Timken Co.

TKR

NYSE; manufacturing; SIC 3562, Ball & Roller Bearings; CIK 0000098362

C

middle fifth of 244 graded peers in manufacturing

rank 136 of 244; percentile 55.6; sampling error 3.0 points; lower is stronger

A B C D E

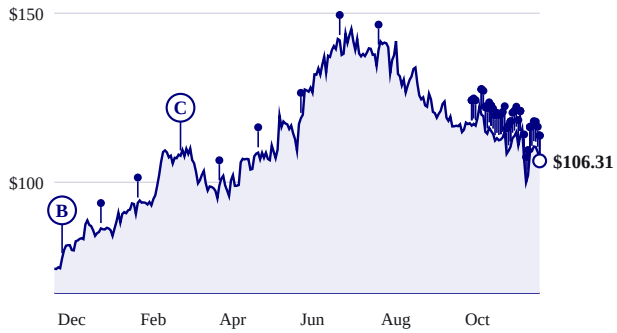
C, the tortoise



Scoreboard

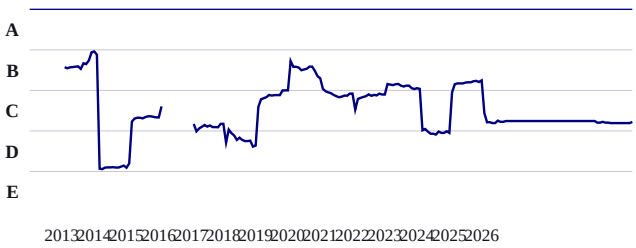
Profitability	C percentile 49.4
Solvency	C percentile 47.6
Growth and financing	C percentile 55.3
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $6.7B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress
Inputs computable	11 of 13
Graded from	filings received through Feb 13, 2026 277 days before the rescan; latest periodic filing 10-Q received Nov 4, 2026
Last close	$106.38 2026-11-16; market equity $7.3B; 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 13, 2026

As used herein, the term "Timken" or the "Company" refers to The Timken Company and its subsidiaries unless the context otherwise dictates. Timken designs and manages a portfolio of engineered bearings and industrial motion products, and provides related services. The Company's growing portfolio features many strong brands, including Timken®, GGB®, Philadelphia Gear®, Cone Drive®, CGI®, Rollon®, Nadella®, Rosa Sistemi®, Diamond®, Drives®, Groeneveld®, BEKA®, Des-Case®, Lovejoy®, PT Tech®, Torsion Control Products® and Lagersmit®. The Company was founded in 1899 by Henry Timken, who received two patents on the design of a tapered roller bearing.

The thirteen inputs

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

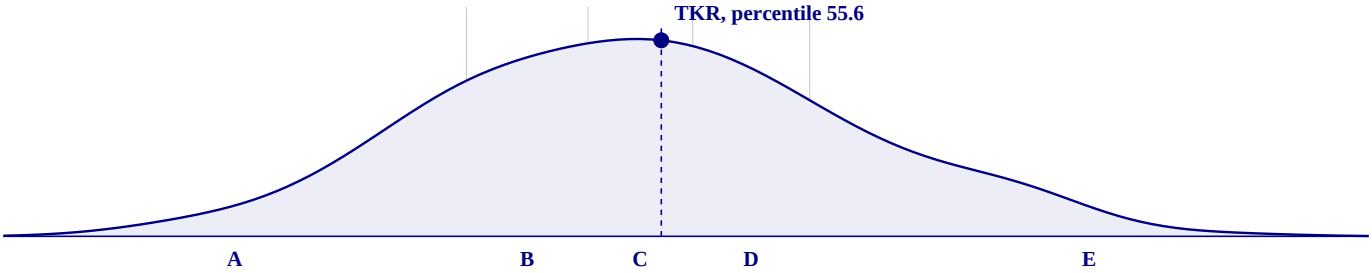
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 49.4						
Gross profitability	20.9%	22.2%		51.5	265	2025-12-31
Return on invested capital	8.9%	9.8%		55.2	97	2025-12-31

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Accruals ratio	(4.1%)	(3.7%)	48.2	285	2025-12-31
Gross margin stability, five years	1.9 pts	2.1 pts	42.7	221	2025-12-31
Solvency, sleeve percentile 47.6					
Altman Z double-prime	not computable	3.60			
one or more required annual facts are missing					
Net debt to EBITDA	1.99x	1.76x	60.3	117	2025-12-31
Interest coverage	not computable	5.13x			
latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31					
Current ratio	2.82x	2.27x	34.8	300	2025-12-31
Growth and financing, sleeve percentile 55.3					
Revenue growth, three-year compound	0.6%	2.2%	58.7	260	2025-12-31
Free cash flow growth, three-year compound	12.5%	13.5%	54.4	137	2025-12-31
Reinvestment rate	(24.2%)	25.7%	80.0	136	2025-12-31
Asset growth, three years	5.0%	4.1%	44.9	264	2025-12-31
Net share issuance, one year	(0.7%)	0.0%	38.5	240	2026-01-31

