Innospec Inc.

IOSP

Nasdaq; chemicals; SIC 2800, Chemicals & Allied Products; CIK 0001054905

A

strongest fifth of 330 graded peers in the pooled industrial gr...

rank 45 of 330; percentile 14.6; sampling error 2.7 points; lower is stronger

A B C D E

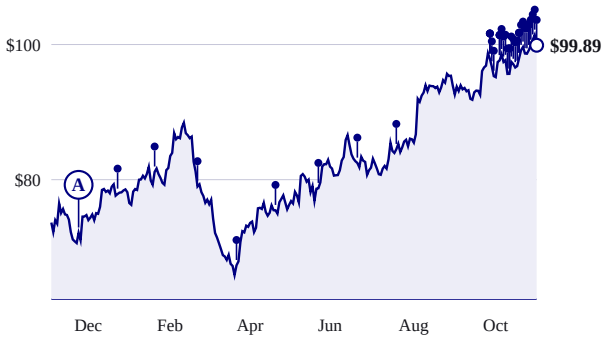
A, the bull



Scoreboard

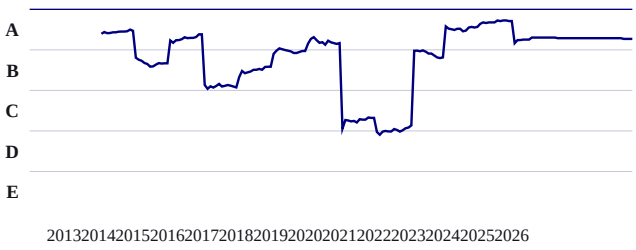
Profitability	B/C percentile 37.8
Solvency	B percentile 23.7
Growth and financing	C percentile 49.7
Reliability	0.91 AUC filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025
Peer failure rate	1.01% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$591M to $2.67B assets total assets $1.8B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered; fortress balance sheet not computable: distress
Inputs computable	8 of 14
Graded from	filings received through Feb 18, 2026 257 days before the rescan; latest periodic filing 10-Q received Aug 5, 2026
Last close	$99.98 2026-10-30; market equity $2.5B; 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 18, 2026

When we use the terms "Innospec," "the Corporation," "the Company," "Registrant," "we," "us" and "our," we are referring to Innospec Inc. and its consolidated subsidiaries unless otherwise indicated or the context otherwise requires. Innospec develops, manufactures, blends, markets and supplies a wide range of specialty chemicals to customers in the Americas, Europe, the Middle East, Africa and Asia-Pacific. Our Performance Chemicals business creates innovative technology-based solutions for the personal care, home care, agrochemical, construction, mining and other industrial markets.

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 37.8						
Gross profitability	26.9%	21.4%		28.2	359	2025-12-31
Return on invested capital	not computable	9.3%				

latest aligned inputs end 2020-12-31; latest annual assets end 2025-12-31

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Accruals ratio	(1.2%)	(4.2%)	74.8	398	2025-12-31
Gross margin stability, five years	0.9 pts	2.2 pts	10.4	300	2025-12-31
Solvency, sleeve percentile 23.7					
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	7.53	3.41	14.4	300	2025-12-31
Net debt to EBITDA	not computable	1.88x			
latest aligned inputs end 2020-12-31; latest annual assets end 2025-12-31					
Interest coverage	not computable	4.16x			
latest aligned inputs end 2014-12-31; latest annual assets end 2025-12-31					
Current ratio	2.79x	2.20x	33.1	421	2025-12-31
Growth and financing, sleeve percentile 49.7					
Revenue growth, three-year compound	(3.3%)	1.2%	70.1	349	2025-12-31
Free cash flow growth, three-year compound	not computable	12.5%			
latest aligned inputs end 2015-12-31; latest annual assets end 2025-12-31					
Reinvestment rate	not computable	21.8%			
latest aligned inputs end 2015-12-31; latest annual assets end 2025-12-31					
Asset growth, three years	4.5%	2.9%	43.0	366	2025-12-31
Net share issuance, one year	(0.7%)	0.0%	36.1	317	2026-01-31

