Huntington Ingalls Industries, Inc. HII

NYSE; manufacturing; SIC 3730, Ship & Boat Building & Repairing; CIK 0001501585

C

middle fifth of 255 graded peers in manufacturing

rank 117 of 255; percentile 45.7; sampling error 3.0 points; lower is stronger

A B C D E

C, the tortoise



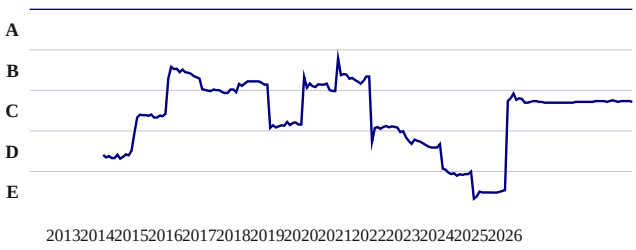
Scoreboard	
Profitability	B/C percentile 42.0
Solvency	C/D percentile 58.4
Growth and financing	C percentile 43.1
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $12.7B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: short runway, distress
Inputs computable	9 of 14
Graded from	filings received through Feb 5, 2026 274 days before the rescan; latest periodic filing 10-Q received Oct 29, 2026
Last close	$289.54 2026-11-05; market equity $11.4B; 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 5, 2026

Huntington Ingalls Industries, Inc. ("HII", the "Company", "we", "us", or "our") is a global, all-domain defense partner, building and delivering the world's most powerful, survivable naval ships and technologies that safeguard America's seas, sky, land, space, and cyber. For more than a century, our Ingalls Shipbuilding segment ("Ingalls") in Mississippi and Newport News Shipbuilding segment ("Newport News") in Virginia have built more ships in more ship classes than any other U.S. naval shipbuilder, making us America's largest shipbuilder. Our Mission Technologies segment develops integrated technology solutions and products that enable today's connected, all-domain force.

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 42.0						
Gross profitability	not computable	21.9%				
one or more required annual facts are missing						

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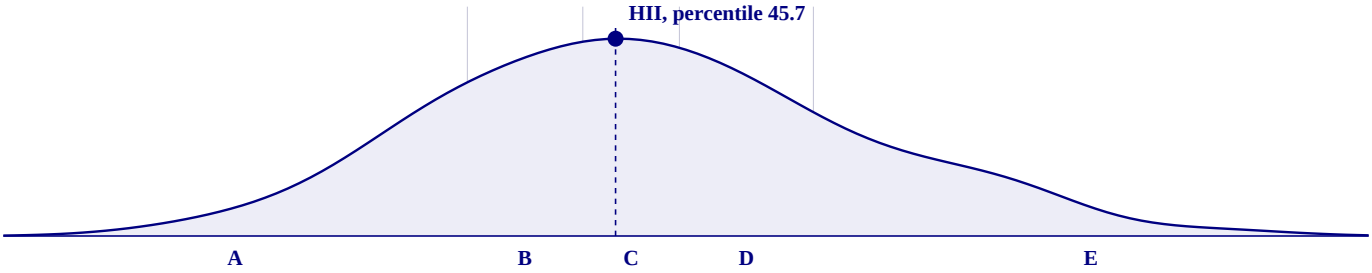
Return on invested capital	not computable	9.7%				
latest aligned inputs end 2021-12-31; latest annual assets end 2025-12-31						
Accruals ratio	(4.7%)	(3.6%)	42.0	306	2025-12-31	
Gross margin stability, five years	not computable	2.1 pts				
five annual gross margins are required; found 0						
Solvency, sleeve percentile 58.4						
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	2.65	3.66	52.3	242	2025-12-31	
Net debt to EBITDA	not computable	1.78x				
latest aligned inputs end 2021-12-31; latest annual assets end 2025-12-31						
Interest coverage	6.26x	5.09x	35.5	63	2025-12-31	
Current ratio	1.13x	2.25x	87.6	323	2025-12-31	
Growth and financing, sleeve percentile 43.1						
Revenue growth, three-year compound	5.4%	2.2%	33.2	269	2025-12-31	
Free cash flow growth, three-year compound	18.1%	13.5%	45.0	141	2025-12-31	
Reinvestment rate	47.3%	26.1%	35.5	139	2025-12-31	
Asset growth, three years	5.5%	4.3%	42.4	277	2025-12-31	
Net share issuance, one year	0.3%	0.01%	59.2	241	2026-01-30	

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
112	Belden Inc. (BDC)	43.7	C	
113	Packaging Corp. OF America (PKG)	44.1	C	dilution
114	Apogee Enterprises, Inc. (APOG)	44.5	C	
115	Terex Corp. (TEX)	44.9	C	dilution
116	Serve Robotics Inc. (SERV)	45.3	C	dilution, short runway
117	Huntington Ingalls Industries, Inc. (HII)	45.7	C	
118	Dnow Inc. (DNOW)	46.1	C	dilution
119	HNI Corp. (HNI)	46.5	C	dilution
120	Fuel Tech, Inc. (FTEK)	46.9	C	
121	Ceco Environmental Corp. (CECO)	47.2	C	
122	Zebra Technologies Corp. (ZBRA)	47.6	C	

