Coty Inc.

COTY

NYSE; chemicals; SIC 2844, Perfumes, Cosmetics & Other Toilet Preparations; CIK 0001024305

D/E

on the D/E boundary of 318 graded peers in the pooled indus...

rank 248 of 318; percentile 81.7; sampling error 2.7 points; lower is stronger

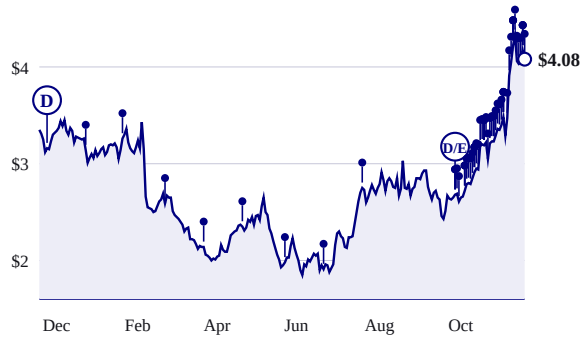


D/E, the sloth



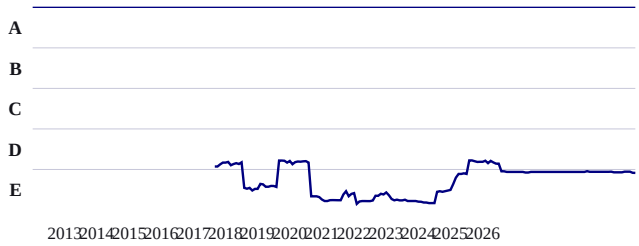
Scoreboard	
Profitability	B percentile 31.5
Solvency	E percentile 91.9
Growth and financing	D percentile 71.7
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $10.2B
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 Aug 20, 2026 90 days before the rescan; latest periodic filing 10-Q received Nov 5, 2026
Last close	$4.08 2026-11-17; market equity $3.6B; 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 Aug 20, 2026

Founded in 1904, Coty Inc. is one of the world's largest beauty companies with an iconic portfolio of brands across fragrance, color cosmetics, and skin and body care. We have been engaged in the process of strategic planning and portfolio assessment designed to position the Company for consistent, profitable growth. In September 2025, we announced a strategic review of the Company's consumer beauty business, including its mass color cosmetics business and associated brands and the Company's distinct Brazil business comprised of local Brazilian brands.

The thirteen inputs

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

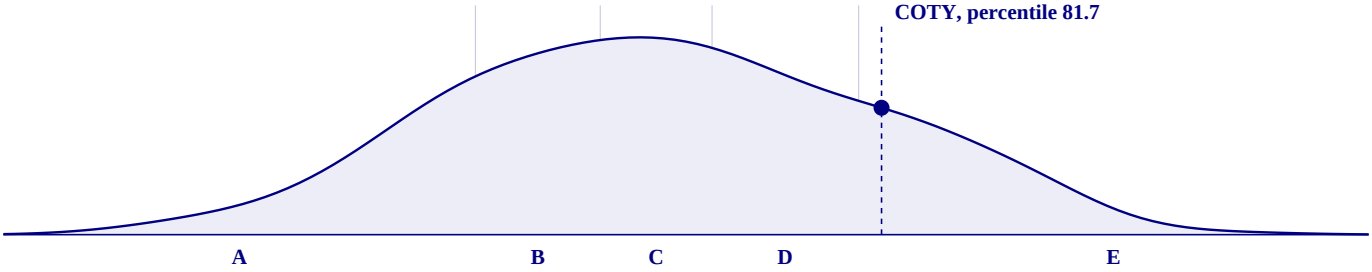
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 31.5						
Gross profitability	35.8%	21.8%		15.3	347	2026-06-30
Return on invested capital	(1.2%)	9.6%		86.8	122	2026-06-30
Accruals ratio	(10.3%)	(4.3%)		18.9	371	2026-06-30

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Gross margin stability, five years	0.7 pts	2.2 pts		5.2	292	2026-06-30
Solvency, sleeve percentile 91.9						
Altman Z double-prime	(1.87)	3.45		85.0	274	2026-06-30
Net debt to EBITDA	7.13x	1.83x		94.5	147	2026-06-30
Interest coverage	not computable	4.55x				
latest aligned inputs end 2023-06-30; latest annual assets end 2026-06-30						
Current ratio	0.75x	2.19x		96.2	391	2026-06-30
Growth and financing, sleeve percentile 71.7						
Revenue growth, three-year compound	1.5%	1.3%		49.0	340	2026-06-30
Free cash flow growth, three-year compound	(4.7%)	12.5%		76.8	178	2026-06-30
Reinvestment rate	not computable	21.5%				
NOPAT must exceed $100,000						
Asset growth, three years	(7.0%)	2.9%		85.6	349	2026-06-30
Net share issuance, one year	1.0%	0.0%		75.2	316	2026-08-12

Among 318 peers

chemicals; 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
243	Westlake Corp. (WLK)	80.1	D/E	
244	Regal Rexnord Corp. (RRX)	80.3	D/E	
245	Mercer International Inc. (MERC)	80.7	D/E	
246	Redwire Corp. (RDW)	81.1	D/E	dilution, fortress balance sheet
247	American Superconductor Corp. (AMSC)	81.6	D/E	
248	Coty Inc. (COTY)	81.7	D/E	
249	Fuelcell Energy Inc. (FCEL)	82.0	D/E	fortress balance sheet
250	Broadwind, Inc. (BWEN)	82.4	D/E	
251	American Vanguard Corp. (AVD)	82.6	D/E	late filer
252	Crane NXT, Co. (CXT)	82.8	D/E	
253	Innovate Corp. (VATE)	83.2	E	fortress balance sheet

