# Goodyear Tire & Rubber Co.

**GT**

Nasdaq; manufacturing; SIC 3011, Tires & Inner Tubes; CIK 0000042582

**E**

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

rank 227 of 254; percentile 89.3; sampling error 3.0 points; lower is stronger

A B C D E

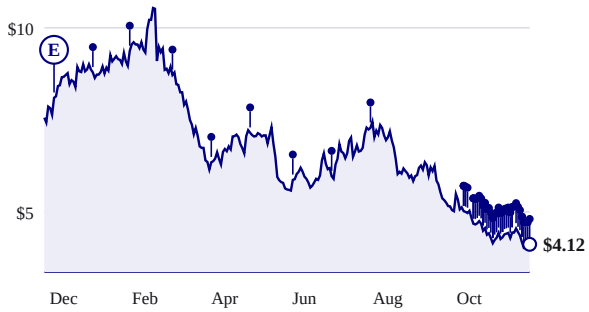
**E, the bear**



## Scoreboard

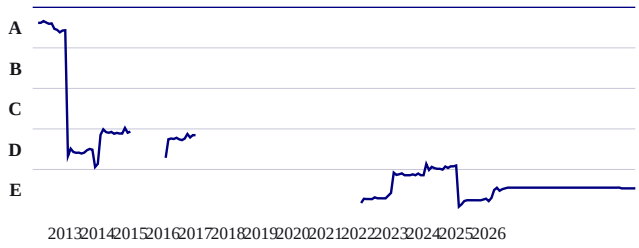
| | |
|---|---|
| **Profitability** | B<br>percentile 32.0 |
| **Solvency** | E<br>percentile 90.7 |
| **Growth and financing** | D<br>percentile 76.3 |
| **Reliability** | 0.94 AUC<br>filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025 |
| **Peer failure rate** | 0.52% a year<br>Item 1.03 bankruptcies, same asset band, 2012 to 2025 |
| **Size band** | over $2.67B assets<br>total assets $18.2B |
| **Standard universe** | inside<br>revenue above $1M and assets above $10M |
| **Warnings** | none triggered<br>not computable: distress |
| **Inputs computable** | 7 of 14 |
| **Graded from** | filings received through Feb 10, 2026<br>278 days before the rescan; latest periodic filing 10-Q received Nov 5, 2026 |
| **Last close** | $4.13<br>2026-11-13; market equity $1.2B; 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 10, 2026*

The Goodyear Tire & Rubber Company (the "Company") is an Ohio corporation organized in 1898. Its principal offices are located at 200 Innovation Way, Akron, Ohio 44316-0001. Its telephone number is (330) 796-2121. The terms "Goodyear," "Company" and "we," "us" or "our" wherever used herein refer to the Company together with all of its consolidated U.S. and foreign subsidiary companies, unless the context indicates to the contrary. We are one of the world's leading manufacturers of tires, engaging in operations in most regions of the world. In 2025, our net sales were $18,280 million and Goodyear net loss was $1,721 million.

## 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 32.0** | | | | | | |
| Gross profitability | 18.5% | 22.0% | | 57.1 | 274 | 2025-12-31 |
| Return on invested capital | not computable | 9.7% | | | | |

*latest aligned inputs end 2015-12-31; latest annual assets end 2025-12-31*

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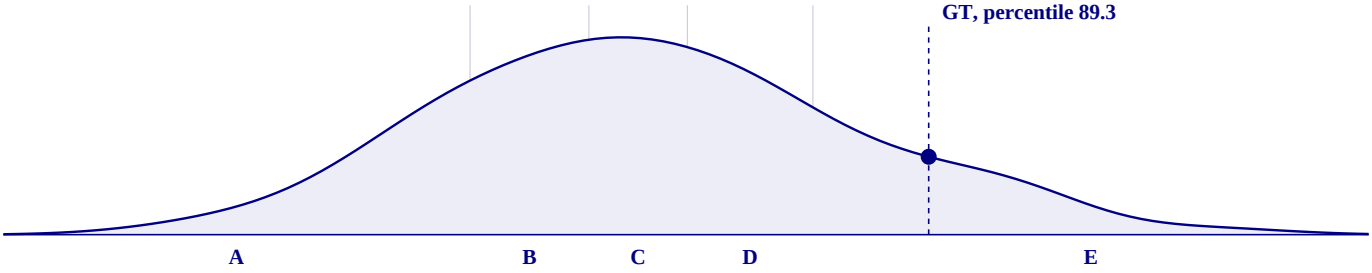
| | | | | | |
|---|---|---|---|---|---|
| Accruals ratio | (12.9%) | (3.7%) | 13.2 | 303 | 2025-12-31 |
| Gross margin stability, five years | 1.5 pts | 2.1 pts | 25.6 | 228 | 2025-12-31 |
| **Solvency, sleeve percentile 90.7** | | | | | |
| Twelve-month failure probability | not computable | 0.04% | | | |
| *latest liabilities, cash plus short-term investments, book equity, and shares are required* | | | | | |
| Altman Z double-prime | not computable | 3.72 | | | |
| *latest aligned inputs end 2015-12-31; latest annual assets end 2025-12-31* | | | | | |
| Net debt to EBITDA | not computable | 1.77x | | | |
| *latest aligned inputs end 2015-12-31; latest annual assets end 2025-12-31* | | | | | |
| Interest coverage | not computable | 5.09x | | | |
| *latest aligned inputs end 2015-12-31; latest annual assets end 2025-12-31* | | | | | |
| Current ratio | 1.06x | 2.26x | 90.7 | 322 | 2025-12-31 |
| **Growth and financing, sleeve percentile 76.3** | | | | | |
| Revenue growth, three-year compound | (4.2%) | 2.2% | 78.7 | 268 | 2025-12-31 |
| Free cash flow growth, three-year compound | not computable | 13.7% | | | |
| *current FCF must be positive and base FCF must exceed $100,000* | | | | | |
| Reinvestment rate | not computable | 24.5% | | | |
| *latest aligned inputs end 2015-12-31; latest annual assets end 2025-12-31* | | | | | |
| Asset growth, three years | (6.7%) | 4.1% | 84.2 | 274 | 2025-12-31 |
| Net share issuance, one year | 0.4% | 0.0% | 66.1 | 240 | 2026-01-31 |

