# ITT Inc.

**ITT**

NYSE; manufacturing; SIC 3561, Pumps & Pumping Equipment; CIK 0000216228

**A**

**strongest fifth of 254 graded peers in manufacturing**

rank 8 of 254; percentile 2.8; sampling error 3.0 points; lower is stronger

A B C D E

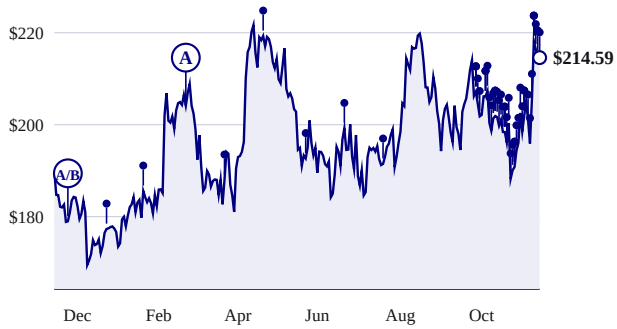
**A, the bull**



## Scoreboard

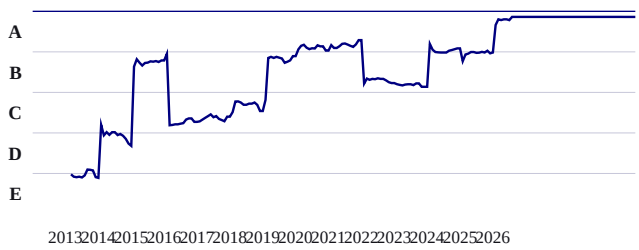
| | |
|---|---|
| **Profitability** | B/C<br>percentile 37.0 |
| **Solvency** | A/B<br>percentile 21.2 |
| **Growth and financing** | B<br>percentile 28.1 |
| **Reliability** | 0.94 AUC<br>filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025 |
| **Peer failure rate** | 0.52% a year<br>Item 1.03 bankruptcies, same asset band, 2012 to 2025 |
| **Size band** | over $2.67B assets<br>total assets $6.3B |
| **Standard universe** | inside<br>revenue above $1M and assets above $10M |
| **Warnings** | none triggered; fortress balance sheet<br>not computable: distress |
| **Inputs computable** | 12 of 14 |
| **Graded from** | filings received through Feb 9, 2026<br>277 days before the rescan; latest periodic filing 10-Q received Nov 5, 2026 |
| **Last close** | $214.56<br>2026-11-12; market equity $19.1B; 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 9, 2026*

(Amounts reported in this Annual Report on Form 10-K, except per share amounts, are stated in millions unless otherwise specified. References herein to "ITT," the "Company," and such words as "we," "us," and "our" include ITT Inc. and its subsidiaries on a consolidated basis, unless the context otherwise indicates.) ITT is a diversified manufacturer of highly engineered critical components and customized technology solutions primarily for the transportation, industrial and energy markets. We manufacture components that are integral to the operation of equipment, systems and manufacturing processes in these key markets.

## 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 37.0** | | | | | | |
| Gross profitability | 22.1% | 22.0% | | 46.5 | 274 | 2025-12-31 |
| Return on invested capital | 19.0% | 9.7% | | 19.2 | 100 | 2025-12-31 |
| Accruals ratio | (3.3%) | (3.7%) | | 53.0 | 305 | 2025-12-31 |

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| | | | | | |
|---|---|---|---|---|---|
| Gross margin stability, five years | 1.6 pts | 2.1 pts | 29.5 | 228 | 2025-12-31 |
| **Solvency, sleeve percentile 21.2** | | | | | |
| Twelve-month failure probability | not computable | 0.05% | | | |
| *latest liabilities, cash plus short-term investments, book equity, and shares are required* | | | | | |
| Altman Z double-prime | 6.34 | 3.72 | 20.4 | 241 | 2025-12-31 |
| Net debt to EBITDA | (1.48x) | 1.77x | 4.2 | 120 | 2025-12-31 |
| Interest coverage | not computable | 5.09x | | | |
| *latest aligned inputs end 2014-12-31; latest annual assets end 2025-12-31* | | | | | |
| Current ratio | 2.58x | 2.26x | 39.0 | 324 | 2025-12-31 |
| **Growth and financing, sleeve percentile 28.1** | | | | | |
| Revenue growth, three-year compound | 9.6% | 2.2% | 23.2 | 268 | 2025-12-31 |
| Free cash flow growth, three-year compound | 46.6% | 13.7% | 12.9 | 140 | 2025-12-31 |
| Reinvestment rate | 287.0% | 24.5% | 5.8 | 138 | 2025-12-31 |
| Asset growth, three years | 18.6% | 4.1% | 12.7 | 276 | 2025-12-31 |
| Net share issuance, one year | 5.7% | 0.0% | 85.8 | 240 | 2026-02-06 |

