Vontier Corp. VNT

NYSE; business equipment; SIC 3824, Totalizing Fluid Meters & Counting Devices; CIK 0001786842

E

weakest fifth of 497 graded peers in business equipment

rank 415 of 497; percentile 83.5; sampling error 2.2 points; lower is stronger

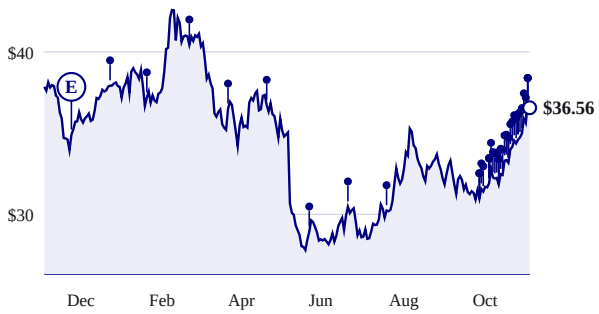
A B C D E

E, the bear



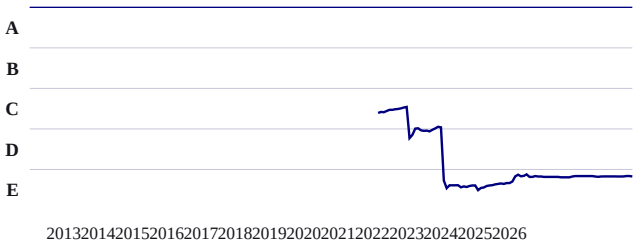
Scoreboard	
Profitability	D percentile 77.6
Solvency	C percentile 55.1
Growth and financing	C percentile 52.2
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $4.4B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress
Inputs computable	8 of 14
Graded from	filings received through Feb 12, 2026 265 days before the rescan; latest periodic filing 10-Q received Aug 6, 2026
Last close	$36.58 2026-11-03; market equity $4.9B; 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 12, 2026

- General" included in this Annual Report for a discussion of our strategies for delivering long-term shareholder value. We operate through three reportable segments which align to our three operating segments: (i) Mobility Technologies, which provides digitally enabled equipment and solutions to support efficient operations across the mobility ecosystem, including point-of-sale and payment systems, workflow automation solutions, telematics, data analytics, software platform for electric vehicle charging networks, and integrated solutions for alternative fuel dispensing; (ii) Repair Solutions, which manufactures and distributes aftermarket vehicle repair tools, toolboxes, automotive diagn...

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 77.6						
Gross profitability	not computable	28.7%				

latest aligned inputs end 2022-12-31; latest annual assets end 2025-12-31

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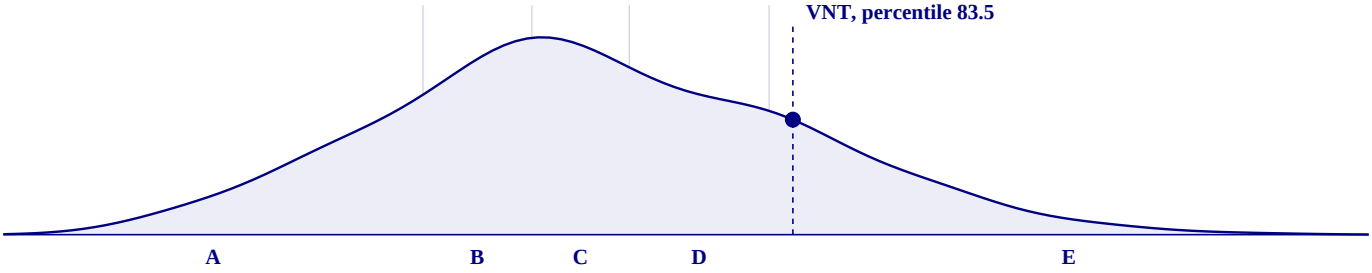
Return on invested capital	not computable	11.6%				
latest aligned inputs end 2022-12-31; latest annual assets end 2025-12-31						
Accruals ratio	(2.4%)	(7.4%)		77.6	618	2025-12-31
Gross margin stability, five years	not computable	2.3 pts				
five annual gross margins are required; found 3						
Solvency, sleeve percentile 55.1						
Twelve-month failure probability	not computable	0.06%				
latest liabilities, cash plus short-term investments, book equity, and shares are required						
Altman Z double-prime	3.03	2.16		36.4	564	2025-12-31
Net debt to EBITDA	not computable	1.08x				
latest aligned inputs end 2022-12-31; latest annual assets end 2025-12-31						
Interest coverage	not computable	3.77x				
one or more required annual facts are missing						
Current ratio	1.16x	2.01x		73.8	662	2025-12-31
Growth and financing, sleeve percentile 52.2						
Revenue growth, three-year compound	(1.2%)	6.4%		71.6	536	2025-12-31
Free cash flow growth, three-year compound	19.1%	18.2%		48.1	265	2025-12-31
Reinvestment rate	(53.2%)	14.3%		70.9	224	2025-12-31
Asset growth, three years	0.2%	5.1%		61.8	561	2025-12-31
Net share issuance, one year	(4.8%)	0.5%		8.6	408	2026-02-09

