Minerals Technologies Inc. MTX

NYSE; chemicals; SIC 2810, Industrial Inorganic Chemicals; CIK 0000891014

B

second fifth of 330 graded peers in the pooled industrial group

rank 75 of 330; percentile 24.3; sampling error 2.7 points; lower is stronger

A B C D E

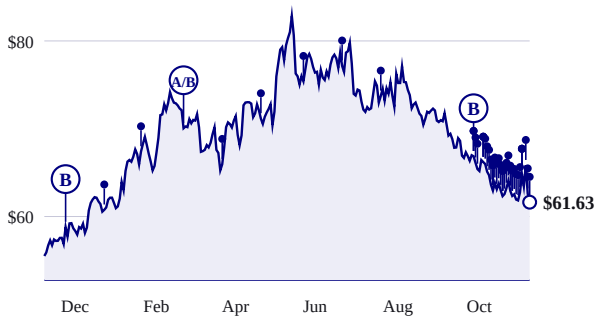
B, the elk



Scoreboard

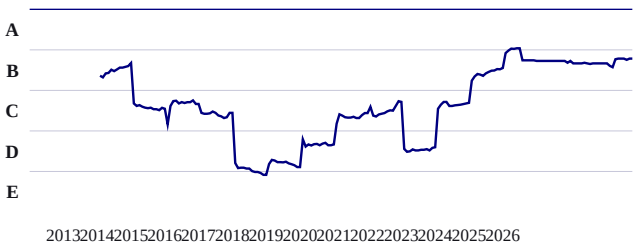
Profitability	B/C percentile 40.5
Solvency	C percentile 45.6
Growth and financing	B percentile 36.7
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $3.5B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered
Inputs computable	10 of 14
Graded from	filings received through Feb 20, 2026 260 days before the rescan; latest periodic filing 10-Q received Oct 30, 2026
Last close	$61.50 2026-11-06; market equity $1.9B; 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 20, 2026

Minerals Technologies Inc. (together with its subsidiaries, the "Company," "MTI," "we," "us" or "our") is a global, technology-driven specialty minerals company that develops, produces, and markets a wide range of minerals and mineral-based products and services. We are the world's largest producer of bentonite and a leading producer of calcium carbonate. Our products and minerals are an essential part of everyday life for millions of people around the world.

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 40.5						
Gross profitability	14.9%	21.4%		68.3	358	2025-12-31
Return on invested capital	not computable	9.3%				
pretax income must exceed the validity floor and imply a 0%-100% tax rate						
Accruals ratio	(6.2%)	(4.2%)		33.8	397	2025-12-31

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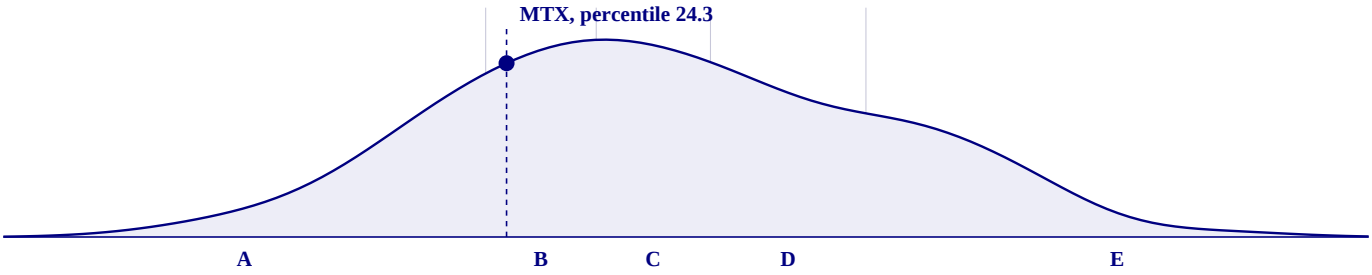
Gross margin stability, five years	1.4 pts	2.2 pts	19.4	300	2025-12-31
Solvency, sleeve percentile 45.6					
Twelve-month failure probability	0.05%	0.04%	53.7	42	2026-10-04
Altman Z double-prime	4.61	3.41	30.5	299	2025-12-31
Net debt to EBITDA	not computable	1.88x			
required facts have no common fiscal period end					
Interest coverage	not computable	4.16x			
latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31					
Current ratio	2.08x	2.20x	52.5	420	2025-12-31
Growth and financing, sleeve percentile 36.7					
Revenue growth, three-year compound	(0.8%)	1.2%	59.2	349	2025-12-31
Free cash flow growth, three-year compound	54.7%	12.5%	8.8	182	2025-12-31
Reinvestment rate	not computable	21.8%			
latest aligned inputs end 2019-12-31; latest annual assets end 2025-12-31					
Asset growth, three years	0.7%	2.9%	62.5	366	2025-12-31
Net share issuance, one year	(2.7%)	0.0%	16.5	317	2026-02-06

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
70	Aptargroup, Inc. (ATR)	22.8	A/B	
71	AAR Corp. (AIR)	23.2	B	
72	Axcelis Technologies Inc. (ACLS)	23.6	B	
73	CSW Industrials, Inc. (CSW)	23.7	B	
74	AeroVironment Inc. (AVAV)	24.0	B	
75	Minerals Technologies Inc. (MTX)	24.3	B	
76	Griffon Corp. (GFF)	24.4	B	
77	Tennant Co. (TNC)	24.8	B	
78	Armstrong World Industries Inc. (AWI)	25.2	B	
79	ATI Inc. (ATI)	25.6	B	
80	Xylem Inc. (XYL)	26.0	B	