## 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 |
|---|---|---|---|---|
| 222 | Matthews International Corp. (MATW) | 87.4 | E | |
| 223 | Graphic Packaging Holding Co. (GPK) | 87.7 | E | |
| 224 | Liqtech International Inc. (LIQT) | 88.1 | E | |
| 225 | SunCoke Energy, Inc. (SXC) | 88.5 | E | |
| 226 | CPI Aerostructures Inc. (CVU) | 88.9 | E | late filer |
| 227 | Goodyear Tire & Rubber Co. (GT) | 89.3 | E | |
| 228 | Boeing Co. (BA) | 89.9 | E | |
| 229 | Boeing Co. (BA-PA) | 89.9 | E | |
| 230 | Metallus Inc. (MTUS) | 90.5 | E | fortress balance sheet |
| 231 | Greif, Inc. (GEF) | 91.1 | E | |
| 232 | Greif, Inc. (GEF-B) | 91.1 | E | |

## What the price implies

*at the 2026-11-13 close; none of these enters the grade*

| Measure | Value | Peer median | Percentile |
|---|---|---|---|
| Twelve-month price change, skipping the latest month | (27.9%) | 9.8% | 17 |
| Distance from 52-week high | (60.9%) | (25.1%) | 12 |
| EBIT to enterprise value | 31.6% | 4.1% | 98 |

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| | | | |
|---|---|---|---|
| Free cash flow yield | (2.5%) | 3.4% | 18 |
| Book value to price | 2.22 | 0.36 | 96 |
| Sales to price | 15.41 | 0.54 | 98 |
| Composite equity issuance, five years | 21.1% | (9.6%) | 81 |
| Relative strength against the sector, log excess return | (0.41) | 0.01 | 17 |

## 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 | pass |
| No new shares issued | fail |
| Gross margin improved | fail |
| Asset turnover improved | fail |
| **Cash, filings, liquidity** | |
| Cash and equivalents | $812.0M |
| Operating cash flow, four quarters | $748.0M |
| Months of runway | not finite |
| Days since last periodic filing | 10 (10-Q received Nov 5, 2026) |
| Median daily dollar volume, 63 sessions | $40.8M |

