Carlisle Companies Inc.

CSL

NYSE; manufacturing; SIC 3060, Fabricated Rubber Products, NEC; CIK 0000790051

B

second fifth of 255 graded peers in manufacturing

rank 68 of 255; percentile 26.4; sampling error 3.0 points; lower is stronger

A B C D E

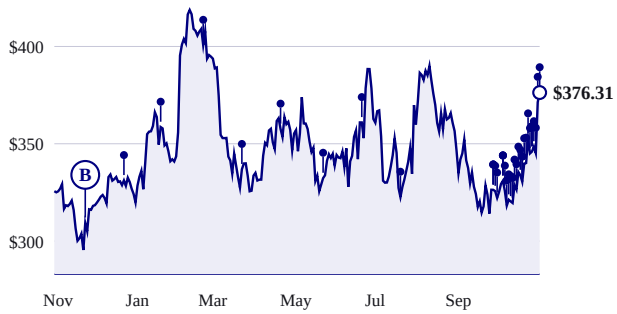
B, the elk



Scoreboard

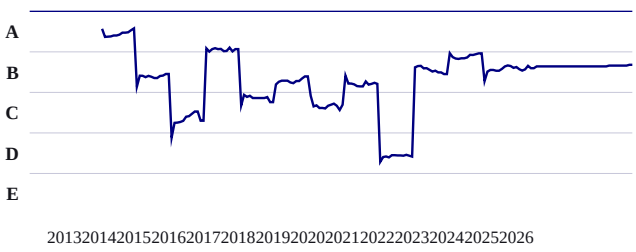
Profitability	B percentile 34.7
Solvency	B percentile 34.7
Growth and financing	C percentile 53.8
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $6.3B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress
Inputs computable	11 of 14
Graded from	filings received through Feb 13, 2026 260 days before the rescan; latest periodic filing 10-Q received Oct 29, 2026
Last close	$376.39 2026-10-30; market equity $14.5B; 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 13, 2026

. Business Strategy", we have a history and a strategy of acquiring businesses. We account for these business combinations as required by GAAP under the acquisition method of accounting, which requires us to recognize the assets acquired and the liabilities assumed at their acquisition date fair values. Deferred taxes are recorded for any differences between fair value and tax basis of assets acquired and liabilities assumed and can vary based on the structure of the acquisition as to whether it is a taxable or non-taxable transaction.

The fourteen inputs

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

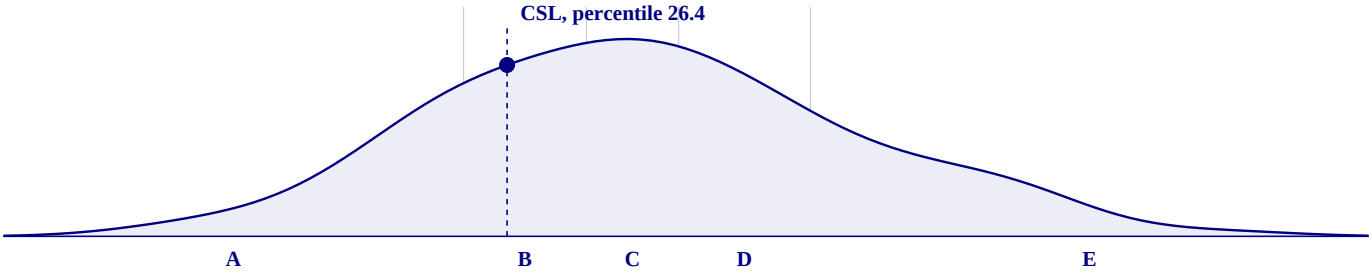
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 34.7						
Gross profitability	28.6%	21.9%		23.6	276	2025-12-31
Return on invested capital	21.9%	9.7%		12.9	102	2025-12-31
Accruals ratio	(6.0%)	(3.6%)		32.7	307	2025-12-31
Gross margin stability, five years	3.1 pts	2.1 pts		69.7	229	2025-12-31

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Solvency, sleeve percentile 34.7					
Twelve-month failure probability	not computable	0.04%			
liabilities and a nearby cover-page share count are required at 2026-09-30					
Altman Z double-prime	not computable	3.66			
one or more required annual facts are missing					
Net debt to EBITDA	1.48x	1.78x	40.0	121	2025-12-31
Interest coverage	not computable	5.09x			
one or more required annual facts are missing					
Current ratio	3.09x	2.25x	29.4	324	2025-12-31
Growth and financing, sleeve percentile 53.8					
Revenue growth, three-year compound	(2.7%)	2.2%	72.0	269	2025-12-31
Free cash flow growth, three-year compound	5.9%	13.5%	66.4	141	2025-12-31
Reinvestment rate	27.5%	26.1%	48.6	139	2025-12-31
Asset growth, three years	(4.6%)	4.3%	80.8	277	2025-12-31
Net share issuance, one year	(8.2%)	0.01%	1.2	241	2026-02-06

