Mueller Industries Inc. MLI

NYSE; manufacturing; SIC 3350, Rolling Drawing & Extruding of Nonferrous Metals; CIK 0000089439

B

second fifth of 244 graded peers in manufacturing

rank 74 of 244; percentile 30.0; sampling error 3.0 points; lower is stronger

A B C D E

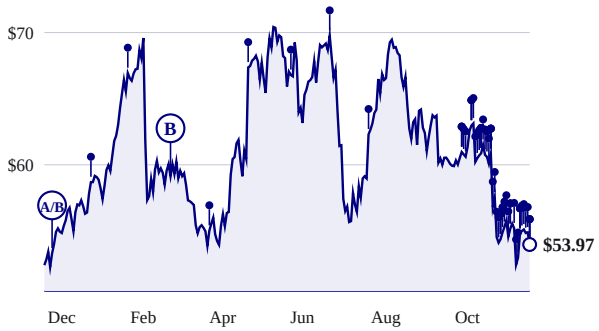
B, the elk



Scoreboard

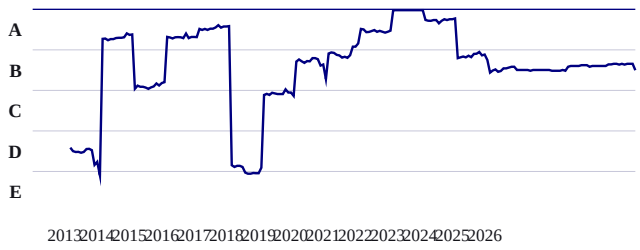
Profitability	E percentile 83.5
Solvency	A percentile 5.4
Growth and financing	B/C percentile 39.7
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $3.7B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered; fortress balance sheet
Inputs computable	8 of 13
Graded from	filings received through Feb 25, 2026 265 days before the rescan; latest periodic filing 10-Q received Oct 21, 2026
Last close	$53.97 2026-11-16; market equity $11.8B; 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 25, 2026

" and our other detailed discussion of risk factors included in this MD&A. We are a leading manufacturer of copper, brass, and aluminum products. The range of products we manufacture is broad: copper tube and fittings; line sets; brass rod, bar, and shapes; aluminum and brass forgings; aluminum impact extrusions; refrigeration valves and fittings; compressed gas valves; pressure vessels; steel nipples; insulated flexible duct systems; and high-quality wire and cable solutions. We also resell brass and plastic plumbing valves, plastic fittings, malleable iron fittings, faucets, and plumbing specialty products.

The thirteen 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 83.5						
Gross profitability	not computable	22.2%				
latest aligned inputs end 2020-12-26; latest annual assets end 2025-12-27						
Return on invested capital	not computable	9.8%				

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latest aligned inputs end 2022-12-31; latest annual assets end 2025-12-27						
Accruals ratio	0.3%	(3.7%)		83.5	285	2025-12-27
Gross margin stability, five years	not computable	2.1 pts				
five annual gross margins are required; found 3						
Solvency, sleeve percentile 5.4						
Altman Z double-prime	15.36	3.60		3.2	221	2025-12-27
Net debt to EBITDA	not computable	1.76x				
latest aligned inputs end 2022-12-31; latest annual assets end 2025-12-27						
Interest coverage	not computable	5.13x				
latest aligned inputs end 2023-12-30; latest annual assets end 2025-12-27						
Current ratio	5.92x	2.27x		7.7	300	2025-12-27
Growth and financing, sleeve percentile 39.7						
Revenue growth, three-year compound	1.6%	2.2%		53.7	260	2025-12-27
Free cash flow growth, three-year compound	0.02%	13.5%		75.7	137	2025-12-27
Reinvestment rate	57.8%	25.7%		32.6	136	2025-12-27
Asset growth, three years	18.5%	4.1%		13.3	264	2025-12-27
Net share issuance, one year	(2.0%)	0.0%		23.4	240	2026-02-18

