 |
| **Reliability** | 0.94 AUC<br>filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025 |
| **Peer failure rate** | 0.52% a year<br>Item 1.03 bankruptcies, same asset band, 2012 to 2025 |
| **Size band** | over $2.67B assets<br>total assets $58.3B |
| **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 18, 2026<br>250 days before the rescan; latest periodic filing 10-Q received Jul 30, 2026 |
| **Last close** | $84.88<br>2026-10-23; market equity $56.5B; 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*

CRH is the leading provider of building materials critical to modernizing infrastructure. With our team of 83,032 people across 3,961 locations, our unmatched scale, connected portfolio, and deep local relationships make us the partner of choice for transportation, water and reindustrialization projects, shaping communities for a better tomorrow.

## 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 42.6** | | | | | | |
| Gross profitability | 23.2% | 21.9% | | 40.9 | 275 | 2025-12-31 |
| Return on invested capital | 12.3% | 9.7% | | 35.4 | 100 | 2025-12-31 |
| Accruals ratio | (3.4%) | (3.5%) | | 51.6 | 307 | 2025-12-31 |
| Gross margin stability, five years | not computable | 2.1 pts | | | | |
| *five annual gross margins are required; found 3* | | | | | | |

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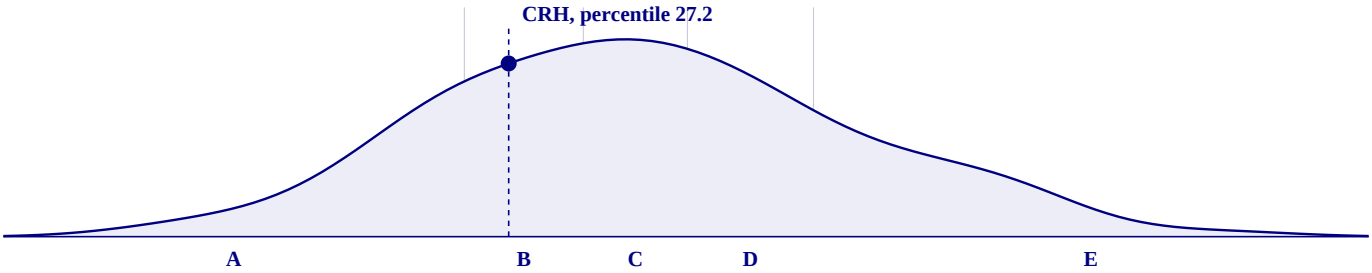
| | | | | | | |
|---|---|---|---|---|---|---|
| **Solvency, sleeve percentile 53.2** | | | | | | |
| Twelve-month failure probability | not computable | 0.04% | | | | |
| *latest liabilities, cash plus short-term investments, book equity, and shares are required* | | | | | | |
| Altman Z double-prime | 3.56 | 3.66 | 43.8 | 243 | 2025-12-31 | |
| Net debt to EBITDA | 1.77x | 1.78x | 50.8 | 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 | 1.74x | 2.25x | 65.0 | 324 | 2025-12-31 | |
| **Growth and financing, sleeve percentile 27.2** | | | | | | |
| Revenue growth, three-year compound | not computable | 2.2% | | | | |
| *four annual observations are required; found 3* | | | | | | |
| Free cash flow growth, three-year compound | not computable | 13.7% | | | | |
| *four consecutive annual FCF observations are required; found 3* | | | | | | |
| Reinvestment rate | 76.7% | 26.1% | 23.2 | 139 | 2025-12-31 | |
| Asset growth, three years | not computable | 4.3% | | | | |
| *four annual observations are required; found 3* | | | | | | |
| Net share issuance, one year | (1.2%) | 0.01% | 31.1 | 242 | 2026-02-04 | |

## 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 |
|---|---|---|---|---|
| 65 | Tennant Co. (TNC) | 25.2 | B | |
| 66 | ATI Inc. (ATI) | 25.6 | B | |
| 67 | Xylem Inc. (XYL) | 26.0 | B | |
| 68 | Zurn Elkay Water Solutions Corp. (ZWS) | 26.4 | B | |
| 69 | Carlisle Companies Inc. (CSL) | 26.8 | B | |
| 70 | CRH Public Ltd. Co. (CRH) | 27.2 | B | |
| 71 | Janus International Group, Inc. (JBI) | 27.6 | B | |
| 72 | Mueller Industries Inc. (MLI) | 28.0 | B | fortress balance sheet |
| 73 | Cricut, Inc. (CRCT) | 28.3 | B | |
| 74 | Twin Disc Inc. (TWIN) | 28.7 | B | |
| 75 | Flowserve Corp. (FLS) | 29.1 | B | |

## 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 | (20.5%) | 13.7% | 16 |
| Distance from 52-week high | (35.4%) | (26.9%) | 35 |
| EBIT to enterprise value | 7.6% | 4.3% | 84 |
| Free cash flow yield | 5.2% | 3.4% | 70 |
| Book value to price | 0.43 | 0.36 | 56 |
| Sales to price | 0.66 | 0.54 | 56 |