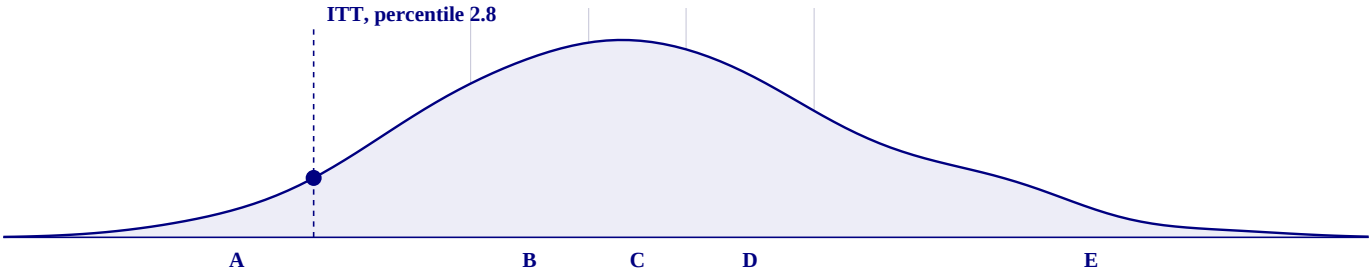
## Warnings

*1 of 7 checks triggered; none of them enters the letter*

| Check | Measured |
|---|---|
| Fortress balance sheet | cash minus debt is 1,221,400,000 USD; Altman Z is not used |

## 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 |
|---|---|---|---|---|
| 3 | Sono TEK Corp. (SOTK) | 0.8 | A | fortress balance sheet |
| 4 | Cactus, Inc. (WHD) | 1.2 | A | fortress balance sheet |
| 5 | Deckers Outdoor Corp. (DECK) | 1.6 | A | |
| 6 | Proto Labs Inc. (PRLB) | 2.0 | A | fortress balance sheet |
| 7 | Franklin Electric Co. Inc. (FELE) | 2.4 | A | |
| 8 | ITT Inc. (ITT) | 2.8 | A | fortress balance sheet |
| 9 | Smith Midland Corp. (SMID) | 3.2 | A | late filer |
| 10 | Simpson Manufacturing Co., Inc. (SSD) | 3.6 | A | fortress balance sheet |
| 11 | Alamo Group Inc. (ALG) | 4.0 | A | fortress balance sheet |
| 12 | Graco Inc. (GGG) | 4.3 | A | |
| 13 | ACM Research, Inc. (ACMR) | 4.7 | A | fortress balance sheet |

## What the price implies

*at the 2026-11-12 close; none of these enters the grade*

| Measure | Value | Peer median | Percentile |
|---|---|---|---|
| Twelve-month price change, skipping the latest month | 9.7% | 9.8% | 50 |
| Distance from 52-week high | (3.2%) | (24.2%) | 94 |
| EBIT to enterprise value | 3.2% | 4.1% | 41 |

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| | | | |
|---|---|---|---|
| Free cash flow yield | 2.9% | 3.5% | 41 |
| Book value to price | 0.25 | 0.37 | 33 |
| Sales to price | 0.21 | 0.54 | 14 |
| Composite equity issuance, five years | (2.7%) | (9.6%) | 60 |
| Relative strength against the sector, log excess return | 0.01 | 0.01 | 50 |

## Diagnostics

*shown on every report; none enters the grade*

| Measure | Value |
|---|---|
| **Piotroski F-score 5 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 | fail |
| Current ratio improved | pass |
| No new shares issued | fail |
| Gross margin improved | pass |
| Asset turnover improved | fail |
| **Cash, filings, liquidity** | |
| Cash and equivalents | $558.1M |
| Operating cash flow, four quarters | $771.4M |
| Months of runway | not finite |
| Days since last periodic filing | 8 (10-Q received Nov 5, 2026) |
| Median daily dollar volume, 63 sessions | $150.5M |

