# Entegris Inc.

**ENTG**

Nasdaq; manufacturing; SIC 3089, Plastics Products, NEC; CIK 0001101302

**D**

**fourth fifth of 255 graded peers in manufacturing**

rank 192 of 255; percentile 75.2; sampling error 3.0 points; lower is stronger

A B C D E

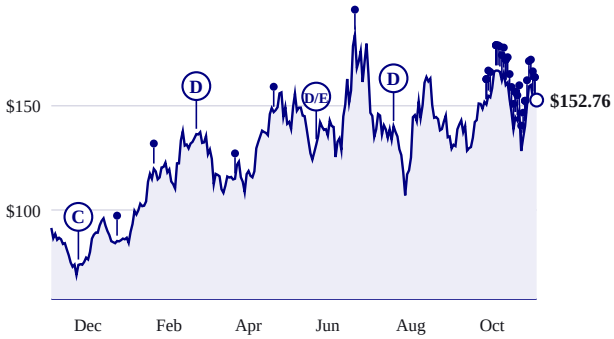
**D, the sloth**



## Scoreboard

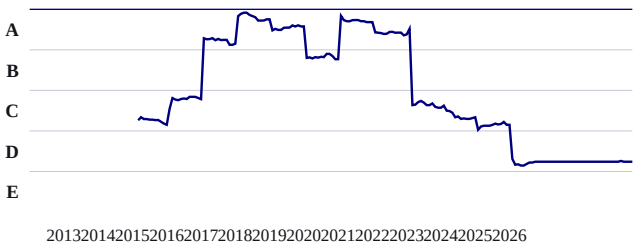
| | |
|---|---|
| **Profitability** | C<br>percentile 50.4 |
| **Solvency** | C<br>percentile 56.5 |
| **Growth and financing** | D<br>percentile 64.5 |
| **Reliability** | 0.94 AUC<br>filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025 |
| **Peer failure rate** | 0.52% a year<br>Item 1.03 bankruptcies, same asset band, 2012 to 2025 |
| **Size band** | over $2.67B assets<br>total assets $8.4B |
| **Standard universe** | inside<br>revenue above $1M and assets above $10M |
| **Warnings** | none triggered<br>not computable: distress |
| **Inputs computable** | 10 of 14 |
| **Graded from** | filings received through Feb 11, 2026<br>266 days before the rescan; latest periodic filing 10-Q received Oct 29, 2026 |
| **Last close** | $152.79<br>2026-11-03; market equity $23.3B; 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 11, 2026*

Entegris, Inc. ("Entegris", "the Company", "us", "we", or "our") is a leading supplier of critical advanced materials and process solutions for the semiconductor and other high-technology industries. We leverage our unique breadth of capabilities to provide customers with innovative, science-based solutions to their toughest technology challenges, helping improve productivity and product performance in the most advanced manufacturing environments. Semiconductors, or integrated circuits, are key components in electronic devices that continue to transform how we live, communicate and work.

## The fourteen inputs

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

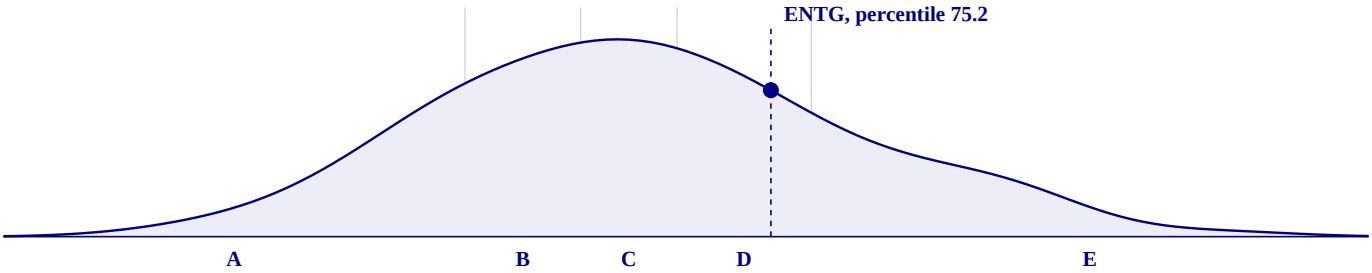
| Input | Value | Peer median | Percentile, 0 to 100 | Pct | Peers | Period end |
|---|---|---|---|---|---|---|
| **Profitability, sleeve percentile 50.4** | | | | | | |
| Gross profitability | 17.0% | 21.9% | | 66.1 | 275 | 2025-12-31 |
| Return on invested capital | 5.8% | 9.7% | | 71.0 | 101 | 2025-12-31 |
| Accruals ratio | (5.5%) | (3.6%) | | 36.1 | 306 | 2025-12-31 |