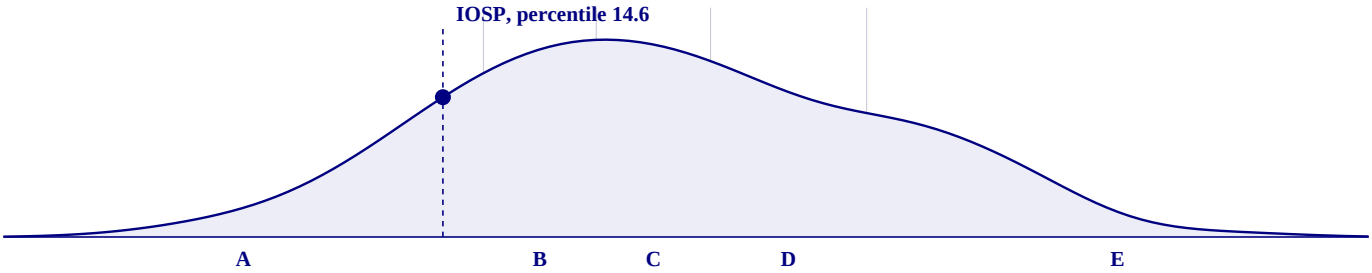
Warnings

1 of 7 checks triggered; none of them enters the letter

Check	Measured
Fortress balance sheet	cash minus debt is 105,300,000 USD; Altman Z is not used

Among 330 peers

chemicals; 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
40	Acme United Corp. (ACU)	13.4	A	
41	Weatherford International plc (WFRD)	13.8	A	
42	Newmarket Corp. (NEU)	14.0	A	
43	Park Aerospace Corp. (PKE)	14.2	A	late filer, fortress balance sheet
44	Kadant Inc. (KAI)	14.6	A	
45	Innospec Inc. (IOSP)	14.6	A	fortress balance sheet
46	Nwpx Infrastructure, Inc. (NWPX)	15.0	A	
47	Gencor Industries Inc. (GENC)	15.4	A	late filer, fortress balance sheet
48	Tecnoglass Holdings Inc. (TGLS)	15.7	A	
49	Movado Group Inc. (MOV)	16.1	A	
50	Kratos Defense & Security Solutions, Inc. (KTOS)	16.5	A	fortress balance sheet

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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	32.7%	11.0%	72
Distance from 52-week high	(1.5%)	(24.7%)	95
EBIT to enterprise value	5.9%	3.8%	73
Free cash flow yield	4.1%	3.4%	58
Book value to price	0.55	0.38	64
Sales to price	0.72	0.55	59
Composite equity issuance, five years	(8.2%)	(10.0%)	56
Relative strength against the sector, log excess return	0.14	0.00	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	pass
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	fail
Cash, filings, liquidity	
Cash and equivalents	$250.2M
Operating cash flow, four quarters	$124.3M
Months of runway	not finite
Days since last periodic filing	89 (10-Q received Aug 5, 2026)
Median daily dollar volume, 63 sessions	$17.7M

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	$492.4M	2025-12-31	2026-02-18	10-K	26-056502
2	assets	us-gaap:Assets	$1.8B	2025-12-31	2026-02-18	10-K	26-056502
3	operating income	us-gaap:OperatingIncomeLoss	$33.7M	2020-12-31	2023-02-22	10-K	23-044405
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$39.7M	2020-12-31	2023-02-22	10-K	23-044405
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$11.0M	2020-12-31	2023-02-22	10-K	23-044405
6	total debt	us-gaap:LongTermDebt	$0	2020-12-31	2021-02-17	10-K	21-046094
7	book equity	us-gaap:StockholdersEquity	$944.4M	2020-12-31	2022-02-16	10-K	22-044144
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$105.3M	2020-12-31	2022-02-16	10-K	22-044144
9	total debt	us-gaap:LongTermDebt	$58.6M	2019-12-31	2021-02-17	10-K	21-046094
10	book equity	us-gaap:StockholdersEquity	$918.5M	2019-12-31	2021-02-17	10-K	21-046094
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$75.7M	2019-12-31	2021-02-17	10-K	21-046094
12	net income	us-gaap:ProfitLoss	$116.6M	2025-12-31	2026-02-18	10-K	26-056502
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$138.3M	2025-12-31	2026-02-18	10-K	26-056502
14	assets	us-gaap:Assets	$1.7B	2024-12-31	2026-02-18	10-K	26-056502
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.8B	2025-12-31	2026-02-18	10-K	26-056502
16	gross profit	us-gaap:GrossProfit	$542.9M	2024-12-31	2026-02-18	10-K	26-056502
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.8B	2024-12-31	2026-02-18	10-K	26-056502
18	gross profit	us-gaap:GrossProfit	$591.1M	2023-12-31	2026-02-18	10-K	26-056502