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
131	Gorman Rupp Co. (GRC)	53.5	C	
132	Owens Corning (OC)	53.9	C	
133	Greenland Technologies Holding Corp. (GTEC)	54.3	C	dilution, fortress balance sheet
134	General Dynamics Corp. (GD)	54.7	C	
135	Eastern Co. (EML)	55.1	C	
136	Timken Co. (TKR)	55.6	C	
137	Dover Corp. (DOV)	56.0	C	
138	Insteel Industries Inc. (IIIN)	56.4	C	
139	nVent Electric plc (NVT)	56.8	C	
140	Northern Technologies International Corp. (NTIC)	57.2	C/D	
141	RBC Bearings Inc. (RBC)	57.6	C/D	

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	50.7%	9.9%	80
Distance from 52-week high	(26.8%)	(27.1%)	50
EBIT to enterprise value	6.1%	4.2%	75
Free cash flow yield	5.6%	3.6%	71
Book value to price	0.44	0.37	56
Sales to price	0.63	0.56	55
Composite equity issuance, five years	(19.3%)	(9.7%)	24
Relative strength against the sector, log excess return	0.32	0.01	80

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Twelve-month failure probability, CHS model	not computable	0.04%

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 6 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	pass
Current ratio improved	fail
No new shares issued	pass
Gross margin improved	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$410.2M
Operating cash flow, four quarters	$585.8M
Months of runway	not finite
Days since last periodic filing	13 (10-Q received Nov 4, 2026)
Median daily dollar volume, 63 sessions	$94.2M

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	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.6B	2025-12-31	2026-02-13	10-K	26-000012
2	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$3.2B	2025-12-31	2026-02-13	10-K	26-000012
3	assets	us-gaap:Assets	$6.7B	2025-12-31	2026-02-13	10-K	26-000012
4	operating income	us-gaap:OperatingIncomeLoss	$540.6M	2025-12-31	2026-02-13	10-K	26-000012
5	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$416.0M	2025-12-31	2026-02-13	10-K	26-000012
6	income tax	us-gaap:IncomeTaxExpenseBenefit	$98.7M	2025-12-31	2026-02-13	10-K	26-000012
7	total debt	us-gaap:LongTermDebt	$1.9B	2025-12-31	2026-02-13	10-K	26-000012
8	book equity	us-gaap:StockholdersEquity	$3.2B	2025-12-31	2026-02-13	10-K	26-000012
9	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$364.4M	2025-12-31	2026-02-13	10-K	26-000012
10	total debt	us-gaap:LongTermDebt	$2.1B	2024-12-31	2026-02-13	10-K	26-000012
11	book equity	us-gaap:StockholdersEquity	$2.8B	2024-12-31	2026-02-13	10-K	26-000012
12	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$373.2M	2024-12-31	2026-02-13	10-K	26-000012
13	net income	us-gaap:NetIncomeLoss	$288.4M	2025-12-31	2026-02-13	10-K	26-000012
14	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$554.3M	2025-12-31	2026-02-13	10-K	26-000012
15	assets	us-gaap:Assets	$6.4B	2024-12-31	2026-02-13	10-K	26-000012
16	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.6B	2024-12-31	2026-02-13	10-K	26-000012
17	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$3.1B	2024-12-31	2026-02-13	10-K	26-000012
18	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.8B	2023-12-31	2026-02-13	10-K	26-000012
19	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$3.3B	2023-12-31	2026-02-13	10-K	26-000012
20	gross profit	us-gaap:GrossProfit	$1.3B	2022-12-31	2023-02-16	10-K	23-000040
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.5B	2022-12-31	2025-02-20	10-K	25-000055
22	gross profit	us-gaap:GrossProfit	$1.1B	2021-12-31	2023-02-16	10-K	23-000040
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.1B	2021-12-31	2024-02-26	10-K	24-000042
24	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$230.1M	2025-12-31	2026-02-13	10-K	26-000012
25	operating income	us-gaap:OperatingIncomeLoss	$657.1M	2023-12-31	2026-02-13	10-K	26-000012
26	interest expense	us-gaap:InterestExpense	$110.7M	2023-12-31	2024-02-26	10-K	24-000042
27	current assets	us-gaap:AssetsCurrent	$2.6B	2025-12-31	2026-02-13	10-K	26-000012
28	current liabilities	us-gaap:LiabilitiesCurrent	$922.1M	2025-12-31	2026-02-13	10-K	26-000012
29	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$148.2M	2025-12-31	2026-02-13	10-K	26-000012
30	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$475.7M	2024-12-31	2026-02-13	10-K	26-000012

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31	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$170.0M	2024-12-31	2026-02-13	10-K	26-000012
32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$545.2M	2023-12-31	2026-02-13	10-K	26-000012
33	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$187.8M	2023-12-31	2026-02-13	10-K	26-000012
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$463.8M	2022-12-31	2025-02-20	10-K	25-000055
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$178.4M	2022-12-31	2023-02-16	10-K	23-000040
36	current assets	us-gaap:AssetsCurrent	$2.5B	2024-12-31	2026-02-13	10-K	26-000012
37	current liabilities	us-gaap:LiabilitiesCurrent	$820.5M	2024-12-31	2026-02-13	10-K	26-000012
38	assets	us-gaap:Assets	$6.5B	2023-12-31	2025-02-20	10-K	25-000055
39	assets	us-gaap:Assets	$5.8B	2022-12-31	2024-02-26	10-K	24-000042
40	shares outstanding	dei:EntityCommonStockSharesOutstanding	69,544,299	2026-01-31	2026-02-13	10-K	26-000012
41	shares outstanding	dei:EntityCommonStockSharesOutstanding	70,001,123	2025-01-31	2025-02-20	10-K	25-000055

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