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| | | | | | | |
|---|---|---|---|---|---|---|
| Gross margin stability, five years | 1.6 pts | 2.1 pts | | 28.5 | 229 | 2025-12-31 |
| **Solvency, sleeve percentile 56.5** | | | | | | |
| Twelve-month failure probability | not computable | 0.04% | | | | |
| *liabilities and a nearby cover-page share count are required at 2026-09-26* | | | | | | |
| Altman Z double-prime | not computable | 3.66 | | | | |
| *one or more required annual facts are missing* | | | | | | |
| Net debt to EBITDA | 5.05x | 1.78x | | 89.2 | 121 | 2025-12-31 |
| Interest coverage | not computable | 5.09x | | | | |
| *latest aligned inputs end 2024-12-31; latest annual assets end 2025-12-31* | | | | | | |
| Current ratio | 3.35x | 2.25x | | 23.9 | 323 | 2025-12-31 |
| **Growth and financing, sleeve percentile 64.5** | | | | | | |
| Revenue growth, three-year compound | (0.9%) | 2.2% | | 65.3 | 269 | 2025-12-31 |
| Free cash flow growth, three-year compound | not computable | 13.5% | | | | |
| *current FCF must be positive and base FCF must exceed $100,000* | | | | | | |
| Reinvestment rate | 36.0% | 26.1% | | 39.9 | 139 | 2025-12-31 |
| Asset growth, three years | (6.3%) | 4.3% | | 83.3 | 277 | 2025-12-31 |
| Net share issuance, one year | 0.6% | 0.01% | | 69.6 | 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 |
|---|---|---|---|---|
| 187 | Trimas Corp. (TRS) | 73.2 | D | |
| 188 | Loar Holdings Inc. (LOAR) | 73.6 | D | |
| 189 | Nike, Inc. (NKE) | 74.0 | D | |
| 190 | Columbus Mckinnon Corp. (CMCO) | 74.4 | D | |
| 191 | Illinois Tool Works Inc. (ITW) | 74.8 | D | |
| 192 | Entegris Inc. (ENTG) | 75.2 | D | |
| 193 | Crown Holdings, Inc. (CCK) | 75.6 | D | |
| 194 | Johnson Controls International plc (JCI) | 76.0 | D | |
| 195 | Brunswick Corp. (BC) | 76.6 | D | |
| 196 | Brunswick Corp. (BC-PC) | 76.6 | D | |
| 197 | Avery Dennison Corp. (AVY) | 77.2 | D/E | |

## What the price implies

*at the 2026-11-03 close; none of these enters the grade*

| Measure | Value | Peer median | Percentile |
|---|---|---|---|
| Twelve-month price change, skipping the latest month | 68.6% | 9.8% | 86 |
| Distance from 52-week high | (17.0%) | (23.8%) | 65 |
| EBIT to enterprise value | 1.7% | 4.1% | 28 |
| Free cash flow yield | 1.7% | 3.4% | 32 |
| Book value to price | 0.19 | 0.36 | 21 |
| Sales to price | 0.14 | 0.53 | 8 |

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| | | | |
|---|---|---|---|
| Composite equity issuance, five years | 10.4% | (9.6%) | 76 |
| Relative strength against the sector, log excess return | 0.44 | 0.01 | 86 |

## 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 | pass |
| Current ratio improved | pass |
| No new shares issued | fail |
| Gross margin improved | fail |
| Asset turnover improved | pass |
| **Cash, filings, liquidity** | |
| Cash and equivalents | $356.5M |
| Operating cash flow, four quarters | $798.0M |
| Months of runway | not finite |
| Days since last periodic filing | 6 (10-Q received Oct 29, 2026) |
| Median daily dollar volume, 63 sessions | $306.8M |

