Element Solutions Inc.

ESI

NYSE; chemicals; SIC 2890, Miscellaneous Chemical Products; CIK 0001590714

C

middle fifth of 329 graded peers in the pooled industrial group

rank 165 of 329; percentile 53.4; sampling error 2.7 points; lower is stronger

A B C D E

C, the tortoise



Scoreboard

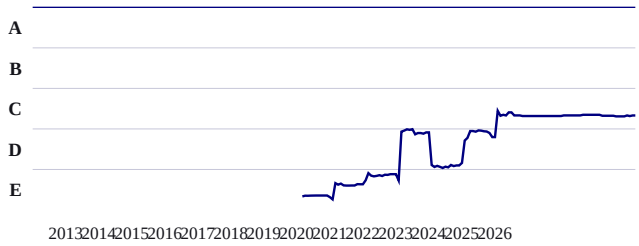
Profitability	C percentile 54.0
Solvency	B/C percentile 42.6
Growth and financing	C percentile 56.4
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $5.1B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress
Inputs computable	12 of 14
Graded from	filings received through Feb 18, 2026 267 days before the rescan; latest periodic filing 10-Q received Oct 22, 2026
Last close	$34.05 2026-11-11; market equity $8.3B; 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 18, 2026

Unless the context otherwise indicates or requires, all product names, trade names, trademarks, service marks or logos used in this 2025 Annual Report are part of our intellectual property, although the "®" and "TM" trademark designations may have been omitted.

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 54.0						
Gross profitability	21.0%	21.4%		48.9	357	2025-12-31
Return on invested capital	6.6%	9.5%		61.8	124	2025-12-31
Accruals ratio	(2.0%)	(4.2%)		69.6	396	2025-12-31
Gross margin stability, five years	1.8 pts	2.2 pts		35.6	299	2025-12-31
Solvency, sleeve percentile 42.6						
Twelve-month failure probability	not computable	0.05%				

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latest liabilities, cash plus short-term investments, book equity, and shares are required

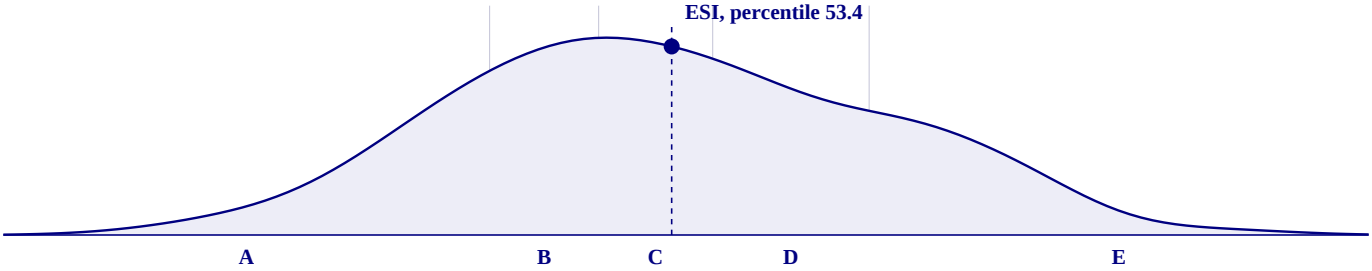
Altman Z double-prime	2.52	3.42	51.9	298	2025-12-31
Net debt to EBITDA	2.03x	1.86x	56.8	149	2025-12-31
Interest coverage	not computable	4.16x			

one or more required annual facts are missing

Current ratio	3.68x	2.20x	19.0	421	2025-12-31
Growth and financing, sleeve percentile 56.4					
Revenue growth, three-year compound	0.02%	1.2%	55.6	348	2025-12-31
Free cash flow growth, three-year compound	(2.8%)	12.5%	75.0	181	2025-12-31
Reinvestment rate	70.4%	19.3%	25.6	169	2025-12-31
Asset growth, three years	1.3%	2.8%	59.3	365	2025-12-31
Net share issuance, one year	0.5%	0.0%	66.7	316	2026-02-12

Among 329 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
160	Caterpillar Inc. (CAT)	51.8	C	
161	Linde plc (LIN)	51.8	C	
162	General Dynamics Corp. (GD)	52.2	C	
163	Agco Corp. (AGCO)	52.6	C	
164	Gorman Rupp Co. (GRC)	53.0	C	
165	Element Solutions Inc. (ESI)	53.4	C	
166	Nucor Corp. (NUE)	53.4	C	
167	Owens Corning (OC)	53.8	C	
168	Eastern Co. (EML)	54.2	C	
169	Greenland Technologies Holding Corp. (GTEC)	54.5	C	dilution, fortress balance sheet
170	Edgewell Personal Care Co. (EPC)	54.6	C	