## 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 | $1.4B | 2025-12-31 | 2026-02-09 | 10-K | 26-000012 |
| 2 | assets | us-gaap:Assets | $6.3B | 2025-12-31 | 2026-02-09 | 10-K | 26-000012 |
| 3 | operating income | us-gaap:OperatingIncomeLoss | $684.5M | 2025-12-31 | 2026-02-09 | 10-K | 26-000012 |
| 4 | pretax income | us-gaap:IncomeLossFromContinuingOperationsBeforeInc... | $651.5M | 2025-12-31 | 2026-02-09 | 10-K | 26-000012 |
| 5 | income tax | us-gaap:IncomeTaxExpenseBenefit | $160.1M | 2025-12-31 | 2026-02-09 | 10-K | 26-000012 |
| 6 | total debt | us-gaap:LongTermDebtAndCapitalLeaseObligations | $521.5M | 2025-12-31 | 2026-02-09 | 10-K | 26-000012 |
| 7 | book equity | us-gaap:StockholdersEquity | $4.1B | 2025-12-31 | 2026-02-09 | 10-K | 26-000012 |
| 8 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $1.7B | 2025-12-31 | 2026-02-09 | 10-K | 26-000012 |
| 9 | total debt | us-gaap:LongTermDebtAndCapitalLeaseObligations | $232.6M | 2024-12-31 | 2026-02-09 | 10-K | 26-000012 |
| 10 | book equity | us-gaap:StockholdersEquity | $2.8B | 2024-12-31 | 2026-02-09 | 10-K | 26-000012 |
| 11 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $439.3M | 2024-12-31 | 2026-02-09 | 10-K | 26-000012 |
| 12 | net income | us-gaap:NetIncomeLoss | $488.0M | 2025-12-31 | 2026-02-09 | 10-K | 26-000012 |
| 13 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivitiesC... | $668.8M | 2025-12-31 | 2026-02-09 | 10-K | 26-000012 |
| 14 | assets | us-gaap:Assets | $4.7B | 2024-12-31 | 2026-02-09 | 10-K | 26-000012 |
| 15 | revenue | us-gaap:Revenues | $3.9B | 2025-12-31 | 2026-02-09 | 10-K | 26-000012 |
| 16 | gross profit | us-gaap:GrossProfit | $1.2B | 2024-12-31 | 2026-02-09 | 10-K | 26-000012 |
| 17 | revenue | us-gaap:Revenues | $3.6B | 2024-12-31 | 2026-02-09 | 10-K | 26-000012 |
| 18 | gross profit | us-gaap:GrossProfit | $1.1B | 2023-12-31 | 2026-02-09 | 10-K | 26-000012 |
| 19 | revenue | us-gaap:Revenues | $3.3B | 2023-12-31 | 2026-02-09 | 10-K | 26-000012 |
| 20 | gross profit | us-gaap:GrossProfit | $922.3M | 2022-12-31 | 2025-02-10 | 10-K | 25-000014 |
| 21 | revenue | us-gaap:Revenues | $3.0B | 2022-12-31 | 2025-02-10 | 10-K | 25-000014 |
| 22 | gross profit | us-gaap:GrossProfit | $899.5M | 2021-12-31 | 2024-02-12 | 10-K | 24-000020 |
| 23 | revenue | us-gaap:Revenues | $2.8B | 2021-12-31 | 2024-02-12 | 10-K | 24-000020 |
| 24 | current assets | us-gaap:AssetsCurrent | $3.4B | 2025-12-31 | 2026-02-09 | 10-K | 26-000012 |
| 25 | current liabilities | us-gaap:LiabilitiesCurrent | $1.3B | 2025-12-31 | 2026-02-09 | 10-K | 26-000012 |

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| | | | | | | | |
|---|---|---|---|---|---|---|---|
| 26 | retained earnings | us-gaap:RetainedEarningsAccumulatedDeficit | $3.0B | 2025-12-31 | 2026-02-09 | 10-K | 26-000012 |
| 27 | liabilities | us-gaap:Liabilities | $2.2B | 2025-12-31 | 2026-02-09 | 10-K | 26-000012 |
| 28 | depreciation amortization | us-gaap:DepreciationDepletionAndAmortization | $143.2M | 2025-12-31 | 2026-02-09 | 10-K | 26-000012 |
| 29 | operating income | us-gaap:OperatingIncomeLoss | $266.4M | 2014-12-31 | 2017-02-17 | 10-K | 17-000006 |
| 30 | interest expense | us-gaap:InterestExpense | $4.0M | 2014-12-31 | 2015-02-20 | 10-K | 15-000007 |
| 31 | capital expenditure | us-gaap:PaymentsToAcquireProductiveAssets | $121.3M | 2025-12-31 | 2026-02-09 | 10-K | 26-000012 |
| 32 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivitiesC... | $562.6M | 2024-12-31 | 2026-02-09 | 10-K | 26-000012 |
| 33 | capital expenditure | us-gaap:PaymentsToAcquireProductiveAssets | $123.9M | 2024-12-31 | 2026-02-09 | 10-K | 26-000012 |
| 34 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivitiesC... | $538.0M | 2023-12-31 | 2026-02-09 | 10-K | 26-000012 |
| 35 | capital expenditure | us-gaap:PaymentsToAcquireProductiveAssets | $107.6M | 2023-12-31 | 2026-02-09 | 10-K | 26-000012 |
| 36 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivitiesC... | $277.7M | 2022-12-31 | 2025-02-10 | 10-K | 25-000014 |
| 37 | capital expenditure | us-gaap:PaymentsToAcquireProductiveAssets | $103.9M | 2022-12-31 | 2025-02-10 | 10-K | 25-000014 |
| 38 | current assets | us-gaap:AssetsCurrent | $1.9B | 2024-12-31 | 2026-02-09 | 10-K | 26-000012 |
| 39 | current liabilities | us-gaap:LiabilitiesCurrent | $1.3B | 2024-12-31 | 2026-02-09 | 10-K | 26-000012 |
| 40 | assets | us-gaap:Assets | $3.9B | 2023-12-31 | 2025-02-10 | 10-K | 25-000014 |
| 41 | assets | us-gaap:Assets | $3.8B | 2022-12-31 | 2024-02-12 | 10-K | 24-000020 |
| 42 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 86,000,000 | 2026-02-06 | 2026-02-09 | 10-K | 26-000012 |
| 43 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 81,400,000 | 2025-02-07 | 2025-02-10 | 10-K | 25-000014 |

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