# Regal Rexnord Corp.

**RRX**

NYSE; manufacturing; SIC 3569, General Industrial Machinery & Equipment, NEC; CIK 0000082811

# D/E

**on the D/E boundary of 254 graded peers in manufacturing**

rank 202 of 254; percentile 79.4; sampling error 3.0 points; lower is stronger

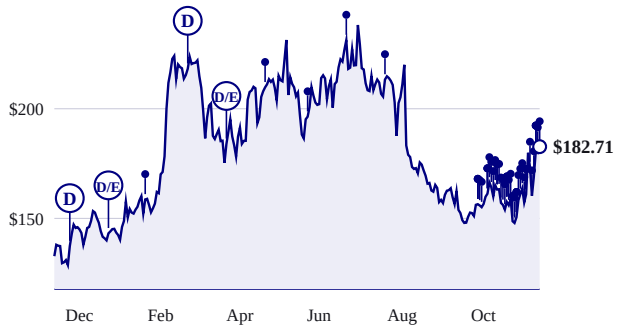
A B C D E

**D/E, the sloth**



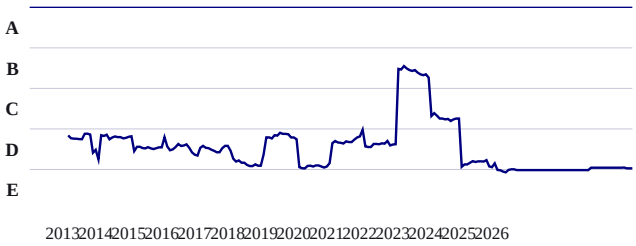
| Scoreboard | |
|---|---|
| **Profitability** | C/D<br>percentile 62.0 |
| **Solvency** | D<br>percentile 71.3 |
| **Growth and financing** | C<br>percentile 45.2 |
| **Reliability** | 0.94 AUC<br>filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025 |
| **Peer failure rate** | 0.52% a year<br>Item 1.03 bankruptcies, same asset band, 2012 to 2025 |
| **Size band** | over $2.67B assets<br>total assets $13.9B |
| **Standard universe** | inside<br>revenue above $1M and assets above $10M |
| **Warnings** | none triggered<br>not computable: distress |
| **Inputs computable** | 11 of 14 |
| **Graded from** | filings received through Feb 20, 2026<br>265 days before the rescan; latest periodic filing 10-Q received Nov 3, 2026 |
| **Last close** | $182.81<br>2026-11-11; market equity $12.2B; 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*

Regal Rexnord Corporation (NYSE: RRX) ("we," "us," "our" or the "Company") and its associates around the world help create a better tomorrow by providing sustainable solutions that power, transmit and control motion. The Company's electric motors and air moving subsystems provide the power to create motion. A portfolio of highly engineered power transmission components and subsystems efficiently transmits motion to power industrial applications. The Company's automation offering, comprised of controllers, drives, precision motors, and actuators, controls motion in applications ranging from factory automation to precision tools used in surgical applications.

## 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 62.0** | | | | | | |
| Gross profitability | 15.9% | 22.0% | | 69.2 | 274 | 2025-12-31 |
| Return on invested capital | 4.8% | 9.7% | | 73.7 | 100 | 2025-12-31 |

