ELI Lilly & Co.

LLY

NYSE; healthcare; SIC 2834, Pharmaceutical Preparations; CIK 0000059478

C

middle fifth of 370 graded peers in healthcare

rank 207 of 370; percentile 55.8; sampling error 2.5 points; lower is stronger

A B C D E

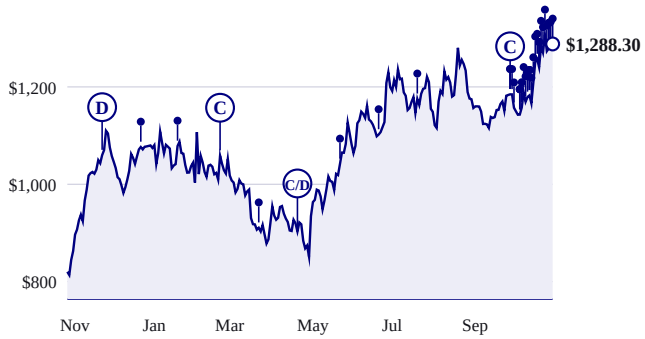
C, the tortoise



Scoreboard

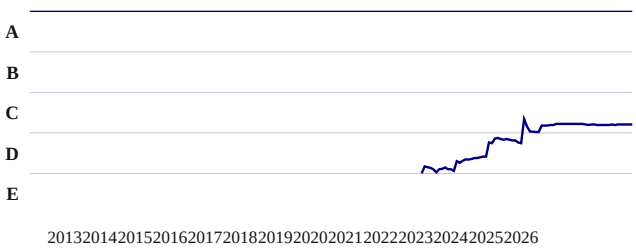
Profitability	C percentile 55.6
Solvency	D/E percentile 78.7
Growth and financing	A percentile 15.3
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $112.5B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress
Inputs computable	7 of 14
Graded from	filings received through Feb 12, 2026 259 days before the rescan; latest periodic filing 10-Q received Aug 5, 2026
Last close	$1,290.67 2026-10-28; market equity $1.2T; 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 12, 2026

Eli Lilly and Company (referred to as the company, Lilly, we, or us) was incorporated in 1901 in Indiana to succeed to the drug manufacturing business founded in Indianapolis, Indiana, in 1876 by Colonel Eli Lilly. We discover, develop, manufacture, and market products in a single business segment-human pharmaceutical products. Our purpose is to unite caring with discovery to create medicines that make life better for people around the world. Our long-term success depends on our ability to continually discover or acquire, develop, and commercialize innovative medicines.

The fourteen inputs

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

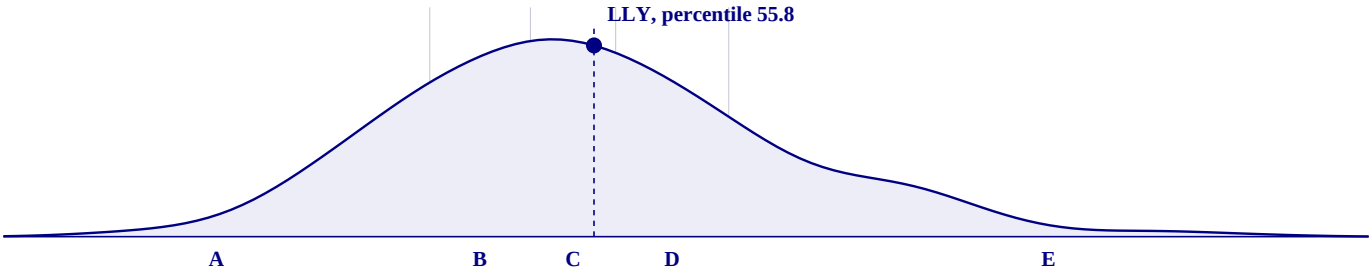
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 55.6						
Gross profitability	48.1%	32.3%		24.5	369	2025-12-31
Return on invested capital	not computable	9.3%				
one or more required annual facts are missing						

