Esco Technologies Inc. ESE

NYSE; business equipment; SIC 3669, Communications Equipment, NEC; CIK 0000866706

C

middle fifth of 494 graded peers in business equipment

rank 261 of 494; percentile 52.7; sampling error 2.2 points; lower is stronger

A B C D E

C, the tortoise



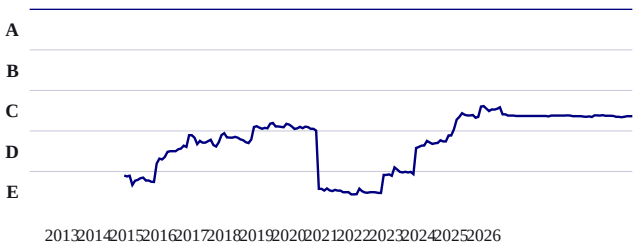
Scoreboard	
Profitability	D percentile 62.2
Solvency	B/C percentile 37.8
Growth and financing	C percentile 47.1
Reliability	0.91 AUC filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025
Peer failure rate	1.01% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$591M to $2.67B assets total assets $2.4B
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 Dec 1, 2025 350 days before the rescan; latest periodic filing 10-Q received Aug 10, 2026
Last close	$231.21 2026-11-13; market equity $6.0B; 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 Dec 1, 2025

The Registrant is ESCO Technologies Inc. (NYSE: ESE), sometimes referred to in this report as ESCO. Except where the context indicates otherwise, the terms "Company", "we", "our" and "us" are used in this report to refer to ESCO together with its subsidiaries through which its businesses are conducted. We are: ?A global provider of highly engineered components and systems for aviation, Navy, defense and industrial customers; ?An industry leader in designing and manufacturing radio frequency (RF) test and measurement products and systems; and ?A provider of diagnostic instruments, software and services to industrial power users and the electric utility and renewable energy industries.

The fourteen inputs

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

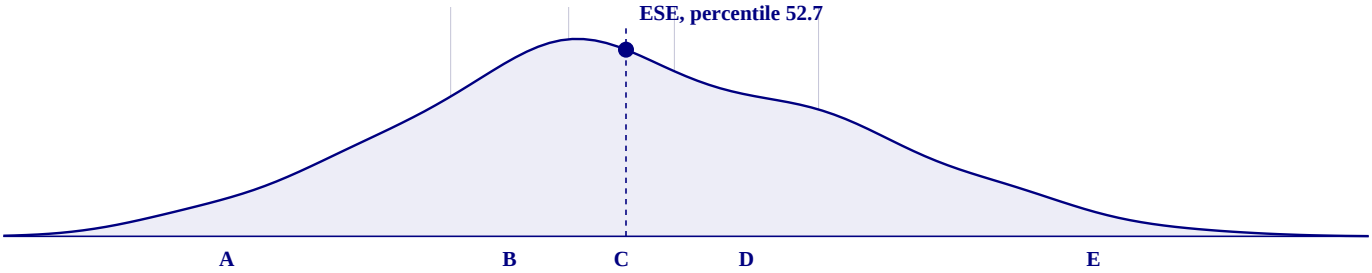
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 62.2						
Gross profitability	19.1%	28.7%		64.5	550	2025-09-30
Return on invested capital	8.9%	11.2%		53.4	132	2025-09-30

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Accruals ratio	2.7%	(7.3%)	89.7	613	2025-09-30
Gross margin stability, five years	1.8 pts	2.3 pts	41.3	422	2025-09-30
Solvency, sleeve percentile 37.8					
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	4.68	2.21	25.0	561	2025-09-30
Net debt to EBITDA	0.34x	1.09x	29.0	146	2025-09-30
Interest coverage	9.73x	3.77x	29.1	87	2025-09-30
Current ratio	1.35x	2.01x	68.3	658	2025-09-30
Growth and financing, sleeve percentile 47.1					
Revenue growth, three-year compound	8.5%	6.4%	44.2	531	2025-09-30
Free cash flow growth, three-year compound	25.8%	17.7%	39.5	264	2025-09-30
Reinvestment rate	(136.7%)	15.1%	79.7	223	2025-09-30
Asset growth, three years	13.4%	5.2%	29.1	555	2025-09-30
Net share issuance, one year	0.2%	0.5%	43.2	406	2025-11-14

Among 494 peers

business equipment; 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
256	Soundthinking, Inc. (SSTI)	51.7	C	
257	Alarm.com Holdings, Inc. (ALRM)	51.9	C	
258	Sanmina Corp. (SANM)	52.1	C	fortress balance sheet
259	Pioneer Power Solutions, Inc. (PPSI)	52.3	C	late filer, fortress balance sheet
260	Intrusion Inc. (INTZ)	52.5	C	short runway
261	Esco Technologies Inc. (ESE)	52.7	C	
262	Inve Technologies, Inc. (INVE)	52.9	C	
263	Lantronix Inc. (LTRX)	53.1	C	fortress balance sheet
264	Hubbell Inc. (HUBB)	53.3	C	
265	Broadcom Inc. (AVGO)	53.5	C	
266	CareCloud, Inc. (CCLD)	53.8	C	fortress balance sheet

