# Estee Lauder Companies Inc. EL

NYSE; chemicals; SIC 2844, Perfumes, Cosmetics & Other Toilet Preparations; CIK 0001001250

**D**

**fourth fifth of 331 graded peers in the pooled industrial group**

rank 227 of 331; percentile 72.7; sampling error 2.7 points; lower is stronger

A B C D E

**D, the sloth**



## Scoreboard

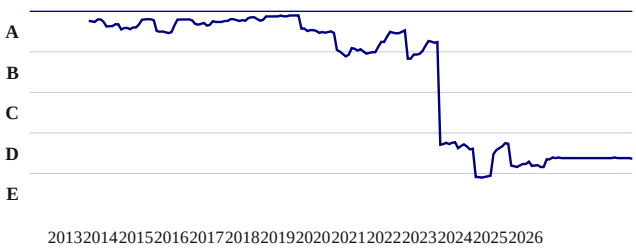
| | |
|---|---|
| **Profitability** | B<br>percentile 23.0 |
| **Solvency** | E<br>percentile 83.6 |
| **Growth and financing** | D<br>percentile 69.0 |
| **Reliability** | 0.94 AUC<br>filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025 |
| **Peer failure rate** | 0.52% a year<br>Item 1.03 bankruptcies, same asset band, 2012 to 2025 |
| **Size band** | over $2.67B assets<br>total assets $19.8B |
| **Standard universe** | inside<br>revenue above $1M and assets above $10M |
| **Warnings** | none triggered<br>not computable: dilution, short runway, distress |
| **Inputs computable** | 8 of 14 |
| **Graded from** | filings received through Aug 19, 2026<br>69 days before the rescan; latest periodic filing 10-K received Aug 19, 2026 |
| **Last close** | $108.85<br>2026-10-26; market equity $0; 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 Aug 19, 2026*

The Estée Lauder Companies Inc., founded in 1946 by Estée and Joseph Lauder, is one of the world's leading manufacturers, marketers and sellers of quality skin care, makeup, fragrance and hair care products. We are a steward of over 20 luxury and prestige brands globally. Since the initial launch of the Estée Lauder brand in the United States, we have significantly expanded our consumer reach to approximately 150 countries and territories.

## The fourteen inputs

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

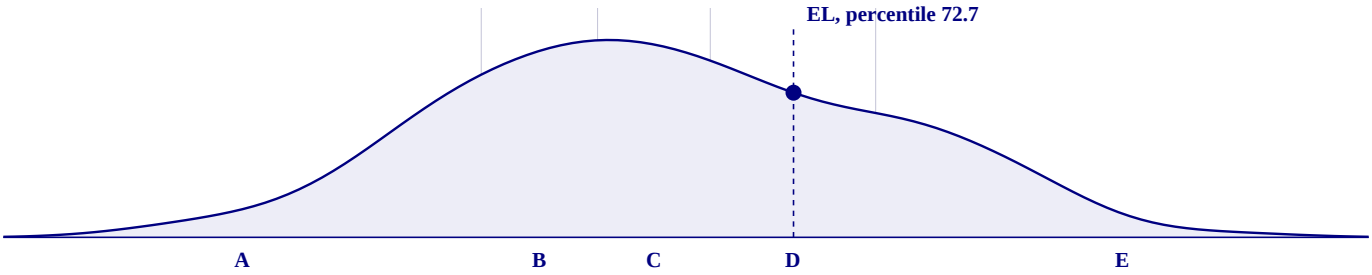
| Input | Value | Peer median | Percentile, 0 to 100 | Pct | Peers | Period end |
|---|---|---|---|---|---|---|
| **Profitability, sleeve percentile 23.0** | | | | | | |
| Gross profitability | 57.5% | 21.3% | | 3.3 | 360 | 2026-06-30 |
| Return on invested capital | not computable | 9.3% | | | | |
| *latest aligned inputs end 2018-06-30; latest annual assets end 2026-06-30* | | | | | | |
| Accruals ratio | (8.0%) | (4.2%) | | 28.1 | 399 | 2026-06-30 |

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| | | | | | |
|---|---|---|---|---|---|
| Gross margin stability, five years | 1.9 pts | 2.2 pts | 37.7 | 301 | 2026-06-30 |
| **Solvency, sleeve percentile 83.6** | | | | | |
| 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 | 3.41 | | | |
| *latest aligned inputs end 2019-06-30; latest annual assets end 2026-06-30* | | | | | |
| Net debt to EBITDA | not computable | 1.88x | | | |
| *latest aligned inputs end 2018-06-30; latest annual assets end 2026-06-30* | | | | | |
| Interest coverage | not computable | 4.16x | | | |
| *latest aligned inputs end 2024-06-30; latest annual assets end 2026-06-30* | | | | | |
| Current ratio | 1.22x | 2.20x | 83.6 | 422 | 2026-06-30 |
| **Growth and financing, sleeve percentile 69.0** | | | | | |
| Revenue growth, three-year compound | (1.8%) | 1.2% | 63.3 | 350 | 2026-06-30 |
| Free cash flow growth, three-year compound | 21.8% | 12.5% | 36.1 | 181 | 2026-06-30 |
| Reinvestment rate | (215.6%) | 21.8% | 96.4 | 170 | 2026-06-30 |
| Asset growth, three years | (5.5%) | 2.9% | 80.1 | 367 | 2026-06-30 |
| Net share issuance, one year | not computable | 0.0% | | | |
| *two annual share counts are required; found 0* | | | | | |