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19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.9B	2023-12-31	2026-02-18	10-K	26-056502
20	gross profit	us-gaap:GrossProfit	$586.7M	2022-12-31	2025-02-19	10-K	25-022803
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$2.0B	2022-12-31	2025-02-19	10-K	25-022803
22	gross profit	us-gaap:GrossProfit	$434.9M	2021-12-31	2024-02-14	10-K	24-014960
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.5B	2021-12-31	2024-02-14	10-K	24-014960
24	current assets	us-gaap:AssetsCurrent	$1.0B	2025-12-31	2026-02-18	10-K	26-056502
25	current liabilities	us-gaap:LiabilitiesCurrent	$360.1M	2025-12-31	2026-02-18	10-K	26-056502
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$1.1B	2025-12-31	2026-02-18	10-K	26-056502
27	operating income	us-gaap:OperatingIncomeLoss	$129.5M	2025-12-31	2026-02-18	10-K	26-056502
28	book equity	us-gaap:StockholdersEquity	$1.3B	2025-12-31	2026-02-18	10-K	26-056502
29	liabilities	us-gaap:Liabilities	$499.5M	2025-12-31	2026-02-18	10-K	26-056502
30	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$46.0M	2020-12-31	2023-02-22	10-K	23-044405
31	operating income	us-gaap:OperatingIncomeLoss	$112.5M	2014-12-31	2017-02-15	10-K	17-045109
32	interest expense	us-gaap:InterestExpense	$3.8M	2014-12-31	2015-02-17	10-K	15-000732
33	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesC...	$118.2M	2015-12-31	2018-02-15	10-K	18-047390
34	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$17.6M	2015-12-31	2016-02-17	10-K	16-466575
35	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesC...	$106.3M	2014-12-31	2017-02-15	10-K	17-045109
36	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$13.5M	2014-12-31	2016-02-17	10-K	16-466575
37	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$61.3M	2013-12-31	2014-02-13	10-K	14-050831
38	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$11.0M	2013-12-31	2016-02-17	10-K	16-466575
39	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$61.3M	2012-12-31	2014-02-13	10-K	14-050831
40	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$8.6M	2012-12-31	2015-02-17	10-K	15-000732
41	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$35.2M	2015-12-31	2018-02-15	10-K	18-047390
42	operating income	us-gaap:OperatingIncomeLoss	$156.3M	2015-12-31	2018-02-15	10-K	18-047390
43	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$152.3M	2015-12-31	2018-02-15	10-K	18-047390
44	income tax	us-gaap:IncomeTaxExpenseBenefit	$32.8M	2015-12-31	2018-02-15	10-K	18-047390
45	current assets	us-gaap:AssetsCurrent	$458.7M	2015-12-31	2017-02-15	10-K	17-045109
46	current liabilities	us-gaap:LiabilitiesCurrent	$206.1M	2015-12-31	2017-02-15	10-K	17-045109
47	current assets	us-gaap:AssetsCurrent	$414.2M	2014-12-31	2016-02-17	10-K	16-466575
48	current liabilities	us-gaap:LiabilitiesCurrent	$222.9M	2014-12-31	2016-02-17	10-K	16-466575
49	assets	us-gaap:Assets	$1.7B	2023-12-31	2025-02-19	10-K	25-022803
50	assets	us-gaap:Assets	$1.6B	2022-12-31	2025-02-19	10-K	25-022803
51	shares outstanding	dei:EntityCommonStockSharesOutstanding	24,777,859	2026-01-31	2026-02-18	10-K	26-056502
52	shares outstanding	dei:EntityCommonStockSharesOutstanding	24,959,659	2025-01-31	2025-02-19	10-K	25-022803

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