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	20.9%	(2.0%)	67
Distance from 52-week high	(34.8%)	(35.0%)	51
EBIT to enterprise value	2.8%	1.7%	59
Free cash flow yield	3.4%	2.8%	54
Book value to price	0.27	0.27	49
Sales to price	0.18	0.32	34
Composite equity issuance, five years	(2.2%)	4.4%	39
Relative strength against the sector, log excess return	(0.08)	(0.29)	67

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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	pass
Operating cash flow exceeds net income	fail
Long-term leverage fell	fail
Current ratio improved	fail
No new shares issued	fail
Gross margin improved	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$73.2M
Operating cash flow, four quarters	$244.0M
Months of runway	not finite
Days since last periodic filing	98 (10-Q received Aug 10, 2026)
Median daily dollar volume, 63 sessions	$58.7M

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	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.1B	2025-09-30	2025-12-01	10-K	25-117276
2	cost of revenue	us-gaap:CostOfRevenue	$634.3M	2025-09-30	2025-12-01	10-K	25-117276
3	assets	us-gaap:Assets	$2.4B	2025-09-30	2025-12-01	10-K	25-117276
4	operating income	us-gaap:OperatingIncomeLoss	$170.4M	2025-09-30	2025-12-01	10-K	25-117276
5	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$152.9M	2025-09-30	2025-12-01	10-K	25-117276
6	income tax	us-gaap:IncomeTaxExpenseBenefit	$36.6M	2025-09-30	2025-12-01	10-K	25-117276
7	total debt	us-gaap:LongTermDebt	$186.0M	2025-09-30	2025-12-01	10-K	25-117276
8	book equity	us-gaap:StockholdersEquity	$1.5B	2025-09-30	2025-12-01	10-K	25-117276
9	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$101.3M	2025-09-30	2025-12-01	10-K	25-117276
10	total debt	us-gaap:LongTermDebt	$122.0M	2024-09-30	2025-12-01	10-K	25-117276
11	book equity	us-gaap:StockholdersEquity	$1.2B	2024-09-30	2025-12-01	10-K	25-117276
12	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$66.0M	2024-09-30	2025-12-01	10-K	25-117276
13	net income	us-gaap:NetIncomeLoss	$299.2M	2025-09-30	2025-12-01	10-K	25-117276
14	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$241.9M	2025-09-30	2025-12-01	10-K	25-117276
15	assets	us-gaap:Assets	$1.8B	2024-09-30	2025-12-01	10-K	25-117276
16	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$919.1M	2024-09-30	2025-12-01	10-K	25-117276
17	cost of revenue	us-gaap:CostOfRevenue	$530.6M	2024-09-30	2025-12-01	10-K	25-117276
18	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$855.8M	2023-09-30	2025-12-01	10-K	25-117276
19	cost of revenue	us-gaap:CostOfRevenue	$502.7M	2023-09-30	2025-12-01	10-K	25-117276
20	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$857.5M	2022-09-30	2024-11-29	10-K	24-002064
21	cost of revenue	us-gaap:CostOfRevenue	$525.5M	2022-09-30	2024-11-29	10-K	24-002064
22	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$715.4M	2021-09-30	2023-11-29	10-K	23-002596
23	cost of revenue	us-gaap:CostOfRevenue	$445.0M	2021-09-30	2023-11-29	10-K	23-002596
24	current assets	us-gaap:AssetsCurrent	$688.5M	2025-09-30	2025-12-01	10-K	25-117276
25	current liabilities	us-gaap:LiabilitiesCurrent	$508.1M	2025-09-30	2025-12-01	10-K	25-117276
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$1.4B	2025-09-30	2025-12-01	10-K	25-117276
27	liabilities	us-gaap:Liabilities	$869.5M	2025-09-30	2025-12-01	10-K	25-117276
28	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$75.0M	2025-09-30	2025-12-01	10-K	25-117276
29	interest expense	us-gaap:InterestExpense	$17.5M	2025-09-30	2025-12-01	10-K	25-117276
30	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$36.3M	2025-09-30	2025-12-01	10-K	25-117276
31	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$127.5M	2024-09-30	2025-12-01	10-K	25-117276

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32	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$28.3M	2024-09-30	2025-12-01	10-K	25-117276
33	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$76.9M	2023-09-30	2025-12-01	10-K	25-117276
34	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$19.7M	2023-09-30	2025-12-01	10-K	25-117276
35	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$135.3M	2022-09-30	2024-11-29	10-K	24-002064
36	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$32.1M	2022-09-30	2024-11-29	10-K	24-002064
37	current assets	us-gaap:AssetsCurrent	$668.6M	2024-09-30	2025-12-01	10-K	25-117276
38	current liabilities	us-gaap:LiabilitiesCurrent	$349.9M	2024-09-30	2025-12-01	10-K	25-117276
39	assets	us-gaap:Assets	$1.7B	2023-09-30	2024-11-29	10-K	24-002064
40	assets	us-gaap:Assets	$1.7B	2022-09-30	2023-11-29	10-K	23-002596
41	shares outstanding	dei:EntityCommonStockSharesOutstanding	25,846,125	2025-11-14	2025-12-01	10-K	25-117276
42	shares outstanding	dei:EntityCommonStockSharesOutstanding	25,785,481	2024-11-13	2024-11-29	10-K	24-002064

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