# Pentair plc

**PNR**

NYSE; manufacturing; SIC 3550, Special Industry Machinery (No Metalworking Machinery); CIK 0000077360

**C**

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

rank 145 of 255; percentile 56.7; sampling error 3.0 points; lower is stronger

A B C D E

**C, the tortoise**



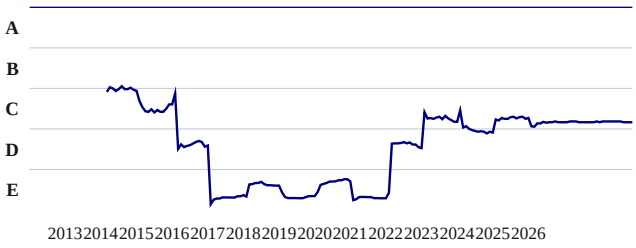
| Scoreboard | |
|---|---|
| **Profitability** | C<br>percentile 52.0 |
| **Solvency** | C<br>percentile 53.3 |
| **Growth and financing** | C<br>percentile 46.6 |
| **Reliability** | 0.94 AUC<br>filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025 |
| **Peer failure rate** | 0.52% a year<br>Item 1.03 bankruptcies, same asset band, 2012 to 2025 |
| **Size band** | over $2.67B assets<br>total assets $6.9B |
| **Standard universe** | inside<br>revenue above $1M and assets above $10M |
| **Warnings** | none triggered<br>not computable: distress |
| **Inputs computable** | 10 of 14 |
| **Graded from** | filings received through Feb 24, 2026<br>244 days before the rescan; latest periodic filing 10-Q received Jul 28, 2026 |
| **Last close** | $55.33<br>2026-10-23; market equity $8.9B; 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 24, 2026*

Unless the context otherwise indicates, references herein to "Pentair," the "Company," and such words as "we," "us," and "our" include Pentair plc and its consolidated subsidiaries. At Pentair, we help the world sustainably move, improve and enjoy water, life's most essential resource. From our residential and commercial water solutions to industrial water management and everything in between, Pentair is an S&P 500 company focused on smart, sustainable water solutions that help our planet and people thrive. Our vision is to be the world's most valued sustainable water solutions company for our employees, customers and shareholders.

## 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 52.0** | | | | | | |
| Gross profitability | 24.6% | 21.9% | | 35.8 | 275 | 2025-12-31 |
| Return on invested capital | not computable | 9.7% | | | | |

*latest aligned inputs end 2019-12-31; latest annual assets end 2025-12-31*

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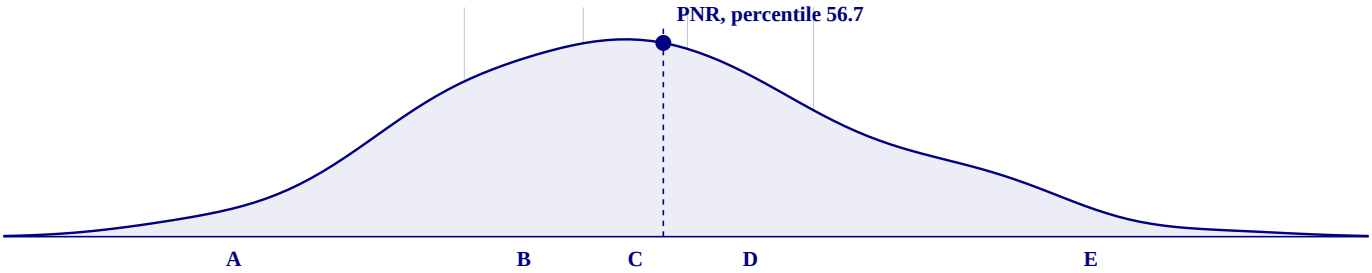
| | | | | | |
|---|---|---|---|---|---|
| Accruals ratio | (2.4%) | (3.5%) | 60.5 | 307 | 2025-12-31 |
| Gross margin stability, five years | 2.7 pts | 2.1 pts | 59.6 | 229 | 2025-12-31 |
| **Solvency, sleeve percentile 53.3** | | | | | |
| Twelve-month failure probability | not computable | 0.04% | | | |
| *latest liabilities, cash plus short-term investments, book equity, and shares are required* | | | | | |
| Altman Z double-prime | 4.09 | 3.66 | 37.2 | 243 | 2025-12-31 |
| Net debt to EBITDA | not computable | 1.78x | | | |
| *latest aligned inputs end 2019-12-31; latest annual assets end 2025-12-31* | | | | | |
| Interest coverage | not computable | 5.09x | | | |
| *latest aligned inputs end 2019-12-31; latest annual assets end 2025-12-31* | | | | | |
| Current ratio | 1.61x | 2.25x | 69.3 | 324 | 2025-12-31 |
| **Growth and financing, sleeve percentile 46.6** | | | | | |
| Revenue growth, three-year compound | 0.4% | 2.2% | 59.3 | 269 | 2025-12-31 |
| Free cash flow growth, three-year compound | 38.9% | 13.7% | 16.5 | 140 | 2025-12-31 |
| Reinvestment rate | 6.9% | 26.1% | 61.6 | 139 | 2025-12-31 |
| Asset growth, three years | 2.1% | 4.3% | 61.0 | 278 | 2025-12-31 |
| Net share issuance, one year | (1.0%) | 0.01% | 34.4 | 242 | 2025-12-31 |

