Ametek

AME

NYSE; business equipment; SIC 3823, Industrial Instruments For Measurement, Display, and Control; CIK 0001037868

C

middle fifth of 496 graded peers in business equipment

rank 234 of 496; percentile 47.1; sampling error 2.2 points; lower is stronger

A B C D E

C, the tortoise



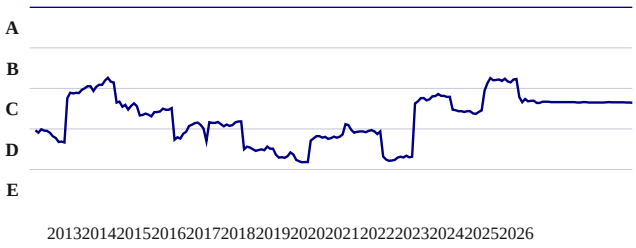
Scoreboard	
Profitability	C percentile 49.0
Solvency	C percentile 46.8
Growth and financing	C percentile 46.4
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $16.1B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress
Inputs computable	12 of 14
Graded from	filings received through Feb 17, 2026 256 days before the rescan; latest periodic filing 10-Q received Aug 4, 2026
Last close	$241.13 2026-10-30; market equity $55.3B; 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

AMETEK, Inc. ("AMETEK" or the "Company") is incorporated in Delaware. Its predecessor was originally incorporated in Delaware in 1930 under the name American Machine and Metals, Inc. AMETEK is a leading global manufacturer of electronic instruments and electromechanical devices with operations in North America, Europe, Asia and South America. AMETEK maintains its principal executive offices at 1100 Cassatt Road, Berwyn, Pennsylvania, 19312. Listed on the New York Stock Exchange (symbol: AME), the common stock of AMETEK is a component of the Standard and Poor's 500 and the Russell 1000 Indices.

The fourteen inputs

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

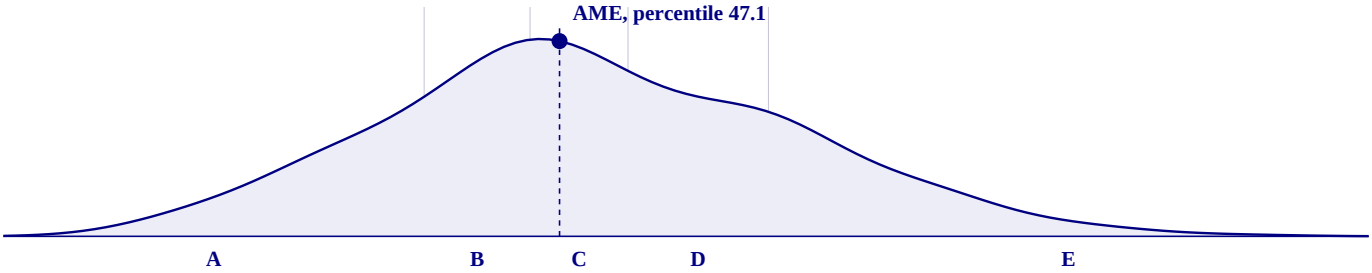
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 49.0						
Gross profitability	16.6%	28.7%		68.7	554	2025-12-31
Return on invested capital	13.2%	11.4%		42.4	133	2025-12-31
Accruals ratio	(2.1%)	(7.3%)		78.7	617	2025-12-31

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Gross margin stability, five years	0.7 pts	2.3 pts	6.1	425	2025-12-31
Solvency, sleeve percentile 46.8					
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	5.41	2.15	20.4	564	2025-12-31
Net debt to EBITDA	0.89x	1.09x	41.4	146	2025-12-31
Interest coverage	not computable	3.77x			
latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31					
Current ratio	1.06x	2.01x	78.6	661	2025-12-31
Growth and financing, sleeve percentile 46.4					
Revenue growth, three-year compound	6.4%	6.4%	50.1	534	2025-12-31
Free cash flow growth, three-year compound	18.3%	18.1%	49.4	264	2025-12-31
Reinvestment rate	(21.8%)	13.5%	62.6	223	2025-12-31
Asset growth, three years	8.9%	5.1%	36.7	559	2025-12-31
Net share issuance, one year	(0.7%)	0.5%	32.9	408	2026-01-30

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
229	Illumina, Inc. (ILMN)	46.1	C	
230	Western Digital Corp. (WDC)	46.3	C	fortress balance sheet
231	Snowflake Inc. (SNOW)	46.5	C	
232	nCino, Inc. (NCNO)	46.7	C	
233	CSP Inc. (CSPI)	46.9	C	
234	Ametek (AME)	47.1	C	
235	Hurco Companies Inc. (HURC)	47.3	C	
236	ACI Worldwide, Inc. (ACIW)	47.5	C	
237	Audioeye Inc. (AEYE)	47.7	C	
238	Planet Labs PBC (PL)	47.9	C	
239	SentinelOne, Inc. (S)	48.1	C	