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Accruals ratio	4.0%	(6.6%)	87.1	805	2025-12-31
Gross margin stability, five years	3.2 pts	2.8 pts	55.2	242	2025-12-31
Solvency, sleeve percentile 78.7					
Twelve-month failure probability	not computable	0.07%			
liabilities and a nearby cover-page share count are required at 2026-06-30					
Altman Z double-prime	not computable	(0.33)			
one or more required annual facts are missing					
Net debt to EBITDA	not computable	1.82x			
one or more required annual facts are missing					
Interest coverage	not computable	(4.51x)			
one or more required annual facts are missing					
Current ratio	1.58x	2.94x	78.7	832	2025-12-31
Growth and financing, sleeve percentile 15.3					
Revenue growth, three-year compound	31.7%	10.1%	20.9	413	2025-12-31
Free cash flow growth, three-year compound	not computable	10.9%			
four consecutive annual FCF observations are required; found 0					
Reinvestment rate	not computable	37.1%			
one or more required annual facts are missing					
Asset growth, three years	31.5%	2.1%	15.2	697	2025-12-31
Net share issuance, one year	(0.5%)	2.5%	9.8	633	2026-02-09

Among 370 peers

healthcare; 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
202	Cabaletta Bio, Inc. (CABA)	54.5	C	dilution
203	Teladoc Health, Inc. (TDOC)	54.7	C	fortress balance sheet
204	Abbott Laboratories (ABT)	55.0	C	
205	Neuronetics, Inc. (STIM)	55.3	C	
206	Regenxbio Inc. (RGNX)	55.6	C	short runway
207	ELI Lilly & Co. (LLY)	55.8	C	
208	Inogen Inc. (INGN)	56.1	C	fortress balance sheet
209	AdaptHealth Corp. (AHCO)	56.4	C	
210	Aquestive Therapeutics, Inc. (AQST)	56.6	C	
211	Cooper Companies, Inc. (COO)	56.9	C	
212	Perspective Therapeutics, Inc. (CATX)	57.2	C	dilution, fortress balance sheet

What the price implies

at the 2026-10-28 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	52.6%	7.7%	77
Distance from 52-week high	(1.4%)	(27.7%)	90
EBIT to enterprise value	not computable	(1.5%)	

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Free cash flow yield	not computable	(1.0%)	
Book value to price	0.03	0.27	15
Sales to price	0.05	0.31	17
Composite equity issuance, five years	(7.1%)	20.5%	18
Relative strength against the sector, log excess return	0.21	(0.14)	77

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 7 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	fail
Long-term leverage fell	fail
Current ratio improved	pass
No new shares issued	pass
Gross margin improved	pass
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$8.9B
Operating cash flow, four quarters	$28.1B
Months of runway	not finite
Days since last periodic filing	85 (10-Q received Aug 5, 2026)
Median daily dollar volume, 63 sessions	$2.7B

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:Revenues	$65.2B	2025-12-31	2026-02-12	10-K	26-000013
2	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$11.1B	2025-12-31	2026-02-12	10-K	26-000013
3	assets	us-gaap:Assets	$112.5B	2025-12-31	2026-02-12	10-K	26-000013
4	net income	us-gaap:NetIncomeLoss	$20.6B	2025-12-31	2026-02-12	10-K	26-000013
5	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$16.8B	2025-12-31	2026-02-12	10-K	26-000013
6	assets	us-gaap:Assets	$78.7B	2024-12-31	2026-02-12	10-K	26-000013
7	revenue	us-gaap:Revenues	$45.0B	2024-12-31	2026-02-12	10-K	26-000013
8	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$8.4B	2024-12-31	2026-02-12	10-K	26-000013
9	revenue	us-gaap:Revenues	$34.1B	2023-12-31	2026-02-12	10-K	26-000013
10	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$7.1B	2023-12-31	2026-02-12	10-K	26-000013
11	revenue	us-gaap:Revenues	$28.5B	2022-12-31	2025-02-19	10-K	25-000067
12	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$6.6B	2022-12-31	2025-02-19	10-K	25-000067
13	revenue	us-gaap:Revenues	$28.3B	2021-12-31	2024-02-21	10-K	24-000065
14	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$7.3B	2021-12-31	2024-02-21	10-K	24-000065
15	current assets	us-gaap:AssetsCurrent	$55.6B	2025-12-31	2026-02-12	10-K	26-000013
16	current liabilities	us-gaap:LiabilitiesCurrent	$35.2B	2025-12-31	2026-02-12	10-K	26-000013
17	assets	us-gaap:Assets	$64.0B	2023-12-31	2025-02-19	10-K	25-000067
18	assets	us-gaap:Assets	$49.5B	2022-12-31	2024-02-21	10-K	24-000065
19	shares outstanding	dei:EntityCommonStockSharesOutstanding	943,357,420	2026-02-09	2026-02-12	10-K	26-000013
20	shares outstanding	dei:EntityCommonStockSharesOutstanding	948,169,999	2025-02-14	2025-02-19	10-K	25-000067

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