## 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 |
|---|---|---|---|---|
| 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 | |
| 147 | RBC Bearings Inc. (RBC) | 57.5 | C/D | |
| 148 | Kaiser Aluminum Corp. (KALU) | 57.9 | C/D | fortress balance sheet |
| 149 | Steel Dynamics Inc. (STLD) | 58.3 | C/D | |
| 150 | Ingersoll Rand Inc. (IR) | 58.7 | 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 | (44.8%) | 13.7% | 6 |
| Distance from 52-week high | (50.0%) | (26.9%) | 21 |
| EBIT to enterprise value | 7.9% | 4.3% | 85 |
| Free cash flow yield | 8.3% | 3.4% | 86 |
| Book value to price | 0.43 | 0.36 | 56 |
| Sales to price | 0.47 | 0.54 | 43 |

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| | | | |
|---|---|---|---|
| Composite equity issuance, five years | (10.3%) | (9.5%) | 45 |
| Relative strength against the sector, log excess return | (0.73) | (0.00) | 6 |

## 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 | $67.7M |
| Operating cash flow, four quarters | $786.3M |
| Months of runway | not finite |
| Days since last periodic filing | 90 (10-Q received Jul 28, 2026) |
| Median daily dollar volume, 63 sessions | $155.2M |

## 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 | $1.7B | 2025-12-31 | 2026-02-24 | 10-K | 26-000007 |
| 2 | assets | us-gaap:Assets | $6.9B | 2025-12-31 | 2026-02-24 | 10-K | 26-000007 |
| 3 | operating income | us-gaap:OperatingIncomeLoss | $432.5M | 2019-12-31 | 2022-02-22 | 10-K | 22-000006 |
| 4 | pretax income | us-gaap:IncomeLossFromContinuingOperationsBeforeInc... | $407.5M | 2019-12-31 | 2022-02-22 | 10-K | 22-000006 |
| 5 | income tax | us-gaap:IncomeTaxExpenseBenefit | $45.8M | 2019-12-31 | 2022-02-22 | 10-K | 22-000006 |
| 6 | total debt | us-gaap:LongTermDebt | $1.0B | 2019-12-31 | 2021-02-16 | 10-K | 21-000005 |
| 7 | book equity | us-gaap:StockholdersEquityIncludingPortionAttributableT... | $2.0B | 2019-12-31 | 2023-02-21 | 10-K | 23-000006 |
| 8 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $82.5M | 2019-12-31 | 2020-02-25 | 10-K | 20-000006 |
| 9 | total debt | us-gaap:LongTermDebt | $787.6M | 2018-12-31 | 2020-02-25 | 10-K | 20-000006 |
| 10 | book equity | us-gaap:StockholdersEquityIncludingPortionAttributableT... | $1.8B | 2018-12-31 | 2022-02-22 | 10-K | 22-000006 |
| 11 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $74.3M | 2018-12-31 | 2020-02-25 | 10-K | 20-000006 |
| 12 | net income | us-gaap:NetIncomeLoss | $653.8M | 2025-12-31 | 2026-02-24 | 10-K | 26-000007 |
| 13 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $814.8M | 2025-12-31 | 2026-02-24 | 10-K | 26-000007 |
| 14 | assets | us-gaap:Assets | $6.4B | 2024-12-31 | 2026-02-24 | 10-K | 26-000007 |
| 15 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $4.2B | 2025-12-31 | 2026-02-24 | 10-K | 26-000007 |
| 16 | gross profit | us-gaap:GrossProfit | $1.6B | 2024-12-31 | 2026-02-24 | 10-K | 26-000007 |
| 17 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $4.1B | 2024-12-31 | 2026-02-24 | 10-K | 26-000007 |
| 18 | gross profit | us-gaap:GrossProfit | $1.5B | 2023-12-31 | 2026-02-24 | 10-K | 26-000007 |
| 19 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $4.1B | 2023-12-31 | 2026-02-24 | 10-K | 26-000007 |
| 20 | gross profit | us-gaap:GrossProfit | $1.4B | 2022-12-31 | 2025-02-25 | 10-K | 25-000006 |
| 21 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $4.1B | 2022-12-31 | 2025-02-25 | 10-K | 25-000006 |
| 22 | gross profit | us-gaap:GrossProfit | $1.3B | 2021-12-31 | 2024-02-20 | 10-K | 24-000007 |
| 23 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $3.8B | 2021-12-31 | 2024-02-20 | 10-K | 24-000007 |
| 24 | current assets | us-gaap:AssetsCurrent | $1.5B | 2025-12-31 | 2026-02-24 | 10-K | 26-000007 |
| 25 | current liabilities | us-gaap:LiabilitiesCurrent | $959.3M | 2025-12-31 | 2026-02-24 | 10-K | 26-000007 |
| 26 | retained earnings | us-gaap:RetainedEarningsAccumulatedDeficit | $2.8B | 2025-12-31 | 2026-02-24 | 10-K | 26-000007 |
| 27 | operating income | us-gaap:OperatingIncomeLoss | $857.5M | 2025-12-31 | 2026-02-24 | 10-K | 26-000007 |
| 28 | book equity | us-gaap:StockholdersEquityIncludingPortionAttributableT... | $3.9B | 2025-12-31 | 2026-02-24 | 10-K | 26-000007 |
| 29 | liabilities | us-gaap:Liabilities | $3.0B | 2025-12-31 | 2026-02-24 | 10-K | 26-000007 |

