Post Holdings, Inc.

POST

NYSE; consumer nondurables; SIC 2040, Grain Mill Products; CIK 0001530950

C

middle fifth of 125 graded peers in consumer nondurables

rank 56 of 125; percentile 44.4; sampling error 3.8 points; lower is stronger

A B C D E

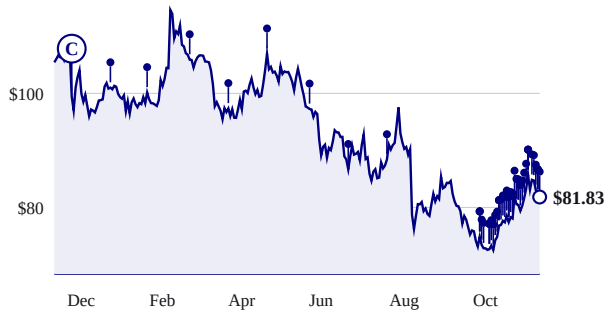
C, the tortoise



Scoreboard

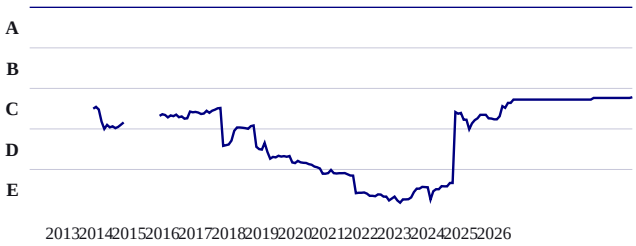
Profitability	C percentile 52.9
Solvency	C/D percentile 60.1
Growth and financing	B percentile 25.8
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $13.5B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress
Inputs computable	13 of 14
Graded from	filings received through Nov 21, 2025 355 days before the rescan; latest periodic filing 10-Q received Aug 6, 2026
Last close	$81.79 2026-11-10; market equity $3.6B; 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 Nov 21, 2025

We are a consumer packaged goods holding company with businesses operating in the center-of-the-store, refrigerated, foodservice and food ingredient categories. Unless otherwise stated or the context otherwise indicates, all references in this Form 10-K to "Post," "the Company," "us," "our" or "we" mean Post Holdings, Inc. and its subsidiaries. Post is a Missouri corporation incorporated on September 22, 2011. On February 3, 2012, Post completed its legal separation via a tax free spin-off from its former parent company. On February 6, 2012, Post common stock began trading on the New York Stock Exchange under the ticker symbol "POST".

The fourteen inputs

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

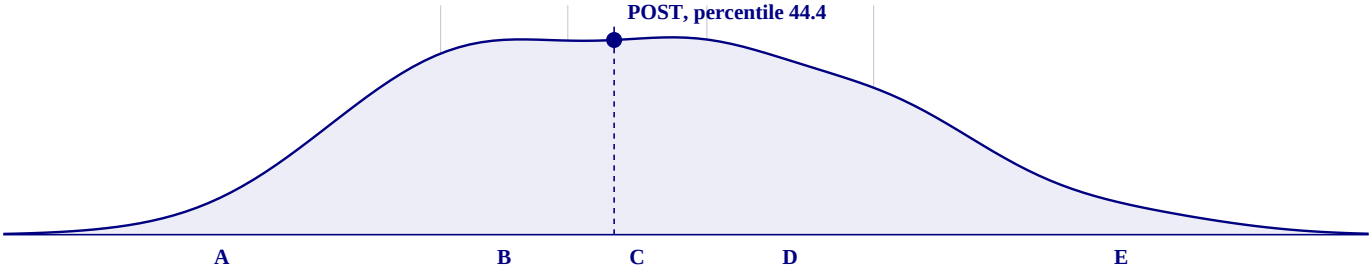
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 52.9						
Gross profitability	17.3%	29.8%		74.3	145	2025-09-30
Return on invested capital	5.7%	5.6%		47.9	49	2025-09-30
Accruals ratio	(5.0%)	(5.2%)		53.0	150	2025-09-30

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Gross margin stability, five years	1.5 pts	1.9 pts	36.2	117	2025-09-30
Solvency, sleeve percentile 60.1					
Twelve-month failure probability	not computable	0.03%			
latest liabilities, cash plus short-term investments, book equity, and shares are required					
Altman Z double-prime	1.70	3.06	61.3	120	2025-09-30
Net debt to EBITDA	5.47x	2.58x	83.3	55	2025-09-30
Interest coverage	2.21x	2.36x	48.8	44	2025-09-30
Current ratio	1.67x	1.79x	47.1	154	2025-09-30
Growth and financing, sleeve percentile 25.8					
Revenue growth, three-year compound	11.7%	0.06%	9.0	134	2025-09-30
Free cash flow growth, three-year compound	56.5%	14.9%	15.4	66	2025-09-30
Reinvestment rate	(81.0%)	11.0%	78.6	71	2025-09-30
Asset growth, three years	6.2%	0.2%	24.1	134	2025-09-30
Net share issuance, one year	(10.8%)	0.05%	1.9	104	2025-11-17

Among 125 peers

consumer nondurables; 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
51	Johnson Outdoors Inc. (JOUT)	40.3	B/C	fortress balance sheet
52	Coca Cola Co. (KO)	41.1	B/C	
53	Pilgrims Pride Corp. (PPC)	41.9	B/C	
54	Boston Beer Co. Inc. (SAM)	42.7	B/C	fortress balance sheet
55	Bridgford Foods Corp. (BRID)	43.5	B/C	
56	Post Holdings, Inc. (POST)	44.4	C	
57	Hershey Co. (HSY)	45.2	C	
58	Philip Morris International Inc. (PM)	46.0	C	
59	Altria Group, Inc. (MO)	46.8	C	
60	Hormel Foods Corp. (HRL)	47.6	C	
61	Oxford Industries Inc. (OXM)	48.4	C	

