Allegion plc

ALLE

NYSE; other; SIC 7381, Services-Detective, Guard & Armored Car Services; CIK 0001579241

A/B

on the A/B boundary of 336 graded peers in other

rank 70 of 336; percentile 20.6; sampling error 2.6 points; lower is stronger

A B C D E

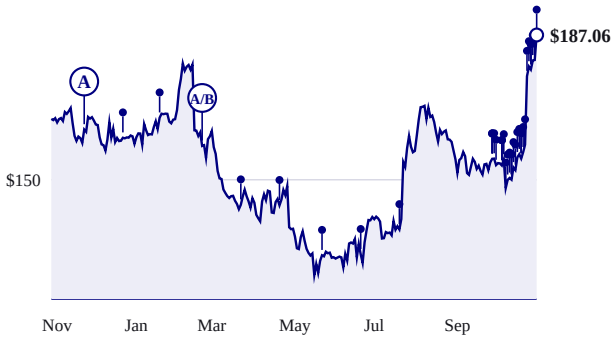
A/B, the bull



Scoreboard

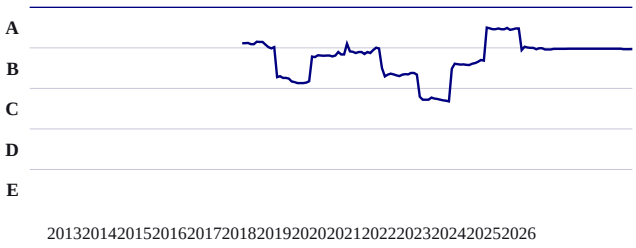
Profitability	B/C percentile 40.8
Solvency	B percentile 29.0
Growth and financing	B/C percentile 42.3
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $5.2B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: short runway, distress
Inputs computable	13 of 14
Graded from	filings received through Feb 17, 2026 255 days before the rescan; latest periodic filing 10-Q received Oct 22, 2026
Last close	$187.31 2026-10-29; market equity $15.8B; 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 17, 2026

Allegion plc ("Allegion," "we," "us" or "the Company") is a leading global provider of security products and solutions that keep people and assets safe and secure in the places they live, learn, work and connect. We pioneer safety and security to create a safer and more accessible world. Both developing and partnering are central to our work to create ecosystems that enable seamless access experiences and an uninterrupted and secure flow of people and assets. We offer an extensive and versatile portfolio of security and access control products and solutions across a range of market-leading brands.

The fourteen inputs

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

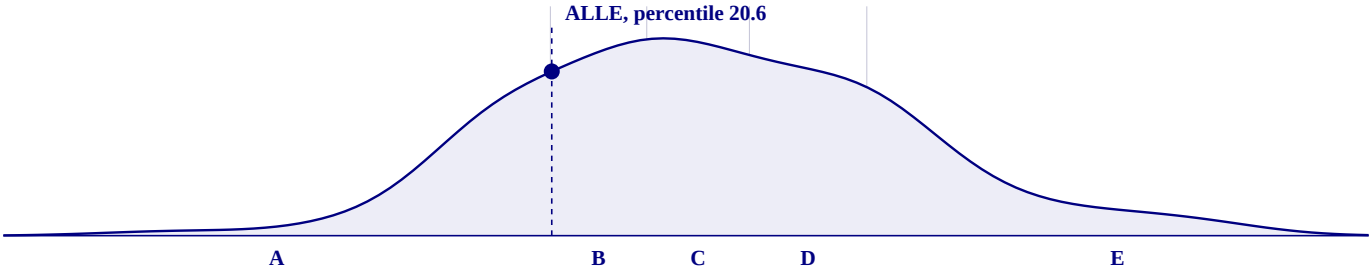
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 40.8						
Gross profitability	35.2%	27.0%		33.2	287	2025-12-31
Return on invested capital	21.5%	10.0%		19.3	151	2025-12-31
Accruals ratio	(2.9%)	(5.8%)		71.9	503	2025-12-31

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Gross margin stability, five years	1.7 pts	2.2 pts	38.7	205	2025-12-31
Solvency, sleeve percentile 29.0					
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	3.99	2.05	21.4	385	2025-12-31
Net debt to EBITDA	1.64x	2.52x	37.6	182	2025-12-31
Interest coverage	8.51x	2.45x	26.4	88	2025-12-31
Current ratio	1.84x	1.32x	30.6	507	2025-12-31
Growth and financing, sleeve percentile 42.3					
Revenue growth, three-year compound	7.5%	5.0%	38.6	400	2025-12-31
Free cash flow growth, three-year compound	20.1%	8.7%	33.6	221	2025-12-31
Reinvestment rate	(16.7%)	11.6%	64.2	191	2025-12-31
Asset growth, three years	9.4%	4.2%	29.1	437	2025-12-31
Net share issuance, one year	(0.2%)	(0.5%)	46.0	353	2026-02-12

Among 336 peers

other; 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
65	UFP Industries Inc. (UFPI)	19.1	A/B	fortress balance sheet
66	Hunt J B Transport Services Inc. (JBHT)	19.4	A/B	
67	Stran & Company, Inc. (SWAG)	19.9	A/B	late filer, fortress balance sheet
68	Stran & Company, Inc. (SWAGW)	19.9	A/B	late filer, fortress balance sheet
69	Laureate Education, Inc. (LAUR)	20.3	A/B	fortress balance sheet
70	Allegion plc (ALLE)	20.6	A/B	
71	Information Services Group Inc. (III)	20.9	A/B	
72	Live Nation Entertainment, Inc. (LYV)	21.2	A/B	
73	Etsy Inc. (ETSY)	21.5	A/B	
74	Centrus Energy Corp. (LEU)	21.8	A/B	fortress balance sheet
75	Tutor Perini Corp. (TPC)	22.1	A/B	fortress balance sheet

