Celestica Inc.

CLS

NYSE; business equipment; SIC 3672, Printed Circuit Boards; CIK 0001030894

B

second fifth of 496 graded peers in business equipment

rank 168 of 496; percentile 33.7; sampling error 2.2 points; lower is stronger

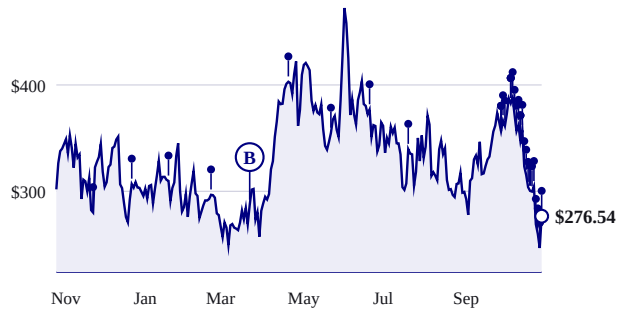
A B C D E

B, the elk



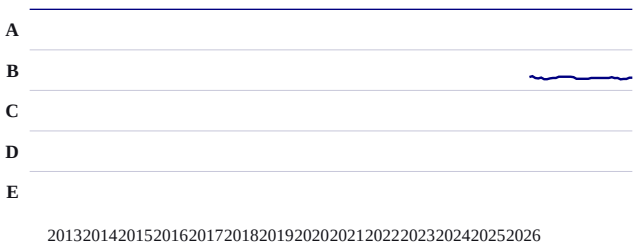
Scoreboard	
Profitability	C percentile 54.1
Solvency	B/C percentile 40.7
Growth and financing	B percentile 37.4
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $7.2B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress
Inputs computable	8 of 14
Graded from	filings received through Feb 27, 2026 243 days before the rescan; latest periodic filing 10-Q received Oct 26, 2026
Last close	$276.14 2026-10-27; market equity $34.8B; 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 27, 2026

We were incorporated in Ontario, Canada on September 27, 1996. We are a corporation domiciled in the Province of Ontario, Canada and operate under the Business Corporations Act (Ontario) (OBCA). Our principal executive offices and global headquarters are located at 5140 Yonge Street, Suite 1900, Toronto, Ontario, Canada M2N 6L7. Our telephone number is (416) 448-5800, and our internet address is www.celestica.com. We operate a network of sites and design centers strategically located in North America, Asia, and Europe. Information on our website is not incorporated by reference into this Annual Report.

The fourteen inputs

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

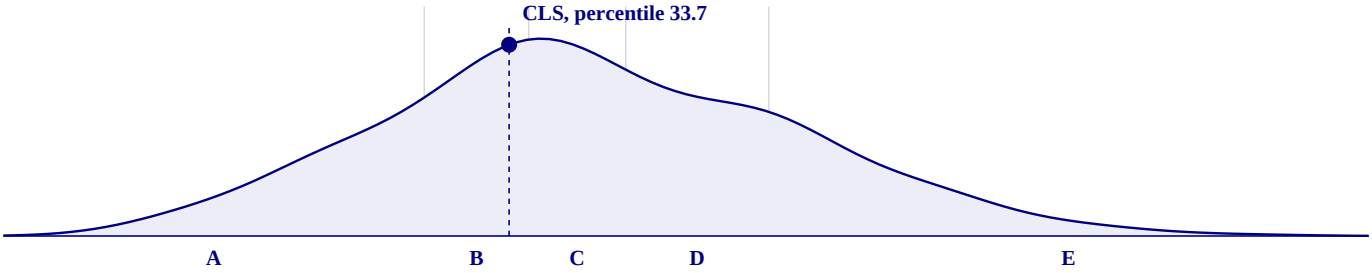
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 54.1						
Gross profitability	20.7%	28.6%		62.3	555	2025-12-31
Return on invested capital	38.2%	11.2%		10.5	134	2025-12-31
Accruals ratio	2.6%	(7.3%)		89.5	618	2025-12-31

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Gross margin stability, five years	not computable	2.3 pts				
five annual gross margins are required; found 2						
Solvency, sleeve percentile 40.7						
Twelve-month failure probability	not computable	0.05%				
latest liabilities, cash plus short-term investments, book equity, and shares are required						
Altman Z double-prime	3.20	2.15		34.0	565	2025-12-31
Net debt to EBITDA	0.13x	1.11x		22.6	147	2025-12-31
Interest coverage	not computable	3.77x				
one or more required annual facts are missing						
Current ratio	1.44x	2.01x		65.4	662	2025-12-31
Growth and financing, sleeve percentile 37.4						
Revenue growth, three-year compound	not computable	6.4%				
four annual observations are required; found 2						
Free cash flow growth, three-year compound	not computable	18.1%				
four consecutive annual FCF observations are required; found 2						
Reinvestment rate	30.4%	14.3%		44.4	224	2025-12-31
Asset growth, three years	not computable	5.1%				
four annual observations are required; found 2						
Net share issuance, one year	(0.9%)	0.5%		30.4	409	2026-02-19