Among 255 peers

manufacturing; 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
63	Griffon Corp. (GFF)	24.4	B	
64	Tennant Co. (TNC)	24.8	B	
65	Armstrong World Industries Inc. (AWI)	25.2	B	
66	ATI Inc. (ATI)	25.6	B	
67	Xylem Inc. (XYL)	26.0	B	
68	Carlisle Companies Inc. (CSL)	26.4	B	
69	Zurn Elkay Water Solutions Corp. (ZWS)	26.8	B	
70	CRH Public Ltd. Co. (CRH)	27.2	B	
71	Janus International Group, Inc. (JBI)	27.6	B	
72	Mueller Industries Inc. (MLI)	28.0	B	fortress balance sheet
73	Powell Industries Inc. (POWL)	28.3	B	fortress balance sheet

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	6.7%	13.7%	43
Distance from 52-week high	(10.1%)	(26.2%)	81
EBIT to enterprise value	5.9%	4.2%	73
Free cash flow yield	6.7%	3.5%	81
Book value to price	0.10	0.36	9
Sales to price	0.35	0.53	29
Composite equity issuance, five years	(38.5%)	(9.6%)	5
Relative strength against the sector, log excess return	(0.07)	(0.00)	43

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Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 6 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	fail
Current ratio improved	pass
No new shares issued	pass
Gross margin improved	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$546.7M
Operating cash flow, four quarters	$897.2M
Months of runway	not finite
Days since last periodic filing	2 (10-Q received Oct 29, 2026)
Median daily dollar volume, 63 sessions	$150.8M

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...	$5.0B	2025-12-31	2026-02-13	10-K	26-000012
2	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$3.2B	2025-12-31	2026-02-13	10-K	26-000012
3	assets	us-gaap:Assets	$6.3B	2025-12-31	2026-02-13	10-K	26-000012
4	operating income	us-gaap:OperatingIncomeLoss	$1.0B	2025-12-31	2026-02-13	10-K	26-000012
5	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$948.8M	2025-12-31	2026-02-13	10-K	26-000012
6	income tax	us-gaap:IncomeTaxExpenseBenefit	$206.3M	2025-12-31	2026-02-13	10-K	26-000012
7	total debt	us-gaap:LongTermDebt	$2.9B	2025-12-31	2026-02-13	10-K	26-000012
8	book equity	us-gaap:StockholdersEquity	$1.8B	2025-12-31	2026-02-13	10-K	26-000012
9	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$1.1B	2025-12-31	2026-02-13	10-K	26-000012
10	total debt	us-gaap:LongTermDebt	$1.9B	2024-12-31	2026-02-13	10-K	26-000012
11	book equity	us-gaap:StockholdersEquity	$2.5B	2024-12-31	2026-02-13	10-K	26-000012
12	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$753.5M	2024-12-31	2026-02-13	10-K	26-000012
13	net income	us-gaap:NetIncomeLoss	$740.7M	2025-12-31	2026-02-13	10-K	26-000012
14	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$1.1B	2025-12-31	2026-02-13	10-K	26-000012
15	assets	us-gaap:Assets	$5.8B	2024-12-31	2026-02-13	10-K	26-000012
16	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$5.0B	2024-12-31	2026-02-13	10-K	26-000012
17	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$3.1B	2024-12-31	2026-02-13	10-K	26-000012
18	gross profit	us-gaap:GrossProfit	$1.6B	2023-12-31	2024-02-16	10-K	24-000058
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.6B	2023-12-31	2026-02-13	10-K	26-000012
20	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$5.4B	2022-12-31	2025-02-14	10-K	25-000077
21	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$3.6B	2022-12-31	2025-02-14	10-K	25-000077
22	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$3.8B	2021-12-31	2024-02-16	10-K	24-000058
23	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$2.7B	2021-12-31	2024-02-16	10-K	24-000058
24	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$196.5M	2025-12-31	2026-02-13	10-K	26-000012
25	current assets	us-gaap:AssetsCurrent	$2.3B	2025-12-31	2026-02-13	10-K	26-000012
26	current liabilities	us-gaap:LiabilitiesCurrent	$736.0M	2025-12-31	2026-02-13	10-K	26-000012
27	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$131.2M	2025-12-31	2026-02-13	10-K	26-000012
28	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$1.0B	2024-12-31	2026-02-13	10-K	26-000012
29	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$113.3M	2024-12-31	2026-02-13	10-K	26-000012
30	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$1.2B	2023-12-31	2026-02-13	10-K	26-000012
31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$142.2M	2023-12-31	2026-02-13	10-K	26-000012

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32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$1.0B	2022-12-31	2025-02-14	10-K	25-000077
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$183.5M	2022-12-31	2025-02-14	10-K	25-000077
34	current assets	us-gaap:AssetsCurrent	$1.9B	2024-12-31	2026-02-13	10-K	26-000012
35	current liabilities	us-gaap:LiabilitiesCurrent	$665.8M	2024-12-31	2026-02-13	10-K	26-000012
36	assets	us-gaap:Assets	$6.6B	2023-12-31	2025-02-14	10-K	25-000077
37	assets	us-gaap:Assets	$7.2B	2022-12-31	2024-02-16	10-K	24-000058
38	shares outstanding	dei:EntityCommonStockSharesOutstanding	40,883,868	2026-02-06	2026-02-13	10-K	26-000012
39	shares outstanding	dei:EntityCommonStockSharesOutstanding	44,558,131	2025-02-07	2025-02-14	10-K	25-000077

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