## 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 | gross profit | us-gaap:GrossProfit | $1.4B | 2025-12-31 | 2026-02-11 | 10-K | 26-000012 |
| 2 | assets | us-gaap:Assets | $8.4B | 2025-12-31 | 2026-02-11 | 10-K | 26-000012 |
| 3 | operating income | us-gaap:OperatingIncomeLoss | $455.9M | 2025-12-31 | 2026-02-11 | 10-K | 26-000012 |
| 4 | pretax income | us-gaap:IncomeLossFromContinuingOperationsBeforeInc... | $254.6M | 2025-12-31 | 2026-02-11 | 10-K | 26-000012 |
| 5 | income tax | us-gaap:IncomeTaxExpenseBenefit | $18.0M | 2025-12-31 | 2026-02-11 | 10-K | 26-000012 |
| 6 | total debt | us-gaap:LongTermDebt | $3.7B | 2025-12-31 | 2026-02-11 | 10-K | 26-000012 |
| 7 | book equity | us-gaap:StockholdersEquityIncludingPortionAttributableT... | $4.0B | 2025-12-31 | 2026-02-11 | 10-K | 26-000012 |
| 8 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $360.4M | 2025-12-31 | 2026-02-11 | 10-K | 26-000012 |
| 9 | total debt | us-gaap:LongTermDebt | $4.0B | 2024-12-31 | 2026-02-11 | 10-K | 26-000012 |
| 10 | book equity | us-gaap:StockholdersEquityIncludingPortionAttributableT... | $3.7B | 2024-12-31 | 2026-02-11 | 10-K | 26-000012 |
| 11 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $329.2M | 2024-12-31 | 2026-02-11 | 10-K | 26-000012 |
| 12 | net income | us-gaap:NetIncomeLoss | $235.6M | 2025-12-31 | 2026-02-11 | 10-K | 26-000012 |
| 13 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $695.4M | 2025-12-31 | 2026-02-11 | 10-K | 26-000012 |
| 14 | assets | us-gaap:Assets | $8.4B | 2024-12-31 | 2026-02-11 | 10-K | 26-000012 |
| 15 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $3.2B | 2025-12-31 | 2026-02-11 | 10-K | 26-000012 |
| 16 | gross profit | us-gaap:GrossProfit | $1.5B | 2024-12-31 | 2026-02-11 | 10-K | 26-000012 |
| 17 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $3.2B | 2024-12-31 | 2026-02-11 | 10-K | 26-000012 |
| 18 | gross profit | us-gaap:GrossProfit | $1.5B | 2023-12-31 | 2026-02-11 | 10-K | 26-000012 |
| 19 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $3.5B | 2023-12-31 | 2026-02-11 | 10-K | 26-000012 |
| 20 | gross profit | us-gaap:GrossProfit | $1.4B | 2022-12-31 | 2025-02-12 | 10-K | 25-000015 |
| 21 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $3.3B | 2022-12-31 | 2025-02-12 | 10-K | 25-000015 |
| 22 | gross profit | us-gaap:GrossProfit | $1.1B | 2021-12-31 | 2024-02-15 | 10-K | 24-000009 |
| 23 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $2.3B | 2021-12-31 | 2024-02-15 | 10-K | 24-000009 |
| 24 | depreciation amortization | us-gaap:DepreciationDepletionAndAmortization | $205.3M | 2025-12-31 | 2026-02-11 | 10-K | 26-000012 |
| 25 | operating income | us-gaap:OperatingIncomeLoss | $533.9M | 2024-12-31 | 2026-02-11 | 10-K | 26-000012 |
| 26 | interest expense | us-gaap:InterestExpense | $215.2M | 2024-12-31 | 2025-02-12 | 10-K | 25-000015 |
| 27 | current assets | us-gaap:AssetsCurrent | $1.6B | 2025-12-31 | 2026-02-11 | 10-K | 26-000012 |
| 28 | current liabilities | us-gaap:LiabilitiesCurrent | $488.6M | 2025-12-31 | 2026-02-11 | 10-K | 26-000012 |
| 29 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $299.2M | 2025-12-31 | 2026-02-11 | 10-K | 26-000012 |

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| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| 30 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $631.7M | 2024-12-31 | 2026-02-11 | 10-K | 26-000012 |
| 31 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $315.6M | 2024-12-31 | 2026-02-11 | 10-K | 26-000012 |
| 32 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $644.5M | 2023-12-31 | 2026-02-11 | 10-K | 26-000012 |
| 33 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $456.8M | 2023-12-31 | 2026-02-11 | 10-K | 26-000012 |
| 34 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $363.1M | 2022-12-31 | 2025-02-12 | 10-K | 25-000015 |
| 35 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $466.2M | 2022-12-31 | 2025-02-12 | 10-K | 25-000015 |
| 36 | current assets | us-gaap:AssetsCurrent | $1.6B | 2024-12-31 | 2026-02-11 | 10-K | 26-000012 |
| 37 | current liabilities | us-gaap:LiabilitiesCurrent | $525.2M | 2024-12-31 | 2026-02-11 | 10-K | 26-000012 |
| 38 | assets | us-gaap:Assets | $8.8B | 2023-12-31 | 2025-02-12 | 10-K | 25-000015 |
| 39 | assets | us-gaap:Assets | $10.1B | 2022-12-31 | 2024-02-15 | 10-K | 24-000009 |
| 40 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 152,000,000 | 2026-02-06 | 2026-02-11 | 10-K | 26-000012 |
| 41 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 151,126,743 | 2025-02-05 | 2025-02-12 | 10-K | 25-000015 |

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