Aptiv plc

APTV

NYSE; consumer durables; SIC 3714, Motor Vehicle Parts & Accessories; CIK 0001521332

B

second fifth of 458 graded peers in the pooled consumer group

rank 143 of 458; percentile 31.9; sampling error 2.3 points; lower is stronger

A B C D E

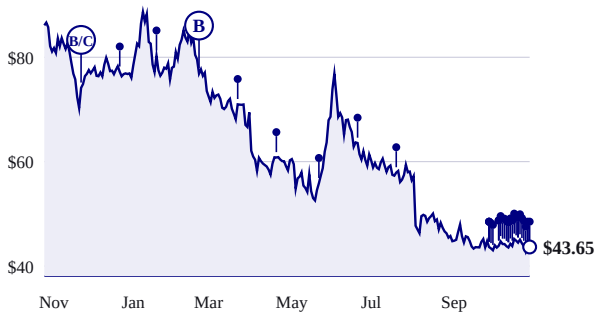
B, the elk



Scoreboard

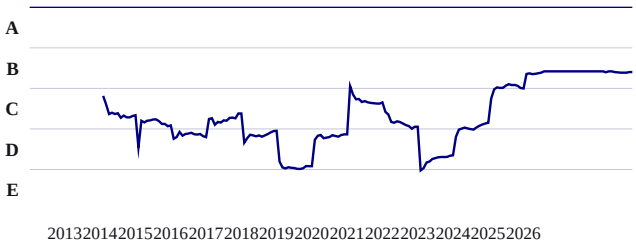
Profitability	C/D	percentile 58.5
Solvency	C	percentile 47.5
Growth and financing	A/B	percentile 20.3
Reliability	0.94 AUC	filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year	Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets	total assets $23.4B
Standard universe	inside	revenue above $1M and assets above $10M
Warnings	none triggered	not computable: distress
Inputs computable	13 of 14	
Graded from	filings received through Feb 6, 2026	264 days before the rescan; latest periodic filing 10-Q received Aug 4, 2026
Last close	$43.66	2026-10-27; market equity $9.1B; 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 6, 2026

In December 2024, Old Aptiv (as defined below), a public limited company formed under the laws of Jersey on May 19, 2011, completed its previously announced reorganization transaction (the "Transaction," or the "reorganization transaction"), in which Old Aptiv established a new publicly-listed Jersey parent company, Aptiv Holdings Limited ("New Aptiv"), which is resident for tax purposes in Switzerland. As a result of the Transaction, all issued and outstanding ordinary shares of Old Aptiv were exchanged on a one-for-one basis for newly issued ordinary shares of New Aptiv.

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 58.5						
Gross profitability	16.6%	34.4%		77.3	472	2025-12-31
Return on invested capital	1.9%	8.9%		79.0	163	2025-12-31
Accruals ratio	(8.6%)	(5.1%)		29.9	519	2025-12-31

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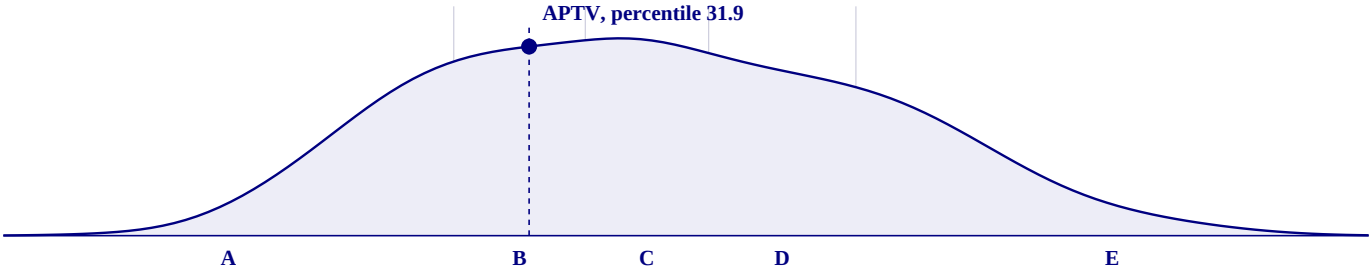
Gross margin stability, five years	1.6 pts	1.7 pts	47.7	406	2025-12-31
Solvency, sleeve percentile 47.5					
Twelve-month failure probability	not computable	0.04%			
latest liabilities, cash plus short-term investments, book equity, and shares are required					
Altman Z double-prime	2.94	2.13	38.2	396	2025-12-31
Net debt to EBITDA	2.86x	2.08x	64.0	187	2025-12-31
Interest coverage	3.28x	2.64x	45.2	127	2025-12-31
Current ratio	1.74x	1.56x	42.5	535	2025-12-31
Growth and financing, sleeve percentile 20.3					
Revenue growth, three-year compound	5.3%	1.4%	30.5	480	2025-12-31
Free cash flow growth, three-year compound	54.0%	7.6%	13.3	250	2025-12-31
Reinvestment rate	314.0%	12.3%	4.2	266	2025-12-31
Asset growth, three years	2.3%	1.7%	45.2	485	2025-12-31
Net share issuance, one year	(7.3%)	(0.3%)	8.2	378	2026-01-30