## Among 331 peers

*chemicals; 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 |
|---|---|---|---|---|
| 222 | JBT Marel Corp. (JBTM) | 71.3 | D | |
| 223 | Esab Corp. (ESAB) | 71.7 | D | |
| 224 | Carrier Global Corp. (CARR) | 72.0 | D | |
| 225 | Fuller H B Co. (FUL) | 72.1 | D | |
| 226 | Trimas Corp. (TRS) | 72.4 | D | |
| 227 | Estee Lauder Companies Inc. (EL) | 72.7 | D | |
| 228 | Loar Holdings Inc. (LOAR) | 72.8 | D | |
| 229 | Comstock Inc. (LODE) | 73.0 | D | dilution, fortress balance sheet |
| 230 | Columbus Mckinnon Corp. (CMCO) | 73.2 | D | |
| 231 | Nike, Inc. (NKE) | 73.6 | D | |
| 232 | FutureFuel Corp. (FF) | 73.9 | D | late filer |

## What the price implies

*at the 2026-10-26 close; none of these enters the grade*

| Measure | Value | Peer median | Percentile |
|---|---|---|---|
| Twelve-month price change, skipping the latest month | 17.3% | 13.8% | 53 |
| Distance from 52-week high | (9.0%) | (25.9%) | 85 |
| EBIT to enterprise value | not computable | 3.9% | |
| Free cash flow yield | not computable | 3.2% | |
| Book value to price | not computable | 0.39 | |

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| | | | |
|---|---|---|---|
| Sales to price | not computable | 0.54 | |
| Composite equity issuance, five years | not computable | (9.9%) | |
| Relative strength against the sector, log excess return | (0.01) | (0.02) | 51 |

## Diagnostics

*shown on every report; none enters the grade*

| Measure | Value |
|---|---|
| **Piotroski F-score None of 9, period end 2026-06-30** | |
| 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 | fail |
| No new shares issued | fail |
| Gross margin improved | pass |
| Asset turnover improved | pass |
| **Cash, filings, liquidity** | |
| Cash and equivalents | n/a |
| Operating cash flow, four quarters | n/a |
| Months of runway | not finite |
| Days since last periodic filing | 69 (10-K received Aug 19, 2026) |
| Median daily dollar volume, 63 sessions | $280.3M |

## 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 | $11.4B | 2026-06-30 | 2026-08-19 | 10-K | 26-000041 |
| 2 | assets | us-gaap:Assets | $19.8B | 2026-06-30 | 2026-08-19 | 10-K | 26-000041 |
| 3 | operating income | us-gaap:OperatingIncomeLoss | $2.1B | 2018-06-30 | 2020-08-28 | 10-K | 20-000065 |
| 4 | pretax income | us-gaap:IncomeLossFromContinuingOperationsBeforeInc... | $2.0B | 2018-06-30 | 2020-08-28 | 10-K | 20-000065 |
| 5 | income tax | us-gaap:IncomeTaxExpenseBenefit | $863.0M | 2018-06-30 | 2020-08-28 | 10-K | 20-000065 |
| 6 | total debt | us-gaap:LongTermDebtAndCapitalLeaseObligations | $3.4B | 2018-06-30 | 2019-08-23 | 10-K | 19-047085 |
| 7 | book equity | us-gaap:StockholdersEquity | $4.7B | 2018-06-30 | 2019-08-23 | 10-K | 19-047085 |
| 8 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $2.2B | 2018-06-30 | 2018-08-24 | 10-K | 18-053494 |
| 9 | total debt | us-gaap:LongTermDebtAndCapitalLeaseObligations | $3.4B | 2017-06-30 | 2018-08-24 | 10-K | 18-053494 |
| 10 | book equity | us-gaap:StockholdersEquity | $4.4B | 2017-06-30 | 2018-08-24 | 10-K | 18-053494 |
| 11 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $1.1B | 2017-06-30 | 2018-08-24 | 10-K | 18-053494 |
| 12 | net income | us-gaap:ProfitLoss | $182.0M | 2026-06-30 | 2026-08-19 | 10-K | 26-000041 |
| 13 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $1.8B | 2026-06-30 | 2026-08-19 | 10-K | 26-000041 |
| 14 | assets | us-gaap:Assets | $19.9B | 2025-06-30 | 2026-08-19 | 10-K | 26-000041 |
| 15 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $15.0B | 2026-06-30 | 2026-08-19 | 10-K | 26-000041 |
| 16 | gross profit | us-gaap:GrossProfit | $10.6B | 2025-06-30 | 2026-08-19 | 10-K | 26-000041 |
| 17 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $14.3B | 2025-06-30 | 2026-08-19 | 10-K | 26-000041 |
| 18 | gross profit | us-gaap:GrossProfit | $11.2B | 2024-06-30 | 2026-08-19 | 10-K | 26-000041 |
| 19 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $15.6B | 2024-06-30 | 2026-08-19 | 10-K | 26-000041 |
| 20 | gross profit | us-gaap:GrossProfit | $11.3B | 2023-06-30 | 2025-08-20 | 10-K | 25-000099 |
| 21 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $15.9B | 2023-06-30 | 2025-08-20 | 10-K | 25-000099 |
| 22 | gross profit | us-gaap:GrossProfit | $13.4B | 2022-06-30 | 2024-08-19 | 10-K | 24-000116 |
| 23 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $17.7B | 2022-06-30 | 2024-08-19 | 10-K | 24-000116 |
| 24 | current assets | us-gaap:AssetsCurrent | $7.2B | 2019-06-30 | 2020-08-28 | 10-K | 20-000065 |
| 25 | current liabilities | us-gaap:LiabilitiesCurrent | $4.6B | 2019-06-30 | 2020-08-28 | 10-K | 20-000065 |
| 26 | retained earnings | us-gaap:RetainedEarningsAccumulatedDeficit | $10.0B | 2019-06-30 | 2021-08-27 | 10-K | 21-000127 |
| 27 | operating income | us-gaap:OperatingIncomeLoss | $2.3B | 2019-06-30 | 2021-08-27 | 10-K | 21-000127 |