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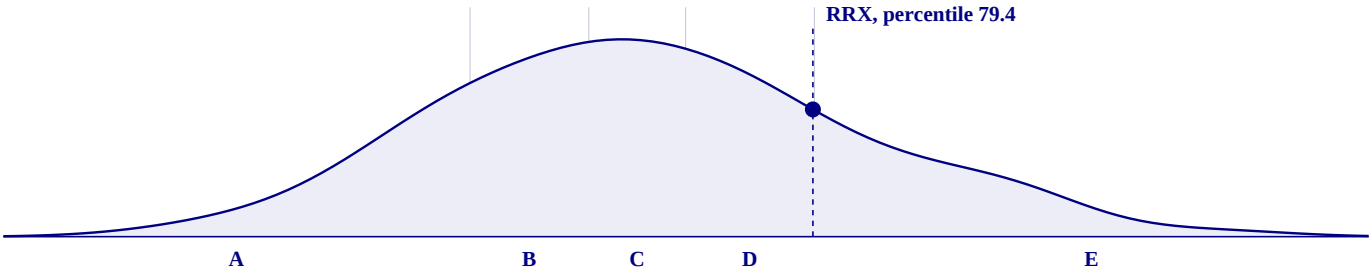
| | | | | | |
|---|---|---|---|---|---|
| Accruals ratio | (5.1%) | (3.7%) | 38.8 | 305 | 2025-12-31 |
| Gross margin stability, five years | 3.0 pts | 2.1 pts | 66.1 | 228 | 2025-12-31 |
| **Solvency, sleeve percentile 71.3** | | | | | |
| Twelve-month failure probability | not computable | 0.05% | | | |
| *liabilities and a nearby cover-page share count are required at 2026-09-30* | | | | | |
| Altman Z double-prime | not computable | 3.72 | | | |
| *one or more required annual facts are missing* | | | | | |
| Net debt to EBITDA | 5.14x | 1.77x | 89.9 | 120 | 2025-12-31 |
| Interest coverage | not computable | 5.09x | | | |
| *latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31* | | | | | |
| Current ratio | 2.15x | 2.26x | 52.6 | 324 | 2025-12-31 |
| **Growth and financing, sleeve percentile 45.2** | | | | | |
| Revenue growth, three-year compound | 4.4% | 2.2% | 37.1 | 268 | 2025-12-31 |
| Free cash flow growth, three-year compound | 36.3% | 13.7% | 19.4 | 140 | 2025-12-31 |
| Reinvestment rate | (26.6%) | 24.5% | 81.8 | 138 | 2025-12-31 |
| Asset growth, three years | 10.7% | 4.1% | 25.1 | 276 | 2025-12-31 |
| Net share issuance, one year | 0.3% | 0.0% | 62.8 | 240 | 2026-02-18 |

## Among 254 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 |
|---|---|---|---|---|
| 197 | Avery Dennison Corp. (AVY) | 77.5 | D/E | |
| 198 | Mativ Holdings, Inc. (MATV) | 77.9 | D/E | |
| 199 | Otis Worldwide Corp. (OTIS) | 78.3 | D/E | |
| 200 | Emerson Electric Co. (EMR) | 78.7 | D/E | |
| 201 | Silgan Holdings Inc. (SLGN) | 79.1 | D/E | |
| 202 | Regal Rexnord Corp. (RRX) | 79.4 | D/E | |
| 203 | Mercer International Inc. (MERC) | 79.8 | D/E | |
| 204 | NN Inc. (NNBR) | 80.2 | D/E | |
| 205 | Redwire Corp. (RDW) | 80.6 | D/E | dilution, fortress balance sheet |
| 206 | American Superconductor Corp. (AMSC) | 81.0 | D/E | |
| 207 | Crane NXT, Co. (CXT) | 81.4 | D/E | |

## 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 | 10.8% | 9.8% | 51 |
| Distance from 52-week high | (23.3%) | (23.9%) | 51 |
| EBIT to enterprise value | 4.1% | 4.0% | 51 |
| Free cash flow yield | 7.3% | 3.4% | 84 |
| Book value to price | 0.56 | 0.36 | 69 |
| Sales to price | 0.49 | 0.53 | 44 |

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| | | | |
|---|---|---|---|
| Composite equity issuance, five years | 39.2% | (9.6%) | 89 |
| Relative strength against the sector, log excess return | 0.02 | 0.01 | 51 |

## Diagnostics

*shown on every report; none enters the grade*

| Measure | Value |
|---|---|
| **Piotroski F-score 7 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 | fail |
| No new shares issued | fail |
| Gross margin improved | pass |
| Asset turnover improved | pass |
| **Cash, filings, liquidity** | |
| Cash and equivalents | $449.6M |
| Operating cash flow, four quarters | $579.2M |
| Months of runway | not finite |
| Days since last periodic filing | 9 (10-Q received Nov 3, 2026) |
| Median daily dollar volume, 63 sessions | $180.2M |