Among 458 peers

consumer durables; 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
138	Chefs' Warehouse, Inc. (CHEF)	31.0	B	
139	Stoneridge Inc. (SRI)	31.3	B	late filer
140	Natural Grocers by Vitamin Cottage, Inc. (NGVC)	31.4	B	
141	Medifast Inc. (MED)	31.7	B	
142	Coupang, Inc. (CPNG)	31.8	B	fortress balance sheet
143	Aptiv plc (APTV)	31.9	B	
144	Home Depot, Inc. (HD)	32.2	B	
145	Levi Strauss & Co. (LEVI)	32.5	B	
146	Ethan Allen Interiors Inc. (ETD)	32.6	B	fortress balance sheet
147	Biglari Holdings Inc. (BH)	32.7	B	
148	Biglari Holdings Inc. (BH-A)	32.7	B	

What the price implies

at the 2026-10-27 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(38.7%)	(0.1%)	12
Distance from 52-week high	(50.8%)	(24.5%)	18
EBIT to enterprise value	8.7%	4.8%	82
Free cash flow yield	16.9%	4.4%	91
Book value to price	0.97	0.43	78
Sales to price	2.25	1.46	65
Composite equity issuance, five years	(42.9%)	(16.0%)	8
Relative strength against the sector, log excess return	(0.47)	(0.01)	13

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Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 8 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	pass
No new shares issued	pass
Gross margin improved	pass
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$761.0M
Operating cash flow, four quarters	$1.4B
Months of runway	not finite
Days since last periodic filing	85 (10-Q received Aug 4, 2026)
Median daily dollar volume, 63 sessions	$154.5M

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...	$20.4B	2025-12-31	2026-02-06	10-K	26-000009
2	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$16.5B	2025-12-31	2026-02-06	10-K	26-000009
3	assets	us-gaap:Assets	$23.4B	2025-12-31	2026-02-06	10-K	26-000009
4	operating income	us-gaap:OperatingIncomeLoss	$1.2B	2025-12-31	2026-02-06	10-K	26-000009
5	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$919.0M	2025-12-31	2026-02-06	10-K	26-000009
6	income tax	us-gaap:IncomeTaxExpenseBenefit	$700.0M	2025-12-31	2026-02-06	10-K	26-000009
7	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$7.5B	2025-12-31	2026-02-06	10-K	26-000009
8	book equity	us-gaap:StockholdersEquity	$9.2B	2025-12-31	2026-02-06	10-K	26-000009
9	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$1.9B	2025-12-31	2026-02-06	10-K	26-000009
10	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$7.8B	2024-12-31	2026-02-06	10-K	26-000009
11	book equity	us-gaap:StockholdersEquity	$8.8B	2024-12-31	2026-02-06	10-K	26-000009
12	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$1.6B	2024-12-31	2026-02-06	10-K	26-000009
13	net income	us-gaap:NetIncomeLoss	$165.0M	2025-12-31	2026-02-06	10-K	26-000009
14	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$2.2B	2025-12-31	2026-02-06	10-K	26-000009
15	assets	us-gaap:Assets	$23.5B	2024-12-31	2026-02-06	10-K	26-000009
16	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$19.7B	2024-12-31	2026-02-06	10-K	26-000009
17	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$16.0B	2024-12-31	2026-02-06	10-K	26-000009
18	revenue	us-gaap:Revenues	$20.1B	2023-12-31	2026-02-06	10-K	26-000009
19	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$16.6B	2023-12-31	2026-02-06	10-K	26-000009
20	revenue	us-gaap:Revenues	$17.5B	2022-12-31	2025-02-07	10-K	25-000010
21	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$14.9B	2022-12-31	2025-02-07	10-K	25-000010
22	revenue	us-gaap:Revenues	$15.6B	2021-12-31	2024-02-06	10-K	24-000011
23	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$13.2B	2021-12-31	2024-02-06	10-K	24-000011
24	current assets	us-gaap:AssetsCurrent	$8.7B	2025-12-31	2026-02-06	10-K	26-000009
25	current liabilities	us-gaap:LiabilitiesCurrent	$5.0B	2025-12-31	2026-02-06	10-K	26-000009
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$6.2B	2025-12-31	2026-02-06	10-K	26-000009
27	liabilities	us-gaap:Liabilities	$13.9B	2025-12-31	2026-02-06	10-K	26-000009
28	depreciation amortization	us-gaap:Depreciation	$783.0M	2025-12-31	2026-02-06	10-K	26-000009
29	interest expense	us-gaap:InterestExpense	$361.0M	2025-12-31	2026-02-06	10-K	26-000009
30	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$656.0M	2025-12-31	2026-02-06	10-K	26-000009
31	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$2.4B	2024-12-31	2026-02-06	10-K	26-000009

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32	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$830.0M	2024-12-31	2026-02-06	10-K	26-000009
33	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$1.9B	2023-12-31	2026-02-06	10-K	26-000009
34	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$906.0M	2023-12-31	2026-02-06	10-K	26-000009
35	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$1.3B	2022-12-31	2025-02-07	10-K	25-000010
36	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$844.0M	2022-12-31	2023-02-08	10-K	23-000013
37	current assets	us-gaap:AssetsCurrent	$7.8B	2024-12-31	2026-02-06	10-K	26-000009
38	current liabilities	us-gaap:LiabilitiesCurrent	$5.1B	2024-12-31	2026-02-06	10-K	26-000009
39	assets	us-gaap:Assets	$24.4B	2023-12-31	2025-02-07	10-K	25-000010
40	assets	us-gaap:Assets	$21.9B	2022-12-31	2024-02-06	10-K	24-000011
41	shares outstanding	dei:EntityCommonStockSharesOutstanding	212,748,401	2026-01-30	2026-02-06	10-K	26-000009
42	shares outstanding	dei:EntityCommonStockSharesOutstanding	229,446,368	2025-01-31	2025-02-07	10-K	25-000010

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