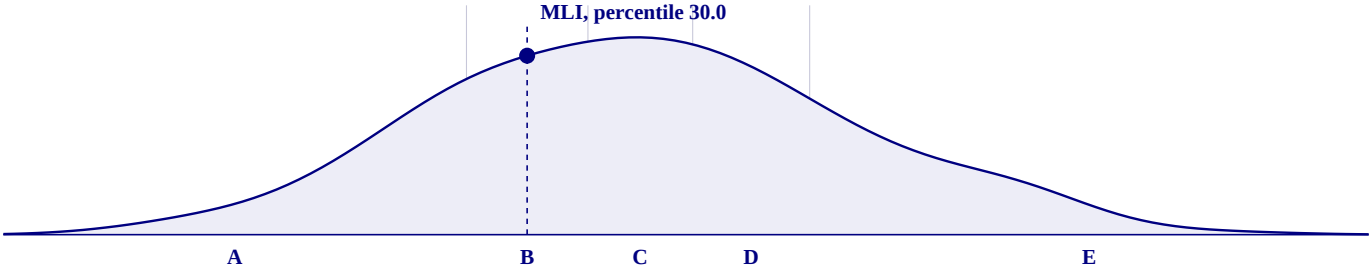
Warnings

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

Check	Measured
Fortress balance sheet	cash minus debt is 458,281,000 USD; Altman Z is not used

Among 244 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
69	Janus International Group, Inc. (JBI)	28.0	B	
70	Zurn Elkay Water Solutions Corp. (ZWS)	28.4	B	
71	CRH Public Ltd. Co. (CRH)	28.8	B	
72	Sturm Ruger & Co. Inc. (RGR)	29.2	B	
73	Smith & Wesson Brands, Inc. (SWBI)	29.6	B	
74	Mueller Industries Inc. (MLI)	30.0	B	fortress balance sheet
75	Twin Disc Inc. (TWIN)	30.5	B	
76	Flowserve Corp. (FLS)	30.9	B	
77	Core Molding Technologies Inc. (CMT)	31.3	B	fortress balance sheet
78	Lindsay Corp. (LNN)	31.7	B	fortress balance sheet
79	CPS Technologies (CPSH)	32.1	B	fortress balance sheet

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What the price implies

at the 2026-11-16 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	15.7%	9.9%	57
Distance from 52-week high	(23.4%)	(27.1%)	59
EBIT to enterprise value	9.3%	4.2%	89
Free cash flow yield	5.8%	3.6%	74
Book value to price	0.30	0.37	40
Sales to price	0.36	0.56	29
Composite equity issuance, five years	(12.3%)	(9.7%)	42
Relative strength against the sector, log excess return	0.06	0.01	57
Twelve-month failure probability, CHS model	0.02%	0.04%	4

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score None of 9, period end 2025-12-27	
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	pass
No new shares issued	pass
Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$1.4B
Operating cash flow, four quarters	$770.2M
Months of runway	not finite
Days since last periodic filing	27 (10-Q received Oct 21, 2026)
Median daily dollar volume, 63 sessions	$84.3M