## 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 | $2.2B | 2025-12-31 | 2026-02-20 | 10-K | 26-000054 |
| 2 | assets | us-gaap:Assets | $13.9B | 2025-12-31 | 2026-02-20 | 10-K | 26-000054 |
| 3 | operating income | us-gaap:OperatingIncomeLoss | $680.8M | 2025-12-31 | 2026-02-20 | 10-K | 26-000054 |
| 4 | pretax income | us-gaap:IncomeLossFromContinuingOperationsBeforeInc... | $352.5M | 2025-12-31 | 2026-02-20 | 10-K | 26-000054 |
| 5 | income tax | us-gaap:IncomeTaxExpenseBenefit | $71.7M | 2025-12-31 | 2026-02-20 | 10-K | 26-000054 |
| 6 | total debt | us-gaap:LongTermDebt | $4.8B | 2025-12-31 | 2026-02-20 | 10-K | 26-000054 |
| 7 | book equity | us-gaap:StockholdersEquity | $6.8B | 2025-12-31 | 2026-02-20 | 10-K | 26-000054 |
| 8 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $521.7M | 2025-12-31 | 2026-02-20 | 10-K | 26-000054 |
| 9 | total debt | us-gaap:LongTermDebt | $5.5B | 2024-12-31 | 2025-02-21 | 10-K | 25-000046 |
| 10 | book equity | us-gaap:StockholdersEquity | $6.3B | 2024-12-31 | 2026-02-20 | 10-K | 26-000054 |
| 11 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $393.5M | 2024-12-31 | 2026-02-20 | 10-K | 26-000054 |
| 12 | net income | us-gaap:NetIncomeLoss | $279.5M | 2025-12-31 | 2026-02-20 | 10-K | 26-000054 |
| 13 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $990.8M | 2025-12-31 | 2026-02-20 | 10-K | 26-000054 |
| 14 | assets | us-gaap:Assets | $14.0B | 2024-12-31 | 2026-02-20 | 10-K | 26-000054 |
| 15 | revenue | us-gaap:RevenueFromContractWithCustomerIncludingAs... | $5.9B | 2025-12-31 | 2026-02-20 | 10-K | 26-000054 |
| 16 | gross profit | us-gaap:GrossProfit | $2.2B | 2024-12-31 | 2026-02-20 | 10-K | 26-000054 |
| 17 | revenue | us-gaap:RevenueFromContractWithCustomerIncludingAs... | $6.0B | 2024-12-31 | 2026-02-20 | 10-K | 26-000054 |
| 18 | gross profit | us-gaap:GrossProfit | $2.1B | 2023-12-31 | 2026-02-20 | 10-K | 26-000054 |
| 19 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $6.3B | 2023-12-31 | 2024-02-26 | 10-K | 24-000035 |
| 20 | gross profit | us-gaap:GrossProfit | $1.7B | 2022-12-31 | 2025-02-21 | 10-K | 25-000046 |
| 21 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $5.2B | 2022-12-31 | 2024-02-26 | 10-K | 24-000035 |
| 22 | gross profit | us-gaap:GrossProfit | $1.1B | 2022-01-01 | 2024-02-26 | 10-K | 24-000035 |
| 23 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $3.8B | 2022-01-01 | 2024-02-26 | 10-K | 24-000035 |
| 24 | depreciation amortization | us-gaap:Depreciation | $154.5M | 2025-12-31 | 2026-02-20 | 10-K | 26-000054 |
| 25 | operating income | us-gaap:OperatingIncomeLoss | $377.1M | 2023-12-31 | 2026-02-20 | 10-K | 26-000054 |
| 26 | interest expense | us-gaap:InterestExpense | $431.0M | 2023-12-31 | 2024-02-26 | 10-K | 24-000035 |
| 27 | current assets | us-gaap:AssetsCurrent | $2.7B | 2025-12-31 | 2026-02-20 | 10-K | 26-000054 |
| 28 | current liabilities | us-gaap:LiabilitiesCurrent | $1.3B | 2025-12-31 | 2026-02-20 | 10-K | 26-000054 |
| 29 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $97.7M | 2025-12-31 | 2026-02-20 | 10-K | 26-000054 |

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| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| 30 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $609.4M | 2024-12-31 | 2026-02-20 | 10-K | 26-000054 |
| 31 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $109.5M | 2024-12-31 | 2026-02-20 | 10-K | 26-000054 |
| 32 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $715.3M | 2023-12-31 | 2026-02-20 | 10-K | 26-000054 |
| 33 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $119.1M | 2023-12-31 | 2026-02-20 | 10-K | 26-000054 |
| 34 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $436.2M | 2022-12-31 | 2025-02-21 | 10-K | 25-000046 |
| 35 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $83.8M | 2022-12-31 | 2025-02-21 | 10-K | 25-000046 |
| 36 | current assets | us-gaap:AssetsCurrent | $2.8B | 2024-12-31 | 2026-02-20 | 10-K | 26-000054 |
| 37 | current liabilities | us-gaap:LiabilitiesCurrent | $1.2B | 2024-12-31 | 2026-02-20 | 10-K | 26-000054 |
| 38 | assets | us-gaap:Assets | $15.4B | 2023-12-31 | 2025-02-21 | 10-K | 25-000046 |
| 39 | assets | us-gaap:Assets | $10.3B | 2022-12-31 | 2024-02-26 | 10-K | 24-000035 |
| 40 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 66,499,582 | 2026-02-18 | 2026-02-20 | 10-K | 26-000054 |
| 41 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 66,268,365 | 2025-02-19 | 2025-02-21 | 10-K | 25-000046 |

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