What the price implies

at the 2026-11-17 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(34.3%)	11.0%	13
Distance from 52-week high	(5.8%)	(27.2%)	92
EBIT to enterprise value	(1.3%)	3.9%	20
Free cash flow yield	9.7%	3.4%	89
Book value to price	0.86	0.41	80
Sales to price	1.61	0.58	79
Composite equity issuance, five years	14.0%	(10.2%)	79
Relative strength against the sector, log excess return	(0.57)	(0.00)	11
Twelve-month failure probability, CHS model	not computable	0.04%	

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Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 3 of 9, period end 2026-06-30	
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	fail
No new shares issued	fail
Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$210.6M
Operating cash flow, four quarters	$603.0M
Months of runway	not finite
Days since last periodic filing	13 (10-Q received Nov 5, 2026)
Median daily dollar volume, 63 sessions	$15.7M

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	gross profit	us-gaap:GrossProfit	$3.7B	2026-06-30	2026-08-20	10-K	26-000048
2	assets	us-gaap:Assets	$10.2B	2026-06-30	2026-08-20	10-K	26-000048
3	operating income	us-gaap:OperatingIncomeLoss	-$81.5M	2026-06-30	2026-08-20	10-K	26-000048
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$610.2M	2026-06-30	2026-08-20	10-K	26-000048
5	income tax	us-gaap:IncomeTaxExpenseBenefit	-$20.0M	2026-06-30	2026-08-20	10-K	26-000048
6	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$3.0B	2026-06-30	2026-08-20	10-K	26-000048
7	book equity	us-gaap:StockholdersEquity	$3.0B	2026-06-30	2026-08-20	10-K	26-000048
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$176.1M	2026-06-30	2026-08-20	10-K	26-000048
9	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$4.0B	2025-06-30	2026-08-20	10-K	26-000048
10	book equity	us-gaap:StockholdersEquity	$3.5B	2025-06-30	2026-08-20	10-K	26-000048
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$257.1M	2025-06-30	2026-08-20	10-K	26-000048
12	net income	us-gaap:NetIncomeLoss	-$604.8M	2026-06-30	2026-08-20	10-K	26-000048
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$537.8M	2026-06-30	2026-08-20	10-K	26-000048
14	assets	us-gaap:Assets	$11.9B	2025-06-30	2026-08-20	10-K	26-000048
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$5.8B	2026-06-30	2026-08-20	10-K	26-000048
16	gross profit	us-gaap:GrossProfit	$3.8B	2025-06-30	2026-08-20	10-K	26-000048
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$5.9B	2025-06-30	2026-08-20	10-K	26-000048
18	gross profit	us-gaap:GrossProfit	$3.9B	2024-06-30	2026-08-20	10-K	26-000048
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$6.1B	2024-06-30	2026-08-20	10-K	26-000048
20	gross profit	us-gaap:GrossProfit	$3.5B	2023-06-30	2025-08-21	10-K	25-000030
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$5.6B	2023-06-30	2025-08-21	10-K	25-000030
22	gross profit	us-gaap:GrossProfit	$3.4B	2022-06-30	2024-08-20	10-K	24-000035
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$5.3B	2022-06-30	2024-08-20	10-K	24-000035
24	current assets	us-gaap:AssetsCurrent	$1.9B	2026-06-30	2026-08-20	10-K	26-000048
25	current liabilities	us-gaap:LiabilitiesCurrent	$2.5B	2026-06-30	2026-08-20	10-K	26-000048
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$5.9B	2026-06-30	2026-08-20	10-K	26-000048
27	liabilities	us-gaap:Liabilities	$6.8B	2026-06-30	2026-08-20	10-K	26-000048
28	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$482.2M	2026-06-30	2026-08-20	10-K	26-000048
29	operating income	us-gaap:OperatingIncomeLoss	$543.7M	2023-06-30	2025-08-21	10-K	25-000030
30	interest expense	us-gaap:InterestExpense	$261.1M	2023-06-30	2023-08-22	10-K	23-000060
31	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$189.6M	2026-06-30	2026-08-20	10-K	26-000048

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32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$492.6M	2025-06-30	2026-08-20	10-K	26-000048
33	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$215.0M	2025-06-30	2026-08-20	10-K	26-000048
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$614.6M	2024-06-30	2026-08-20	10-K	26-000048
35	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$245.2M	2024-06-30	2026-08-20	10-K	26-000048
36	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$625.7M	2023-06-30	2025-08-21	10-K	25-000030
37	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$222.8M	2023-06-30	2025-08-21	10-K	25-000030
38	current assets	us-gaap:AssetsCurrent	$2.0B	2025-06-30	2026-08-20	10-K	26-000048
39	current liabilities	us-gaap:LiabilitiesCurrent	$2.5B	2025-06-30	2026-08-20	10-K	26-000048
40	assets	us-gaap:Assets	$12.1B	2024-06-30	2025-08-21	10-K	25-000030
41	assets	us-gaap:Assets	$12.7B	2023-06-30	2024-08-20	10-K	24-000035
42	shares outstanding	dei:EntityCommonStockSharesOutstanding	880,686,464	2026-08-12	2026-08-20	10-K	26-000048
43	shares outstanding	dei:EntityCommonStockSharesOutstanding	872,294,977	2025-08-12	2025-08-21	10-K	25-000030

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