# 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**



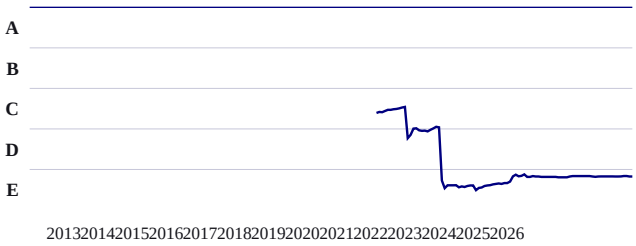
| Scoreboard | |
|---|---|
| **Profitability** | D<br>percentile 77.6 |
| **Solvency** | C<br>percentile 55.0 |
| **Growth and financing** | C<br>percentile 52.0 |
| **Reliability** | 0.94 AUC<br>filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025 |
| **Peer failure rate** | 0.52% a year<br>Item 1.03 bankruptcies, same asset band, 2012 to 2025 |
| **Size band** | over $2.67B assets<br>total assets $4.4B |
| **Standard universe** | inside<br>revenue above $1M and assets above $10M |
| **Warnings** | none triggered<br>not computable: distress |
| **Inputs computable** | 8 of 14 |
| **Graded from** | filings received through Feb 12, 2026<br>266 days before the rescan; latest periodic filing 10-Q received Aug 6, 2026 |
| **Last close** | $37.58<br>2026-11-04; market equity $5.1B; 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 | 28.6% | | | | |

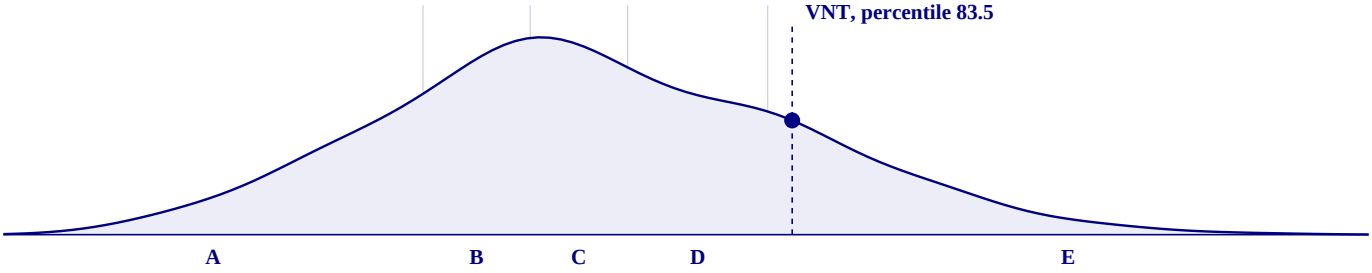
*latest aligned inputs end 2022-12-31; latest annual assets end 2025-12-31*

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| | | | | | | |
|---|---|---|---|---|---|---|
| Return on invested capital | not computable | 11.2% | | | | |
| *latest aligned inputs end 2022-12-31; latest annual assets end 2025-12-31* | | | | | | |
| Accruals ratio | (2.4%) | (7.3%) | 77.6 | 617 | 2025-12-31 | |
| Gross margin stability, five years | not computable | 2.3 pts | | | | |
| *five annual gross margins are required; found 3* | | | | | | |
| **Solvency, sleeve percentile 55.0** | | | | | | |
| 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 | 3.03 | 2.16 | 36.2 | 564 | 2025-12-31 | |
| Net debt to EBITDA | not computable | 1.09x | | | | |
| *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 52.0** | | | | | | |
| Revenue growth, three-year compound | (1.2%) | 6.4% | 71.5 | 534 | 2025-12-31 | |
| Free cash flow growth, three-year compound | 19.1% | 17.7% | 47.5 | 264 | 2025-12-31 | |
| Reinvestment rate | (53.2%) | 13.3% | 70.6 | 222 | 2025-12-31 | |
| Asset growth, three years | 0.2% | 5.1% | 61.8 | 559 | 2025-12-31 | |
| Net share issuance, one year | (4.8%) | 0.5% | 8.6 | 409 | 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 | Healthstream Inc. (HSTM) | 82.9 | E | |
| 413 | Microvision, Inc. (MVIS) | 83.1 | E | short runway, fortress balance sheet |
| 414 | SCWorx Corp. (WORX) | 83.3 | E | dilution |
| 415 | Vontier Corp. (VNT) | 83.5 | E | |
| 416 | Marqeta, Inc. (MQ) | 83.7 | E | |
| 417 | Neonode Inc. (NEON) | 83.9 | E | |
| 418 | Vistance Networks, Inc. (VISN) | 84.1 | E | |
| 419 | Methode Electronics Inc. (MEI) | 84.3 | E | |
| 420 | Magnite, Inc. (MGNI) | 84.5 | E | |

## What the price implies

*at the 2026-11-04 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 | (11.7%) | (33.1%) | 76 |
| EBIT to enterprise value | 7.8% | 1.7% | 90 |

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| | | | |
|---|---|---|---|
| Free cash flow yield | 8.7% | 2.8% | 83 |
| Book value to price | 0.23 | 0.28 | 46 |
| Sales to price | 0.61 | 0.31 | 67 |
| 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 | 91 (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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