What the price implies

at the 2026-11-10 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(29.9%)	(1.3%)	22
Distance from 52-week high	(28.6%)	(20.6%)	34
EBIT to enterprise value	7.3%	3.2%	83
Free cash flow yield	13.6%	3.9%	88
Book value to price	0.86	0.53	70
Sales to price	2.27	1.17	75
Composite equity issuance, five years	(84.5%)	(16.7%)	0
Relative strength against the sector, log excess return	(0.43)	(0.09)	22

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Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 4 of 9, period end 2025-09-30	
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	fail
Current ratio improved	fail
No new shares issued	pass
Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$265.6M
Operating cash flow, four quarters	$992.6M
Months of runway	not finite
Days since last periodic filing	97 (10-Q received Aug 6, 2026)
Median daily dollar volume, 63 sessions	$57.5M

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	$2.3B	2025-09-30	2025-11-21	10-K	25-000260
2	assets	us-gaap:Assets	$13.5B	2025-09-30	2025-11-21	10-K	25-000260
3	operating income	us-gaap:OperatingIncomeLoss	$799.3M	2025-09-30	2025-11-21	10-K	25-000260
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$444.0M	2025-09-30	2025-11-21	10-K	25-000260
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$108.7M	2025-09-30	2025-11-21	10-K	25-000260
6	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$7.4B	2025-09-30	2025-11-21	10-K	25-000260
7	book equity	us-gaap:StockholdersEquity	$3.8B	2025-09-30	2025-11-21	10-K	25-000260
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$176.7M	2025-09-30	2025-11-21	10-K	25-000260
9	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$6.8B	2024-09-30	2025-11-21	10-K	25-000260
10	book equity	us-gaap:StockholdersEquity	$4.1B	2024-09-30	2025-11-21	10-K	25-000260
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$787.4M	2024-09-30	2025-11-21	10-K	25-000260
12	net income	us-gaap:NetIncomeLoss	$335.7M	2025-09-30	2025-11-21	10-K	25-000260
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$998.3M	2025-09-30	2025-11-21	10-K	25-000260
14	assets	us-gaap:Assets	$12.9B	2024-09-30	2025-11-21	10-K	25-000260
15	revenue	us-gaap:Revenues	$8.2B	2025-09-30	2025-11-21	10-K	25-000260
16	gross profit	us-gaap:GrossProfit	$2.3B	2024-09-30	2025-11-21	10-K	25-000260
17	revenue	us-gaap:Revenues	$7.9B	2024-09-30	2025-11-21	10-K	25-000260
18	gross profit	us-gaap:GrossProfit	$1.9B	2023-09-30	2025-11-21	10-K	25-000260
19	revenue	us-gaap:Revenues	$7.0B	2023-09-30	2025-11-21	10-K	25-000260
20	gross profit	us-gaap:GrossProfit	$1.5B	2022-09-30	2024-11-15	10-K	24-000365
21	revenue	us-gaap:Revenues	$5.9B	2022-09-30	2024-11-15	10-K	24-000365
22	gross profit	us-gaap:GrossProfit	$1.4B	2021-09-30	2023-11-17	10-K	23-000350
23	revenue	us-gaap:Revenues	$5.0B	2021-09-30	2023-11-17	10-K	23-000350
24	current assets	us-gaap:AssetsCurrent	$2.0B	2025-09-30	2025-11-21	10-K	25-000260
25	current liabilities	us-gaap:LiabilitiesCurrent	$1.2B	2025-09-30	2025-11-21	10-K	25-000260
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$2.1B	2025-09-30	2025-11-21	10-K	25-000260
27	liabilities	us-gaap:Liabilities	$9.8B	2025-09-30	2025-11-21	10-K	25-000260
28	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$524.3M	2025-09-30	2025-11-21	10-K	25-000260
29	interest expense	us-gaap:InterestExpense	$361.4M	2025-09-30	2025-11-21	10-K	25-000260
30	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$510.2M	2025-09-30	2025-11-21	10-K	25-000260
31	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$931.7M	2024-09-30	2025-11-21	10-K	25-000260

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32	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$429.5M	2024-09-30	2025-11-21	10-K	25-000260
33	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$750.3M	2023-09-30	2025-11-21	10-K	25-000260
34	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$303.0M	2023-09-30	2025-11-21	10-K	25-000260
35	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$382.6M	2022-09-30	2024-11-15	10-K	24-000365
36	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$255.3M	2022-09-30	2024-11-15	10-K	24-000365
37	current assets	us-gaap:AssetsCurrent	$2.2B	2024-09-30	2025-11-21	10-K	25-000260
38	current liabilities	us-gaap:LiabilitiesCurrent	$944.9M	2024-09-30	2025-11-21	10-K	25-000260
39	assets	us-gaap:Assets	$11.6B	2023-09-30	2025-11-21	10-K	25-000260
40	assets	us-gaap:Assets	$11.3B	2022-09-30	2023-11-17	10-K	23-000350
41	shares outstanding	dei:EntityCommonStockSharesOutstanding	52,154,798	2025-11-17	2025-11-21	10-K	25-000260
42	shares outstanding	dei:EntityCommonStockSharesOutstanding	58,453,277	2024-11-11	2024-11-15	10-K	24-000365

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