What the price implies

at the 2026-10-29 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(12.0%)	2.0%	36
Distance from 52-week high	0.0%	(24.2%)	97
EBIT to enterprise value	4.9%	4.3%	58
Free cash flow yield	4.3%	4.1%	51
Book value to price	0.14	0.33	24
Sales to price	0.26	0.70	21
Composite equity issuance, five years	(14.0%)	(8.8%)	43
Relative strength against the sector, log excess return	(0.27)	(0.13)	36

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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	pass
Operating cash flow exceeds net income	pass
Long-term leverage fell	pass
Current ratio improved	fail
No new shares issued	pass
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	8 (10-Q received Oct 22, 2026)
Median daily dollar volume, 63 sessions	$165.0M

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...	$4.1B	2025-12-31	2026-02-17	10-K	26-000007
2	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$2.2B	2025-12-31	2026-02-17	10-K	26-000007
3	assets	us-gaap:Assets	$5.2B	2025-12-31	2026-02-17	10-K	26-000007
4	operating income	us-gaap:OperatingIncomeLoss	$859.5M	2025-12-31	2026-02-17	10-K	26-000007
5	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$768.4M	2025-12-31	2026-02-17	10-K	26-000007
6	income tax	us-gaap:IncomeTaxExpenseBenefit	$124.6M	2025-12-31	2026-02-17	10-K	26-000007
7	total debt	us-gaap:LongTermDebt	$2.0B	2025-12-31	2026-02-17	10-K	26-000007
8	book equity	us-gaap:StockholdersEquityIncludingPortionAttributableT...	$2.1B	2025-12-31	2026-02-17	10-K	26-000007
9	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$356.2M	2025-12-31	2026-02-17	10-K	26-000007
10	total debt	us-gaap:LongTermDebt	$2.0B	2024-12-31	2026-02-17	10-K	26-000007
11	book equity	us-gaap:StockholdersEquityIncludingPortionAttributableT...	$1.5B	2024-12-31	2026-02-17	10-K	26-000007
12	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$503.8M	2024-12-31	2026-02-17	10-K	26-000007
13	net income	us-gaap:NetIncomeLoss	$643.8M	2025-12-31	2026-02-17	10-K	26-000007
14	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$783.8M	2025-12-31	2026-02-17	10-K	26-000007
15	assets	us-gaap:Assets	$4.5B	2024-12-31	2026-02-17	10-K	26-000007
16	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$3.8B	2024-12-31	2026-02-17	10-K	26-000007
17	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$2.1B	2024-12-31	2026-02-17	10-K	26-000007
18	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$3.7B	2023-12-31	2026-02-17	10-K	26-000007
19	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$2.1B	2023-12-31	2026-02-17	10-K	26-000007
20	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$3.3B	2022-12-31	2025-02-18	10-K	25-000008
21	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$1.9B	2022-12-31	2025-02-18	10-K	25-000008
22	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$2.9B	2021-12-31	2024-02-20	10-K	24-000006
23	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$1.7B	2021-12-31	2024-02-20	10-K	24-000006
24	current assets	us-gaap:AssetsCurrent	$1.4B	2025-12-31	2026-02-17	10-K	26-000007
25	current liabilities	us-gaap:LiabilitiesCurrent	$755.4M	2025-12-31	2026-02-17	10-K	26-000007
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$2.2B	2025-12-31	2026-02-17	10-K	26-000007
27	liabilities	us-gaap:Liabilities	$3.2B	2025-12-31	2026-02-17	10-K	26-000007
28	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$129.7M	2025-12-31	2026-02-17	10-K	26-000007
29	interest expense	us-gaap:InterestExpense	$101.0M	2025-12-31	2026-02-17	10-K	26-000007
30	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$98.1M	2025-12-31	2026-02-17	10-K	26-000007
31	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$675.0M	2024-12-31	2026-02-17	10-K	26-000007

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32	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$92.1M	2024-12-31	2025-02-18	10-K	25-000008
33	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$600.6M	2023-12-31	2026-02-17	10-K	26-000007
34	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$84.2M	2023-12-31	2025-02-18	10-K	25-000008
35	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$459.5M	2022-12-31	2025-02-18	10-K	25-000008
36	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$64.0M	2022-12-31	2025-02-18	10-K	25-000008
37	current assets	us-gaap:AssetsCurrent	$1.4B	2024-12-31	2026-02-17	10-K	26-000007
38	current liabilities	us-gaap:LiabilitiesCurrent	$696.9M	2024-12-31	2026-02-17	10-K	26-000007
39	assets	us-gaap:Assets	$4.3B	2023-12-31	2026-02-17	10-K	26-000007
40	assets	us-gaap:Assets	$4.0B	2022-12-31	2025-02-18	10-K	25-000008
41	shares outstanding	dei:EntityCommonStockSharesOutstanding	86,145,484	2026-02-12	2026-02-17	10-K	26-000007
42	shares outstanding	dei:EntityCommonStockSharesOutstanding	86,290,351	2025-02-14	2025-02-18	10-K	25-000008

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