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| | | | | | | | |
|---|---|---|---|---|---|---|---|
| 30 | depreciation amortization | us-gaap:Depreciation | $48.3M | 2019-12-31 | 2022-02-22 | 10-K | 22-000006 |
| 31 | interest expense | us-gaap:InterestExpense | $30.1M | 2019-12-31 | 2020-02-25 | 10-K | 20-000006 |
| 32 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $68.8M | 2025-12-31 | 2026-02-24 | 10-K | 26-000007 |
| 33 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $766.7M | 2024-12-31 | 2026-02-24 | 10-K | 26-000007 |
| 34 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $74.4M | 2024-12-31 | 2026-02-24 | 10-K | 26-000007 |
| 35 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $619.2M | 2023-12-31 | 2026-02-24 | 10-K | 26-000007 |
| 36 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $76.0M | 2023-12-31 | 2026-02-24 | 10-K | 26-000007 |
| 37 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $363.3M | 2022-12-31 | 2025-02-25 | 10-K | 25-000006 |
| 38 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $85.2M | 2022-12-31 | 2025-02-25 | 10-K | 25-000006 |
| 39 | depreciation amortization | us-gaap:Depreciation | $59.6M | 2025-12-31 | 2026-02-24 | 10-K | 26-000007 |
| 40 | pretax income | us-gaap:IncomeLossFromContinuingOperationsBeforeInc... | $756.5M | 2025-12-31 | 2026-02-24 | 10-K | 26-000007 |
| 41 | income tax | us-gaap:IncomeTaxExpenseBenefit | $107.0M | 2025-12-31 | 2026-02-24 | 10-K | 26-000007 |
| 42 | current assets | us-gaap:AssetsCurrent | $1.4B | 2024-12-31 | 2026-02-24 | 10-K | 26-000007 |
| 43 | current liabilities | us-gaap:LiabilitiesCurrent | $895.1M | 2024-12-31 | 2026-02-24 | 10-K | 26-000007 |
| 44 | assets | us-gaap:Assets | $6.6B | 2023-12-31 | 2026-02-24 | 10-K | 26-000007 |
| 45 | assets | us-gaap:Assets | $6.4B | 2022-12-31 | 2025-02-25 | 10-K | 25-000006 |
| 46 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 163,235,706 | 2025-12-31 | 2026-02-24 | 10-K | 26-000007 |
| 47 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 164,817,183 | 2024-12-31 | 2025-02-25 | 10-K | 25-000006 |

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