Imperial OIL Ltd.

IMO

NYSE; energy; SIC 2911, Petroleum Refining; CIK 0000049938

None

No letter

6 of 14 inputs computable; 7 are required, with a score in every sleeve

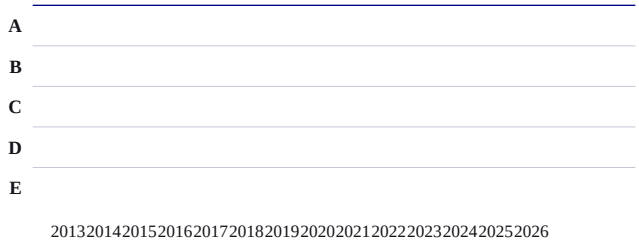
Scoreboard	
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $42.3B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	thin data not computable: distress
Inputs computable	6 of 14
Graded from	filings received through Feb 18, 2026 250 days before the rescan; latest periodic filing 10-Q received Aug 3, 2026
Last close	$134.79 2026-10-23; market equity $65.2B; 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

Imperial Oil Limited was incorporated under the laws of Canada in 1880 and was continued under the Canada Business Corporations Act (the "CBCA") by certificate of continuance dated April 24, 1978. The head and principal office of the company is located at 505 Quarry Park Boulevard S.E., Calgary, Alberta, Canada T2C 5N1. Exxon Mobil Corporation ("ExxonMobil") owns approximately 69.6 percent of the outstanding shares of the company. In this report, unless the context otherwise indicates, reference to the "company" or "Imperial" includes Imperial Oil Limited and its subsidiaries, and reference to ExxonMobil includes Exxon Mobil Corporation and its affiliates, as appropriate.

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 31.4						
Gross profitability	not computable	17.0%				
one or more required annual facts are missing						

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Return on invested capital	not computable	6.0%				
one or more required annual facts are missing						
Accruals ratio	(8.1%)	(5.0%)		31.4	272	2025-12-31
Gross margin stability, five years	not computable	4.6 pts				
five annual gross margins are required; found 0						
Solvency, sleeve percentile 31.6						
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	not computable	1.48				
one or more required annual facts are missing						
Net debt to EBITDA	not computable	3.63x				
one or more required annual facts are missing						
Interest coverage	not computable	2.37x				
one or more required annual facts are missing						
Current ratio	1.27x	0.94x		31.6	283	2025-12-31
Growth and financing, sleeve percentile 56.1						
Revenue growth, three-year compound	(7.6%)	0.7%		78.4	223	2025-12-31
Free cash flow growth, three-year compound	(19.3%)	(11.8%)		57.4	55	2025-12-31
Reinvestment rate	not computable	59.0%				
one or more required annual facts are missing						
Asset growth, three years	(0.9%)	6.3%		84.1	247	2025-12-31
Net share issuance, one year	(5.0%)	0.4%		4.5	157	2026-02-11

Warnings

1 of 7 checks triggered; none of them enters the letter

Check	Measured
Thin data	6 of 14 grade factors are computable; minimum is 7

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	45.9%	15.5%	80
Distance from 52-week high	(2.6%)	(13.2%)	85
EBIT to enterprise value	not computable	4.5%	
Free cash flow yield	7.2%	1.4%	78
Book value to price	0.38	0.52	24
Sales to price	0.72	0.44	70
Composite equity issuance, five years	(54.5%)	(7.2%)	4
Relative strength against the sector, log excess return	0.00	0.04	42

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score None 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

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Asset turnover improved	fail

Cash, filings, liquidity

Cash and equivalents	$2.8B
Operating cash flow, four quarters	$7.2B
Months of runway	not finite
Days since last periodic filing	84 (10-Q received Aug 3, 2026)
Median daily dollar volume, 63 sessions	$68.6M

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	net income	us-gaap:NetIncomeLoss	3,268,000,000	2025-12-31	2026-02-18	10-K	26-000009
2	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	6,708,000,000	2025-12-31	2026-02-18	10-K	26-000009
3	assets	us-gaap:Assets	42,309,000,000	2025-12-31	2026-02-18	10-K	26-000009
4	assets	us-gaap:Assets	42,938,000,000	2024-12-31	2026-02-18	10-K	26-000009
5	current assets	us-gaap:AssetsCurrent	8,417,000,000	2025-12-31	2026-02-18	10-K	26-000009
6	current liabilities	us-gaap:LiabilitiesCurrent	6,616,000,000	2025-12-31	2026-02-18	10-K	26-000009
7	revenue	us-gaap:Revenues	47,078,000,000	2025-12-31	2026-02-18	10-K	26-000009
8	revenue	us-gaap:Revenues	51,532,000,000	2024-12-31	2026-02-18	10-K	26-000009
9	revenue	us-gaap:Revenues	50,969,000,000	2023-12-31	2026-02-18	10-K	26-000009
10	revenue	us-gaap:Revenues	59,670,000,000	2022-12-31	2025-02-19	10-K	25-000015
11	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	2,005,000,000	2025-12-31	2026-02-18	10-K	26-000009
12	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	5,981,000,000	2024-12-31	2026-02-18	10-K	26-000009
13	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	1,867,000,000	2024-12-31	2026-02-18	10-K	26-000009
14	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	3,734,000,000	2023-12-31	2026-02-18	10-K	26-000009
15	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	1,785,000,000	2023-12-31	2026-02-18	10-K	26-000009
16	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	10,482,000,000	2022-12-31	2025-02-19	10-K	25-000015
17	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	1,526,000,000	2022-12-31	2025-02-19	10-K	25-000015
18	assets	us-gaap:Assets	41,199,000,000	2023-12-31	2026-02-18	10-K	26-000009
19	assets	us-gaap:Assets	43,524,000,000	2022-12-31	2025-02-19	10-K	25-000015
20	shares outstanding	dei:EntityCommonStockSharesOutstanding	483,592,715	2026-02-11	2026-02-18	10-K	26-000009
21	shares outstanding	dei:EntityCommonStockSharesOutstanding	509,044,963	2025-02-14	2025-02-19	10-K	25-000015

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