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| | | | | | | | |
|---|---|---|---|---|---|---|---|
| 28 | book equity | us-gaap:StockholdersEquity | $4.4B | 2019-06-30 | 2021-08-27 | 10-K | 21-000127 |
| 29 | assets | us-gaap:Assets | $13.2B | 2019-06-30 | 2021-08-27 | 10-K | 21-000127 |
| 30 | liabilities | us-gaap:Liabilities | $8.7B | 2019-06-30 | 2021-08-27 | 10-K | 21-000127 |
| 31 | depreciation amortization | us-gaap:DepreciationDepletionAndAmortization | $531.0M | 2018-06-30 | 2020-08-28 | 10-K | 20-000065 |
| 32 | operating income | us-gaap:OperatingIncomeLoss | $970.0M | 2024-06-30 | 2026-08-19 | 10-K | 26-000041 |
| 33 | interest expense | us-gaap:InterestExpense | $378.0M | 2024-06-30 | 2024-08-19 | 10-K | 24-000116 |
| 34 | current assets | us-gaap:AssetsCurrent | $7.6B | 2026-06-30 | 2026-08-19 | 10-K | 26-000041 |
| 35 | current liabilities | us-gaap:LiabilitiesCurrent | $6.2B | 2026-06-30 | 2026-08-19 | 10-K | 26-000041 |
| 36 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $457.0M | 2026-06-30 | 2026-08-19 | 10-K | 26-000041 |
| 37 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $1.3B | 2025-06-30 | 2026-08-19 | 10-K | 26-000041 |
| 38 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $602.0M | 2025-06-30 | 2026-08-19 | 10-K | 26-000041 |
| 39 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $2.4B | 2024-06-30 | 2026-08-19 | 10-K | 26-000041 |
| 40 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $919.0M | 2024-06-30 | 2026-08-19 | 10-K | 26-000041 |
| 41 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $1.7B | 2023-06-30 | 2025-08-20 | 10-K | 25-000099 |
| 42 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $1.0B | 2023-06-30 | 2025-08-20 | 10-K | 25-000099 |
| 43 | depreciation amortization | us-gaap:DepreciationDepletionAndAmortization | $796.0M | 2026-06-30 | 2026-08-19 | 10-K | 26-000041 |
| 44 | operating income | us-gaap:OperatingIncomeLoss | $780.0M | 2026-06-30 | 2026-08-19 | 10-K | 26-000041 |
| 45 | pretax income | us-gaap:IncomeLossFromContinuingOperationsBeforeInc... | $517.0M | 2026-06-30 | 2026-08-19 | 10-K | 26-000041 |
| 46 | income tax | us-gaap:IncomeTaxExpenseBenefit | $335.0M | 2026-06-30 | 2026-08-19 | 10-K | 26-000041 |
| 47 | current assets | us-gaap:AssetsCurrent | $7.1B | 2025-06-30 | 2026-08-19 | 10-K | 26-000041 |
| 48 | current liabilities | us-gaap:LiabilitiesCurrent | $5.4B | 2025-06-30 | 2026-08-19 | 10-K | 26-000041 |
| 49 | assets | us-gaap:Assets | $21.7B | 2024-06-30 | 2025-08-20 | 10-K | 25-000099 |
| 50 | assets | us-gaap:Assets | $23.4B | 2023-06-30 | 2024-08-19 | 10-K | 24-000116 |

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