What the price implies

at the 2026-10-30 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	25.5%	2.2%	69
Distance from 52-week high	(6.7%)	(32.4%)	86
EBIT to enterprise value	3.3%	1.6%	65
Free cash flow yield	3.0%	2.8%	51
Book value to price	0.20	0.27	42
Sales to price	0.13	0.31	25
Composite equity issuance, five years	(4.1%)	4.3%	35
Relative strength against the sector, log excess return	(0.06)	(0.26)	69

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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	$495.4M
Operating cash flow, four quarters	$2.0B
Months of runway	not finite
Days since last periodic filing	88 (10-Q received Aug 4, 2026)
Median daily dollar volume, 63 sessions	$324.9M

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...	$7.4B	2025-12-31	2026-02-17	10-K	26-000016
2	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$4.7B	2025-12-31	2026-02-17	10-K	26-000016
3	assets	us-gaap:Assets	$16.1B	2025-12-31	2026-02-17	10-K	26-000016
4	operating income	us-gaap:OperatingIncomeLoss	$1.9B	2025-12-31	2026-02-17	10-K	26-000016
5	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$1.8B	2025-12-31	2026-02-17	10-K	26-000016
6	income tax	us-gaap:IncomeTaxExpenseBenefit	$318.2M	2025-12-31	2026-02-17	10-K	26-000016
7	total debt	us-gaap:LongTermDebt	$2.3B	2025-12-31	2026-02-17	10-K	26-000016
8	book equity	us-gaap:StockholdersEquity	$10.6B	2025-12-31	2026-02-17	10-K	26-000016
9	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$458.0M	2025-12-31	2026-02-17	10-K	26-000016
10	total debt	us-gaap:LongTermDebt	$2.1B	2024-12-31	2026-02-17	10-K	26-000016
11	book equity	us-gaap:StockholdersEquity	$9.7B	2024-12-31	2026-02-17	10-K	26-000016
12	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$374.0M	2024-12-31	2026-02-17	10-K	26-000016
13	net income	us-gaap:NetIncomeLoss	$1.5B	2025-12-31	2026-02-17	10-K	26-000016
14	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$1.8B	2025-12-31	2026-02-17	10-K	26-000016
15	assets	us-gaap:Assets	$14.6B	2024-12-31	2026-02-17	10-K	26-000016
16	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$6.9B	2024-12-31	2026-02-17	10-K	26-000016
17	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$4.5B	2024-12-31	2026-02-17	10-K	26-000016
18	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$6.6B	2023-12-31	2024-02-22	10-K	24-000009
19	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$4.2B	2023-12-31	2026-02-17	10-K	26-000016
20	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$6.2B	2022-12-31	2024-02-22	10-K	24-000009
21	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$4.0B	2022-12-31	2025-02-20	10-K	25-000012
22	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$5.5B	2021-12-31	2024-02-22	10-K	24-000009
23	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$3.6B	2021-12-31	2024-02-22	10-K	24-000009
24	current assets	us-gaap:AssetsCurrent	$3.0B	2025-12-31	2026-02-17	10-K	26-000016
25	current liabilities	us-gaap:LiabilitiesCurrent	$2.8B	2025-12-31	2026-02-17	10-K	26-000016
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$12.3B	2025-12-31	2026-02-17	10-K	26-000016
27	liabilities	us-gaap:Liabilities	$5.4B	2025-12-31	2026-02-17	10-K	26-000016
28	depreciation amortization	us-gaap:Depreciation	$145.5M	2025-12-31	2026-02-17	10-K	26-000016
29	operating income	us-gaap:OperatingIncomeLoss	$1.7B	2023-12-31	2026-02-17	10-K	26-000016
30	interest expense	us-gaap:InterestExpense	$81.8M	2023-12-31	2024-02-22	10-K	24-000009
31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$130.2M	2025-12-31	2026-02-17	10-K	26-000016

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32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$1.8B	2024-12-31	2026-02-17	10-K	26-000016
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$127.1M	2024-12-31	2026-02-17	10-K	26-000016
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$1.7B	2023-12-31	2026-02-17	10-K	26-000016
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$136.2M	2023-12-31	2026-02-17	10-K	26-000016
36	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$1.1B	2022-12-31	2025-02-20	10-K	25-000012
37	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$139.0M	2022-12-31	2025-02-20	10-K	25-000012
38	current assets	us-gaap:AssetsCurrent	$2.6B	2024-12-31	2026-02-17	10-K	26-000016
39	current liabilities	us-gaap:LiabilitiesCurrent	$2.1B	2024-12-31	2026-02-17	10-K	26-000016
40	assets	us-gaap:Assets	$15.0B	2023-12-31	2026-02-17	10-K	26-000016
41	assets	us-gaap:Assets	$12.4B	2022-12-31	2025-02-20	10-K	25-000012
42	shares outstanding	dei:EntityCommonStockSharesOutstanding	228,977,202	2026-01-30	2026-02-17	10-K	26-000016
43	shares outstanding	dei:EntityCommonStockSharesOutstanding	230,659,382	2025-01-31	2025-02-20	10-K	25-000012

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