## 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 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $18.3B | 2025-12-31 | 2026-02-10 | 10-K | 26-006708 |
| 2 | cost of revenue | us-gaap:CostOfGoodsAndServicesSold | $14.9B | 2025-12-31 | 2026-02-10 | 10-K | 26-006708 |
| 3 | assets | us-gaap:Assets | $18.2B | 2025-12-31 | 2026-02-10 | 10-K | 26-006708 |
| 4 | operating income | us-gaap:OperatingIncomeLoss | $2.0B | 2015-12-31 | 2016-02-09 | 10-K | 16-013733 |
| 5 | pretax income | us-gaap:IncomeLossFromContinuingOperationsBeforeInc... | $608.0M | 2015-12-31 | 2018-02-08 | 10-K | 18-001052 |
| 6 | income tax | us-gaap:IncomeTaxExpenseBenefit | $232.0M | 2015-12-31 | 2018-02-08 | 10-K | 18-001052 |
| 7 | total debt | us-gaap:LongTermDebtAndCapitalLeaseObligations | $5.1B | 2015-12-31 | 2017-02-08 | 10-K | 17-001142 |
| 8 | book equity | us-gaap:StockholdersEquity | $3.9B | 2015-12-31 | 2017-02-08 | 10-K | 17-001142 |
| 9 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $1.5B | 2015-12-31 | 2018-02-08 | 10-K | 18-001052 |
| 10 | total debt | us-gaap:LongTermDebtAndCapitalLeaseObligations | $6.2B | 2014-12-31 | 2016-02-09 | 10-K | 16-013733 |
| 11 | book equity | us-gaap:StockholdersEquity | $3.6B | 2014-12-31 | 2016-02-09 | 10-K | 16-013733 |
| 12 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $2.2B | 2014-12-31 | 2017-02-08 | 10-K | 17-001142 |
| 13 | net income | us-gaap:NetIncomeLoss | -$1.7B | 2025-12-31 | 2026-02-10 | 10-K | 26-006708 |
| 14 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $796.0M | 2025-12-31 | 2026-02-10 | 10-K | 26-006708 |
| 15 | assets | us-gaap:Assets | $20.9B | 2024-12-31 | 2026-02-10 | 10-K | 26-006708 |
| 16 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $18.9B | 2024-12-31 | 2026-02-10 | 10-K | 26-006708 |
| 17 | cost of revenue | us-gaap:CostOfGoodsAndServicesSold | $15.2B | 2024-12-31 | 2026-02-10 | 10-K | 26-006708 |
| 18 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $20.1B | 2023-12-31 | 2026-02-10 | 10-K | 26-006708 |
| 19 | cost of revenue | us-gaap:CostOfGoodsAndServicesSold | $16.6B | 2023-12-31 | 2026-02-10 | 10-K | 26-006708 |
| 20 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $20.8B | 2022-12-31 | 2025-02-14 | 10-K | 25-020763 |
| 21 | cost of revenue | us-gaap:CostOfGoodsAndServicesSold | $17.0B | 2022-12-31 | 2025-02-14 | 10-K | 25-020763 |
| 22 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $17.5B | 2021-12-31 | 2024-02-13 | 10-K | 24-014240 |
| 23 | cost of revenue | us-gaap:CostOfGoodsAndServicesSold | $13.7B | 2021-12-31 | 2024-02-13 | 10-K | 24-014240 |
| 24 | current assets | us-gaap:AssetsCurrent | $6.1B | 2015-12-31 | 2017-02-08 | 10-K | 17-001142 |
| 25 | current liabilities | us-gaap:LiabilitiesCurrent | $5.0B | 2015-12-31 | 2017-02-08 | 10-K | 17-001142 |

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| | | | | | | | |
|---|---|---|---|---|---|---|---|
| 26 | retained earnings | us-gaap:RetainedEarningsAccumulatedDeficit | $4.6B | 2015-12-31 | 2017-02-08 | 10-K | 17-001142 |
| 27 | assets | us-gaap:Assets | $16.4B | 2015-12-31 | 2018-02-08 | 10-K | 18-001052 |
| 28 | liabilities | us-gaap:Liabilities | $12.2B | 2015-12-31 | 2017-02-08 | 10-K | 17-001142 |
| 29 | depreciation amortization | us-gaap:DepreciationDepletionAndAmortization | $698.0M | 2015-12-31 | 2018-02-08 | 10-K | 18-001052 |
| 30 | interest expense | us-gaap:InterestExpense | $438.0M | 2015-12-31 | 2018-02-08 | 10-K | 18-001052 |
| 31 | current assets | us-gaap:AssetsCurrent | $7.2B | 2025-12-31 | 2026-02-10 | 10-K | 26-006708 |
| 32 | current liabilities | us-gaap:LiabilitiesCurrent | $6.8B | 2025-12-31 | 2026-02-10 | 10-K | 26-006708 |
| 33 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $826.0M | 2025-12-31 | 2026-02-10 | 10-K | 26-006708 |
| 34 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $698.0M | 2024-12-31 | 2026-02-10 | 10-K | 26-006708 |
| 35 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $1.2B | 2024-12-31 | 2026-02-10 | 10-K | 26-006708 |
| 36 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $1.0B | 2023-12-31 | 2026-02-10 | 10-K | 26-006708 |
| 37 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $1.1B | 2023-12-31 | 2026-02-10 | 10-K | 26-006708 |
| 38 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $521.0M | 2022-12-31 | 2025-02-14 | 10-K | 25-020763 |
| 39 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $1.1B | 2022-12-31 | 2025-02-14 | 10-K | 25-020763 |
| 40 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $983.0M | 2015-12-31 | 2018-02-08 | 10-K | 18-001052 |
| 41 | current assets | us-gaap:AssetsCurrent | $7.2B | 2014-12-31 | 2016-02-09 | 10-K | 16-013733 |
| 42 | current liabilities | us-gaap:LiabilitiesCurrent | $4.7B | 2014-12-31 | 2016-02-09 | 10-K | 16-013733 |
| 43 | assets | us-gaap:Assets | $21.6B | 2023-12-31 | 2025-02-14 | 10-K | 25-020763 |
| 44 | assets | us-gaap:Assets | $22.4B | 2022-12-31 | 2024-02-13 | 10-K | 24-014240 |
| 45 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 286,247,045 | 2026-01-31 | 2026-02-10 | 10-K | 26-006708 |
| 46 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 284,974,263 | 2025-01-31 | 2025-02-14 | 10-K | 25-020763 |

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