Among 496 peers

business equipment; 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
163	Snap Inc. (SNAP)	32.7	B	
164	Veralto Corp. (VLTO)	32.9	B	
165	Consensus Cloud Solutions, Inc. (CCSI)	33.1	B	
166	Coursera, Inc. (COUR)	33.3	B	
167	Twilio Inc. (TWLO)	33.5	B	
168	Celestica Inc. (CLS)	33.7	B	
169	Texas Instruments Inc. (TXN)	33.9	B	
170	Intapp, Inc. (INTA)	34.1	B	
171	Extreme Networks Inc. (EXTR)	34.3	B	fortress balance sheet
172	Fabrinet (FN)	34.5	B	fortress balance sheet
173	Paylocity Holding Corp. (PCTY)	34.7	B	fortress balance sheet

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	21.5%	2.2%	66
Distance from 52-week high	(41.5%)	(29.9%)	38
EBIT to enterprise value	3.3%	1.4%	65
Free cash flow yield	1.3%	2.8%	35

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Book value to price	0.18	0.25	38
Sales to price	0.36	0.31	55
Composite equity issuance, five years	not computable	4.2%	
Relative strength against the sector, log excess return	(0.09)	(0.26)	66

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	fail
Long-term leverage fell	fail
Current ratio improved	fail
No new shares issued	pass
Gross margin improved	pass
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$4.0B
Operating cash flow, four quarters	$1.4B
Months of runway	not finite
Days since last periodic filing	2 (10-Q received Oct 26, 2026)
Median daily dollar volume, 63 sessions	$765.4M

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	$1.5B	2025-12-31	2026-02-27	10-K	26-000011
2	assets	us-gaap:Assets	$7.2B	2025-12-31	2026-02-27	10-K	26-000011
3	operating income	us-gaap:OperatingIncomeLoss	$1.0B	2025-12-31	2026-02-27	10-K	26-000011
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$983.2M	2025-12-31	2026-02-27	10-K	26-000011
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$150.7M	2025-12-31	2026-02-27	10-K	26-000011
6	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$750.5M	2025-12-31	2026-02-27	10-K	26-000011
7	book equity	us-gaap:StockholdersEquity	$2.2B	2025-12-31	2026-02-27	10-K	26-000011
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$595.6M	2025-12-31	2026-02-27	10-K	26-000011
9	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$770.2M	2024-12-31	2026-02-27	10-K	26-000011
10	book equity	us-gaap:StockholdersEquity	$1.9B	2024-12-31	2026-02-27	10-K	26-000011
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$423.3M	2024-12-31	2026-02-27	10-K	26-000011
12	net income	us-gaap:NetIncomeLoss	$832.5M	2025-12-31	2026-02-27	10-K	26-000011
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$659.5M	2025-12-31	2026-02-27	10-K	26-000011
14	assets	us-gaap:Assets	$6.0B	2024-12-31	2026-02-27	10-K	26-000011
15	current assets	us-gaap:AssetsCurrent	$5.7B	2025-12-31	2026-02-27	10-K	26-000011
16	current liabilities	us-gaap:LiabilitiesCurrent	$3.9B	2025-12-31	2026-02-27	10-K	26-000011
17	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$408.7M	2025-12-31	2026-02-27	10-K	26-000011
18	liabilities	us-gaap:Liabilities	$5.0B	2025-12-31	2026-02-27	10-K	26-000011
19	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$175.7M	2025-12-31	2026-02-27	10-K	26-000011
20	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$12.4B	2025-12-31	2026-02-27	10-K	26-000011
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$9.6B	2024-12-31	2026-02-27	10-K	26-000011
22	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$201.2M	2025-12-31	2026-02-27	10-K	26-000011
23	current assets	us-gaap:AssetsCurrent	$4.5B	2024-12-31	2026-02-27	10-K	26-000011
24	current liabilities	us-gaap:LiabilitiesCurrent	$3.0B	2024-12-31	2026-02-27	10-K	26-000011
25	shares outstanding	dei:EntityCommonStockSharesOutstanding	114,967,854	2026-02-19	2026-02-27	10-K	26-000011
26	shares outstanding	dei:EntityCommonStockSharesOutstanding	115,959,118	2025-02-20	2025-03-03	10-K	25-000014

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