What the price implies

at the 2026-11-06 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	15.8%	11.0%	57
Distance from 52-week high	(25.6%)	(26.1%)	51
EBIT to enterprise value	1.9%	3.9%	31
Free cash flow yield	4.5%	3.4%	63
Book value to price	0.82	0.40	78
Sales to price	1.08	0.57	70
Composite equity issuance, five years	(11.3%)	(10.1%)	45

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Relative strength against the sector, log excess return	0.01	0.00	51

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 4 of 9, period end 2025-12-31	
Return on assets above zero	fail
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	fail
Cash, filings, liquidity	
Cash and equivalents	$372.1M
Operating cash flow, four quarters	$235.3M
Months of runway	not finite
Days since last periodic filing	8 (10-Q received Oct 30, 2026)
Median daily dollar volume, 63 sessions	$11.3M

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	$518.0M	2025-12-31	2026-02-20	10-K	26-000067
2	assets	us-gaap:Assets	$3.5B	2025-12-31	2026-02-20	10-K	26-000067
3	operating income	us-gaap:OperatingIncomeLoss	$47.4M	2025-12-31	2026-02-20	10-K	26-000067
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$14.0M	2025-12-31	2026-02-20	10-K	26-000067
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$4.9M	2025-12-31	2026-02-20	10-K	26-000067
6	total debt	us-gaap:LongTermDebt	$961.3M	2025-12-31	2026-02-20	10-K	26-000067
7	book equity	us-gaap:StockholdersEquity	$1.7B	2025-12-31	2026-02-20	10-K	26-000067
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$329.0M	2025-12-31	2026-02-20	10-K	26-000067
9	total debt	us-gaap:LongTermDebt	$966.1M	2024-12-31	2026-02-20	10-K	26-000067
10	book equity	us-gaap:StockholdersEquity	$1.7B	2024-12-31	2026-02-20	10-K	26-000067
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$333.1M	2024-12-31	2026-02-20	10-K	26-000067
12	net income	us-gaap:NetIncomeLoss	-$18.4M	2025-12-31	2026-02-20	10-K	26-000067
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$193.7M	2025-12-31	2026-02-20	10-K	26-000067
14	assets	us-gaap:Assets	$3.4B	2024-12-31	2026-02-20	10-K	26-000067
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$2.1B	2025-12-31	2026-02-20	10-K	26-000067
16	gross profit	us-gaap:GrossProfit	$547.7M	2024-12-31	2026-02-20	10-K	26-000067
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$2.1B	2024-12-31	2026-02-20	10-K	26-000067
18	gross profit	us-gaap:GrossProfit	$507.1M	2023-12-31	2026-02-20	10-K	26-000067
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$2.2B	2023-12-31	2026-02-20	10-K	26-000067
20	gross profit	us-gaap:GrossProfit	$465.0M	2022-12-31	2025-02-21	10-K	25-000018
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$2.1B	2022-12-31	2025-02-21	10-K	25-000018
22	gross profit	us-gaap:GrossProfit	$446.5M	2021-12-31	2024-02-16	10-K	24-000014
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.9B	2021-12-31	2024-02-16	10-K	24-000014
24	current assets	us-gaap:AssetsCurrent	$1.2B	2025-12-31	2026-02-20	10-K	26-000067
25	current liabilities	us-gaap:LiabilitiesCurrent	$555.4M	2025-12-31	2026-02-20	10-K	26-000067
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$2.5B	2025-12-31	2026-02-20	10-K	26-000067
27	liabilities	us-gaap:Liabilities	$1.7B	2025-12-31	2026-02-20	10-K	26-000067
28	operating income	us-gaap:OperatingIncomeLoss	$171.8M	2023-12-31	2026-02-20	10-K	26-000067
29	interest expense	us-gaap:InterestExpense	$59.2M	2023-12-31	2024-02-16	10-K	24-000014
30	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$107.1M	2025-12-31	2026-02-20	10-K	26-000067

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31	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$236.4M	2024-12-31	2026-02-20	10-K	26-000067
32	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$89.5M	2024-12-31	2026-02-20	10-K	26-000067
33	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$233.6M	2023-12-31	2026-02-20	10-K	26-000067
34	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$93.5M	2023-12-31	2026-02-20	10-K	26-000067
35	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$105.7M	2022-12-31	2025-02-21	10-K	25-000018
36	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$82.3M	2022-12-31	2025-02-21	10-K	25-000018
37	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$65.0M	2019-12-31	2022-02-18	10-K	22-000009
38	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$98.4M	2019-12-31	2020-02-14	10-K	20-000010
39	operating income	us-gaap:OperatingIncomeLoss	$208.7M	2019-12-31	2022-02-18	10-K	22-000009
40	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$157.3M	2019-12-31	2022-02-18	10-K	22-000009
41	income tax	us-gaap:IncomeTaxExpenseBenefit	$22.8M	2019-12-31	2022-02-18	10-K	22-000009
42	current assets	us-gaap:AssetsCurrent	$919.2M	2019-12-31	2021-02-19	10-K	21-000011
43	current liabilities	us-gaap:LiabilitiesCurrent	$398.5M	2019-12-31	2021-02-19	10-K	21-000011
44	current assets	us-gaap:AssetsCurrent	$876.3M	2018-12-31	2020-02-14	10-K	20-000010
45	current liabilities	us-gaap:LiabilitiesCurrent	$381.9M	2018-12-31	2020-02-14	10-K	20-000010
46	assets	us-gaap:Assets	$3.3B	2023-12-31	2026-02-20	10-K	26-000067
47	assets	us-gaap:Assets	$3.4B	2022-12-31	2024-02-16	10-K	24-000014
48	shares outstanding	dei:EntityCommonStockSharesOutstanding	31,048,585	2026-02-06	2026-02-20	10-K	26-000067
49	shares outstanding	dei:EntityCommonStockSharesOutstanding	31,897,554	2025-02-05	2025-02-21	10-K	25-000018

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