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...	$2.4B	2020-12-26	2023-02-28	10-K	23-000016
2	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$2.0B	2020-12-26	2021-02-24	10-K	21-000015
3	assets	us-gaap:Assets	$1.5B	2020-12-26	2023-02-28	10-K	23-000016
4	operating income	us-gaap:OperatingIncomeLoss	$877.1M	2022-12-31	2025-02-26	10-K	25-000010
5	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$876.0M	2022-12-31	2025-02-26	10-K	25-000010
6	income tax	us-gaap:IncomeTaxExpenseBenefit	$223.3M	2022-12-31	2025-02-26	10-K	25-000010
7	total debt	us-gaap:LongTermDebt	$2.7M	2022-12-31	2023-02-28	10-K	23-000016
8	book equity	us-gaap:StockholdersEquity	$1.8B	2022-12-31	2024-02-28	10-K	24-000015
9	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$461.0M	2022-12-31	2024-02-28	10-K	24-000015
10	total debt	us-gaap:LongTermDebt	$2.9M	2021-12-25	2022-02-23	10-K	22-000013
11	book equity	us-gaap:StockholdersEquity	$1.2B	2021-12-25	2023-02-28	10-K	23-000016
12	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$87.9M	2021-12-25	2023-02-28	10-K	23-000016
13	net income	us-gaap:NetIncomeLoss	$765.2M	2025-12-27	2026-02-25	10-K	26-000008
14	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$755.4M	2025-12-27	2026-02-25	10-K	26-000008
15	assets	us-gaap:Assets	$3.7B	2025-12-27	2026-02-25	10-K	26-000008
16	assets	us-gaap:Assets	$3.3B	2024-12-28	2026-02-25	10-K	26-000008
17	current assets	us-gaap:AssetsCurrent	$2.4B	2025-12-27	2026-02-25	10-K	26-000008

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18	current liabilities	us-gaap:LiabilitiesCurrent	$413.1M	2025-12-27	2026-02-25	10-K	26-000008
19	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$3.8B	2025-12-27	2026-02-25	10-K	26-000008
20	operating income	us-gaap:OperatingIncomeLoss	$958.5M	2025-12-27	2026-02-25	10-K	26-000008
21	book equity	us-gaap:StockholdersEquity	$3.2B	2025-12-27	2026-02-25	10-K	26-000008
22	liabilities	us-gaap:Liabilities	$497.1M	2025-12-27	2026-02-25	10-K	26-000008
23	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$43.7M	2022-12-31	2025-02-26	10-K	25-000010
24	operating income	us-gaap:OperatingIncomeLoss	$756.1M	2023-12-30	2026-02-25	10-K	26-000008
25	interest expense	us-gaap:InterestExpense	$1.2M	2023-12-30	2024-02-28	10-K	24-000015
26	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.2B	2025-12-27	2026-02-25	10-K	26-000008
27	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$3.8B	2024-12-28	2026-02-25	10-K	26-000008
28	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$3.4B	2023-12-30	2026-02-25	10-K	26-000008
29	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.0B	2022-12-31	2025-02-26	10-K	25-000010
30	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$68.8M	2025-12-27	2026-02-25	10-K	26-000008
31	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$645.9M	2024-12-28	2026-02-25	10-K	26-000008
32	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$80.2M	2024-12-28	2026-02-25	10-K	26-000008
33	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$672.8M	2023-12-30	2026-02-25	10-K	26-000008
34	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$54.0M	2023-12-30	2026-02-25	10-K	26-000008
35	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$723.9M	2022-12-31	2025-02-26	10-K	25-000010
36	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$37.6M	2022-12-31	2025-02-26	10-K	25-000010
37	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$68.6M	2025-12-27	2026-02-25	10-K	26-000008
38	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$1.0B	2025-12-27	2026-02-25	10-K	26-000008
39	income tax	us-gaap:IncomeTaxExpenseBenefit	$247.4M	2025-12-27	2026-02-25	10-K	26-000008
40	current assets	us-gaap:AssetsCurrent	$2.0B	2024-12-28	2026-02-25	10-K	26-000008
41	current liabilities	us-gaap:LiabilitiesCurrent	$398.0M	2024-12-28	2026-02-25	10-K	26-000008
42	assets	us-gaap:Assets	$2.8B	2023-12-30	2026-02-25	10-K	26-000008
43	assets	us-gaap:Assets	$2.2B	2022-12-31	2025-02-26	10-K	25-000010
44	shares outstanding	dei:EntityCommonStockSharesOutstanding	110,964,294	2026-02-18	2026-02-25	10-K	26-000008
45	shares outstanding	dei:EntityCommonStockSharesOutstanding	113,267,514	2025-02-19	2025-02-26	10-K	25-000010

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