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| | | | |
|---|---|---|---|
| Composite equity issuance, five years | not computable | (9.5%) | |
| Relative strength against the sector, log excess return | (0.36) | (0.00) | 16 |

## Diagnostics

*shown on every report; none enters the grade*

| Measure | Value |
|---|---|
| **Piotroski F-score 7 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 | fail |
| Current ratio improved | pass |
| No new shares issued | pass |
| Gross margin improved | pass |
| Asset turnover improved | fail |
| **Cash, filings, liquidity** | |
| Cash and equivalents | $3.0B |
| Operating cash flow, four quarters | $5.4B |
| Months of runway | not finite |
| Days since last periodic filing | 88 (10-Q received Jul 30, 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 | $13.5B | 2025-12-31 | 2026-02-18 | 10-K | 26-009043 |
| 2 | assets | us-gaap:Assets | $58.3B | 2025-12-31 | 2026-02-18 | 10-K | 26-009043 |
| 3 | operating income | us-gaap:OperatingIncomeLoss | $5.4B | 2025-12-31 | 2026-02-18 | 10-K | 26-009043 |
| 4 | pretax income | us-gaap:IncomeLossFromContinuingOperationsBeforeInc... | $4.8B | 2025-12-31 | 2026-02-18 | 10-K | 26-009043 |
| 5 | income tax | us-gaap:IncomeTaxExpenseBenefit | $1.0B | 2025-12-31 | 2026-02-18 | 10-K | 26-009043 |
| 6 | total debt | us-gaap:LongTermDebt | $17.5B | 2025-12-31 | 2026-02-18 | 10-K | 26-009043 |
| 7 | book equity | us-gaap:StockholdersEquity | $24.0B | 2025-12-31 | 2026-02-18 | 10-K | 26-009043 |
| 8 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $4.1B | 2025-12-31 | 2026-02-18 | 10-K | 26-009043 |
| 9 | total debt | us-gaap:LongTermDebt | $13.9B | 2024-12-31 | 2026-02-18 | 10-K | 26-009043 |
| 10 | book equity | us-gaap:StockholdersEquity | $21.6B | 2024-12-31 | 2026-02-18 | 10-K | 26-009043 |
| 11 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $3.7B | 2024-12-31 | 2026-02-18 | 10-K | 26-009043 |
| 12 | net income | us-gaap:NetIncomeLoss | $3.8B | 2025-12-31 | 2026-02-18 | 10-K | 26-009043 |
| 13 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $5.6B | 2025-12-31 | 2026-02-18 | 10-K | 26-009043 |
| 14 | assets | us-gaap:Assets | $50.6B | 2024-12-31 | 2026-02-18 | 10-K | 26-009043 |
| 15 | current assets | us-gaap:AssetsCurrent | $15.3B | 2025-12-31 | 2026-02-18 | 10-K | 26-009043 |
| 16 | current liabilities | us-gaap:LiabilitiesCurrent | $8.8B | 2025-12-31 | 2026-02-18 | 10-K | 26-009043 |
| 17 | retained earnings | us-gaap:RetainedEarningsAccumulatedDeficit | $25.6B | 2025-12-31 | 2026-02-18 | 10-K | 26-009043 |
| 18 | liabilities | us-gaap:Liabilities | $32.9B | 2025-12-31 | 2026-02-18 | 10-K | 26-009043 |
| 19 | depreciation amortization | us-gaap:DepreciationDepletionAndAmortization | $2.2B | 2025-12-31 | 2026-02-18 | 10-K | 26-009043 |
| 20 | operating income | us-gaap:OperatingIncomeLoss | $4.2B | 2023-12-31 | 2026-02-18 | 10-K | 26-009043 |
| 21 | interest expense | us-gaap:InterestExpense | $376.0M | 2023-12-31 | 2024-02-29 | 10-K | 24-007773 |
| 22 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $37.4B | 2025-12-31 | 2026-02-18 | 10-K | 26-009043 |
| 23 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $35.6B | 2024-12-31 | 2026-02-18 | 10-K | 26-009043 |
| 24 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $34.9B | 2023-12-31 | 2026-02-18 | 10-K | 26-009043 |
| 25 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $2.7B | 2025-12-31 | 2026-02-18 | 10-K | 26-009043 |
| 26 | current assets | us-gaap:AssetsCurrent | $14.1B | 2024-12-31 | 2026-02-18 | 10-K | 26-009043 |
| 27 | current liabilities | us-gaap:LiabilitiesCurrent | $10.3B | 2024-12-31 | 2026-02-18 | 10-K | 26-009043 |
| 28 | assets | us-gaap:Assets | $47.5B | 2023-12-31 | 2026-02-18 | 10-K | 26-009043 |
| 29 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 668,250,818 | 2026-02-04 | 2026-02-18 | 10-K | 26-009043 |

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| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| 30 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 676,475,037 | 2025-02-13 | 2025-02-26 | 10-K | 25-008179 | |