What the price implies

at the 2026-11-05 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(16.1%)	9.8%	23
Distance from 52-week high	(36.2%)	(28.3%)	37
EBIT to enterprise value	4.7%	4.3%	55
Free cash flow yield	7.0%	3.6%	83

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Book value to price	0.48	0.38	62
Sales to price	1.09	0.56	70
Composite equity issuance, five years	(14.3%)	(9.6%)	36
Relative strength against the sector, log excess return	(0.26)	0.01	23

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	pass
Current ratio improved	pass
No new shares issued	fail
Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	n/a
Operating cash flow, four quarters	n/a
Months of runway	not finite
Days since last periodic filing	8 (10-Q received Oct 29, 2026)
Median daily dollar volume, 63 sessions	$129.1M

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	operating income	us-gaap:OperatingIncomeLoss	$513.0M	2021-12-31	2024-02-01	10-K	24-000007
2	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$622.0M	2021-12-31	2024-02-01	10-K	24-000007
3	income tax	us-gaap:IncomeTaxExpenseBenefit	$78.0M	2021-12-31	2024-02-01	10-K	24-000007
4	total debt	us-gaap:LongTermDebt	$3.3B	2021-12-31	2023-02-09	10-K	23-000010
5	book equity	us-gaap:StockholdersEquity	$2.8B	2021-12-31	2025-02-06	10-K	25-000006
6	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$627.0M	2021-12-31	2022-02-10	10-K	22-000007
7	total debt	us-gaap:LongTermDebt	$1.7B	2020-12-31	2022-02-10	10-K	22-000007
8	book equity	us-gaap:StockholdersEquity	$1.9B	2020-12-31	2024-02-01	10-K	24-000007
9	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$512.0M	2020-12-31	2022-02-10	10-K	22-000007
10	net income	us-gaap:NetIncomeLoss	$605.0M	2025-12-31	2026-02-05	10-K	26-000006
11	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$1.2B	2025-12-31	2026-02-05	10-K	26-000006
12	assets	us-gaap:Assets	$12.7B	2025-12-31	2026-02-05	10-K	26-000006
13	assets	us-gaap:Assets	$12.1B	2024-12-31	2026-02-05	10-K	26-000006
14	current assets	us-gaap:AssetsCurrent	$3.5B	2025-12-31	2026-02-05	10-K	26-000006
15	current liabilities	us-gaap:LiabilitiesCurrent	$3.0B	2025-12-31	2026-02-05	10-K	26-000006
16	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$5.5B	2025-12-31	2026-02-05	10-K	26-000006
17	operating income	us-gaap:OperatingIncomeLoss	$657.0M	2025-12-31	2026-02-05	10-K	26-000006
18	book equity	us-gaap:StockholdersEquity	$5.1B	2025-12-31	2026-02-05	10-K	26-000006
19	liabilities	us-gaap:Liabilities	$7.7B	2025-12-31	2026-02-05	10-K	26-000006
20	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$293.0M	2021-12-31	2024-02-01	10-K	24-000007
21	interest expense	us-gaap:InterestExpense	$105.0M	2025-12-31	2026-02-05	10-K	26-000006
22	revenue	us-gaap:Revenues	$12.5B	2025-12-31	2026-02-05	10-K	26-000006
23	revenue	us-gaap:Revenues	$11.5B	2024-12-31	2026-02-05	10-K	26-000006
24	revenue	us-gaap:Revenues	$11.5B	2023-12-31	2026-02-05	10-K	26-000006
25	revenue	us-gaap:Revenues	$10.7B	2022-12-31	2025-02-06	10-K	25-000006
26	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$402.0M	2025-12-31	2026-02-05	10-K	26-000006

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27	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$393.0M	2024-12-31	2026-02-05	10-K	26-000006
28	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$367.0M	2024-12-31	2026-02-05	10-K	26-000006
29	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$970.0M	2023-12-31	2026-02-05	10-K	26-000006
30	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$292.0M	2023-12-31	2026-02-05	10-K	26-000006
31	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$766.0M	2022-12-31	2025-02-06	10-K	25-000006
32	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$284.0M	2022-12-31	2025-02-06	10-K	25-000006
33	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$329.0M	2025-12-31	2026-02-05	10-K	26-000006
34	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$777.0M	2025-12-31	2026-02-05	10-K	26-000006
35	income tax	us-gaap:IncomeTaxExpenseBenefit	$172.0M	2025-12-31	2026-02-05	10-K	26-000006
36	current assets	us-gaap:AssetsCurrent	$3.2B	2024-12-31	2026-02-05	10-K	26-000006
37	current liabilities	us-gaap:LiabilitiesCurrent	$3.0B	2024-12-31	2026-02-05	10-K	26-000006
38	assets	us-gaap:Assets	$11.2B	2023-12-31	2025-02-06	10-K	25-000006
39	assets	us-gaap:Assets	$10.9B	2022-12-31	2024-02-01	10-K	24-000007
40	shares outstanding	dei:EntityCommonStockSharesOutstanding	39,242,688	2026-01-30	2026-02-05	10-K	26-000006
41	shares outstanding	dei:EntityCommonStockSharesOutstanding	39,130,163	2025-01-31	2025-02-06	10-K	25-000006

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