What the price implies

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

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	36.8%	10.9%	76
Distance from 52-week high	(30.6%)	(23.0%)	37
EBIT to enterprise value	3.4%	3.7%	44
Free cash flow yield	2.8%	3.3%	43
Book value to price	0.35	0.37	46
Sales to price	0.31	0.55	26
Composite equity issuance, five years	(9.1%)	(10.2%)	54
Relative strength against the sector, log excess return	0.17	0.00	70

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Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 6 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	pass
No new shares issued	fail
Gross margin improved	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$224.9M
Operating cash flow, four quarters	$283.3M
Months of runway	not finite
Days since last periodic filing	21 (10-Q received Oct 22, 2026)
Median daily dollar volume, 63 sessions	$139.7M

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	$1.1B	2025-12-31	2026-02-18	10-K	26-000018
2	assets	us-gaap:Assets	$5.1B	2025-12-31	2026-02-18	10-K	26-000018
3	operating income	us-gaap:OperatingIncomeLoss	$342.2M	2025-12-31	2026-02-18	10-K	26-000018
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$265.6M	2025-12-31	2026-02-18	10-K	26-000018
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$74.6M	2025-12-31	2026-02-18	10-K	26-000018
6	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$1.6B	2025-12-31	2026-02-18	10-K	26-000018
7	book equity	us-gaap:StockholdersEquity	$2.7B	2025-12-31	2026-02-18	10-K	26-000018
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$626.5M	2025-12-31	2026-02-18	10-K	26-000018
9	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$1.8B	2024-12-31	2026-02-18	10-K	26-000018
10	book equity	us-gaap:StockholdersEquity	$2.4B	2024-12-31	2026-02-18	10-K	26-000018
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$359.4M	2024-12-31	2026-02-18	10-K	26-000018
12	net income	us-gaap:NetIncomeLoss	$190.8M	2025-12-31	2026-02-18	10-K	26-000018
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesC...	$289.8M	2025-12-31	2026-02-18	10-K	26-000018
14	assets	us-gaap:Assets	$4.9B	2024-12-31	2026-02-18	10-K	26-000018
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$2.6B	2025-12-31	2026-02-18	10-K	26-000018
16	gross profit	us-gaap:GrossProfit	$1.0B	2024-12-31	2026-02-18	10-K	26-000018
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$2.5B	2024-12-31	2026-02-18	10-K	26-000018
18	gross profit	us-gaap:GrossProfit	$918.5M	2023-12-31	2026-02-18	10-K	26-000018
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$2.3B	2023-12-31	2026-02-18	10-K	26-000018
20	gross profit	us-gaap:GrossProfit	$952.7M	2022-12-31	2025-02-19	10-K	25-000022
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$2.5B	2022-12-31	2025-02-19	10-K	25-000022
22	gross profit	us-gaap:GrossProfit	$960.8M	2021-12-31	2024-02-21	10-K	24-000054
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$2.4B	2021-12-31	2024-02-21	10-K	24-000054
24	current assets	us-gaap:AssetsCurrent	$1.6B	2025-12-31	2026-02-18	10-K	26-000018
25	current liabilities	us-gaap:LiabilitiesCurrent	$429.9M	2025-12-31	2026-02-18	10-K	26-000018
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$904.6M	2025-12-31	2026-02-18	10-K	26-000018
27	liabilities	us-gaap:Liabilities	$2.4B	2025-12-31	2026-02-18	10-K	26-000018
28	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$151.2M	2025-12-31	2026-02-18	10-K	26-000018
29	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$62.2M	2025-12-31	2026-02-18	10-K	26-000018
30	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesC...	$362.0M	2024-12-31	2026-02-18	10-K	26-000018
31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$68.4M	2024-12-31	2026-02-18	10-K	26-000018

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32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesC...	$333.6M	2023-12-31	2026-02-18	10-K	26-000018
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$52.7M	2023-12-31	2026-02-18	10-K	26-000018
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$295.9M	2022-12-31	2023-02-22	10-K	23-000027
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$47.8M	2022-12-31	2025-02-19	10-K	25-000022
36	current assets	us-gaap:AssetsCurrent	$1.3B	2024-12-31	2026-02-18	10-K	26-000018
37	current liabilities	us-gaap:LiabilitiesCurrent	$379.7M	2024-12-31	2026-02-18	10-K	26-000018
38	assets	us-gaap:Assets	$5.0B	2023-12-31	2025-02-19	10-K	25-000022
39	assets	us-gaap:Assets	$4.9B	2022-12-31	2024-02-21	10-K	24-000054
40	shares outstanding	dei:EntityCommonStockSharesOutstanding	243,578,414	2026-02-12	2026-02-18	10-K	26-000018
41	shares outstanding	dei:EntityCommonStockSharesOutstanding	242,452,327	2025-02-14	2025-02-19	10-K	25-000022

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