Among 497 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
410	NCR Atleos Corp. (NATL)	82.5	E	
411	Ribbon Communications Inc. (RBBN)	82.7	E	
412	Microvision, Inc. (MVIS)	82.9	E	short runway, fortress balance sheet
413	Healthstream Inc. (HSTM)	83.1	E	
414	SCWorx Corp. (WORX)	83.3	E	dilution
415	Vontier Corp. (VNT)	83.5	E	
416	Marqeta, Inc. (MQ)	83.7	E	
417	Vistance Networks, Inc. (VISN)	83.9	E	
418	Neonode Inc. (NEON)	84.1	E	
419	Methode Electronics Inc. (MEI)	84.3	E	
420	Magnite, Inc. (MGNI)	84.5	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	(18.3%)	(2.0%)	36
Distance from 52-week high	(14.1%)	(32.7%)	76
EBIT to enterprise value	8.0%	1.6%	90

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Free cash flow yield	8.9%	2.8%	84
Book value to price	0.24	0.27	47
Sales to price	0.62	0.31	68
Composite equity issuance, five years	(23.7%)	4.2%	8
Relative strength against the sector, log excess return	(0.47)	(0.29)	36

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	fail
Operating cash flow exceeds net income	pass
Long-term leverage fell	pass
Current ratio improved	fail
No new shares issued	pass
Gross margin improved	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$265.8M
Operating cash flow, four quarters	$463.4M
Months of runway	not finite
Days since last periodic filing	90 (10-Q received Aug 6, 2026)
Median daily dollar volume, 63 sessions	$41.4M

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	2022-12-31	2023-02-17	10-K	23-000011
2	assets	us-gaap:Assets	$4.3B	2022-12-31	2024-02-15	10-K	24-000015
3	operating income	us-gaap:OperatingIncomeLoss	$577.9M	2022-12-31	2025-02-13	10-K	25-000008
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$527.4M	2022-12-31	2025-02-13	10-K	25-000008
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$126.1M	2022-12-31	2025-02-13	10-K	25-000008
6	total debt	us-gaap:LongTermDebt	$2.6B	2022-12-31	2023-02-17	10-K	23-000011
7	book equity	us-gaap:StockholdersEquity	$576.5M	2022-12-31	2024-02-15	10-K	24-000015
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$204.5M	2022-12-31	2024-02-15	10-K	24-000015
9	total debt	us-gaap:LongTermDebt	$2.6B	2021-12-31	2023-02-17	10-K	23-000011
10	book equity	us-gaap:StockholdersEquity	$569.9M	2021-12-31	2023-02-17	10-K	23-000011
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$572.6M	2021-12-31	2023-02-17	10-K	23-000011
12	net income	us-gaap:ProfitLoss	$406.1M	2025-12-31	2026-02-12	10-K	26-007648
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$511.0M	2025-12-31	2026-02-12	10-K	26-007648
14	assets	us-gaap:Assets	$4.4B	2025-12-31	2026-02-12	10-K	26-007648
15	assets	us-gaap:Assets	$4.3B	2024-12-31	2026-02-12	10-K	26-007648
16	current assets	us-gaap:AssetsCurrent	$1.5B	2025-12-31	2026-02-12	10-K	26-007648
17	current liabilities	us-gaap:LiabilitiesCurrent	$1.3B	2025-12-31	2026-02-12	10-K	26-007648
18	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$1.9B	2025-12-31	2026-02-12	10-K	26-007648
19	operating income	us-gaap:OperatingIncomeLoss	$561.6M	2025-12-31	2026-02-12	10-K	26-007648
20	book equity	us-gaap:StockholdersEquity	$1.2B	2025-12-31	2026-02-12	10-K	26-007648
21	liabilities	us-gaap:Liabilities	$3.1B	2025-12-31	2026-02-12	10-K	26-007648
22	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$40.9M	2022-12-31	2025-02-13	10-K	25-000008
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$3.1B	2025-12-31	2026-02-12	10-K	26-007648
24	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$3.0B	2024-12-31	2026-02-12	10-K	26-007648
25	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$3.1B	2023-12-31	2026-02-12	10-K	26-007648

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26	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$3.2B	2022-12-31	2025-02-13	10-K	25-000008
27	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$69.9M	2025-12-31	2026-02-12	10-K	26-007648
28	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$427.5M	2024-12-31	2026-02-12	10-K	26-007648
29	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$82.7M	2024-12-31	2026-02-12	10-K	26-007648
30	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$455.0M	2023-12-31	2026-02-12	10-K	26-007648
31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$60.1M	2023-12-31	2026-02-12	10-K	26-007648
32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$321.2M	2022-12-31	2025-02-13	10-K	25-000008
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$60.0M	2022-12-31	2025-02-13	10-K	25-000008
34	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$51.1M	2025-12-31	2026-02-12	10-K	26-007648
35	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$508.2M	2025-12-31	2026-02-12	10-K	26-007648
36	income tax	us-gaap:IncomeTaxExpenseBenefit	$102.1M	2025-12-31	2026-02-12	10-K	26-007648
37	current assets	us-gaap:AssetsCurrent	$1.4B	2024-12-31	2026-02-12	10-K	26-007648
38	current liabilities	us-gaap:LiabilitiesCurrent	$909.2M	2024-12-31	2026-02-12	10-K	26-007648
39	assets	us-gaap:Assets	$4.3B	2023-12-31	2025-02-13	10-K	25-000008
40	shares outstanding	dei:EntityCommonStockSharesOutstanding	141,600,000	2026-02-09	2026-02-12	10-K	26-007648
41	shares outstanding	dei:EntityCommonStockSharesOutstanding	148,700,000	2025-02-10	2025-02-13	10-K	25-000008

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