Flowserve Corp.

FLS

NYSE; manufacturing; SIC 3561, Pumps & Pumping Equipment; CIK 0000030625

B

second fifth of 245 graded peers in manufacturing

rank 76 of 245; percentile 30.7; sampling error 3.0 points; lower is stronger

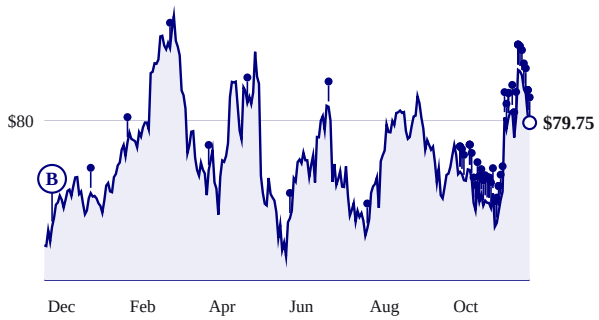
A B C D E

B, the elk



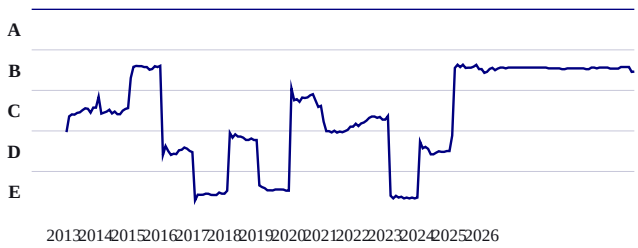
Scoreboard	
Profitability	C percentile 45.9
Solvency	C percentile 50.8
Growth and financing	B percentile 30.9
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $5.7B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: short runway, distress
Inputs computable	11 of 13
Graded from	filings received through Feb 17, 2026 274 days before the rescan; latest periodic filing 10-Q received Oct 28, 2026
Last close	$79.74 2026-11-17; market equity $10.1B; 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 17, 2026

Unless the context otherwise indicates, references to "Flowserve," "the Company" and such words as "we," "our" and "us" include Flowserve Corporation and its subsidiaries. Flowserve's goal is to create extraordinary flow control solutions to make the world better for everyone. We are a world-leading manufacturer and aftermarket service provider of comprehensive flow control systems. We develop and manufacture precision-engineered flow control equipment integral to the movement, control and protection of the flow of materials in our customers' critical processes.

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 45.9						
Gross profitability	27.7%	22.2%		26.8	266	2025-12-31
Return on invested capital	9.6%	9.9%		52.6	98	2025-12-31
Accruals ratio	(2.8%)	(3.7%)		57.9	286	2025-12-31

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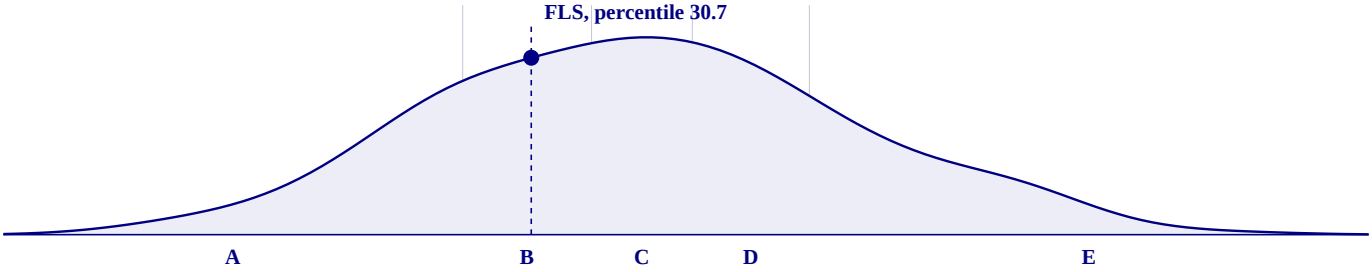
Gross margin stability, five years	2.0 pts	2.1 pts	46.2	222	2025-12-31
Solvency, sleeve percentile 50.8					
Altman Z double-prime	not computable	3.73			
latest aligned inputs end 2014-12-31; latest annual assets end 2025-12-31					
Net debt to EBITDA	1.64x	1.75x	47.9	118	2025-12-31
Interest coverage	5.14x	5.13x	48.3	59	2025-12-31
Current ratio	2.03x	2.26x	56.3	301	2025-12-31
Growth and financing, sleeve percentile 30.9					
Revenue growth, three-year compound	9.4%	2.2%	25.4	261	2025-12-31
Free cash flow growth, three-year compound	not computable	13.5%			
current FCF must be positive and base FCF must exceed $100,000					
Reinvestment rate	28.4%	25.7%	46.7	138	2025-12-31
Asset growth, three years	6.0%	4.2%	39.8	265	2025-12-31
Net share issuance, one year	(3.4%)	0.0%	11.7	241	2026-02-12

Among 245 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
71	Sturm Ruger & Co. Inc. (RGR)	28.7	B	
72	Smith & Wesson Brands, Inc. (SWBI)	29.1	B	
73	CRH Public Ltd. Co. (CRH)	29.5	B	
74	Mueller Industries Inc. (MLI)	29.9	B	fortress balance sheet
75	Core Molding Technologies Inc. (CMT)	30.3	B	fortress balance sheet
76	Flowserve Corp. (FLS)	30.7	B	
77	Twin Disc Inc. (TWIN)	31.1	B	
78	CPS Technologies (CPSH)	31.6	B	fortress balance sheet
79	Lindsay Corp. (LNN)	32.0	B	fortress balance sheet
80	Aaon, Inc. (AAON)	32.4	B	
81	Snap-on Inc. (SNA)	32.8	B	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	8.4%	9.9%	48
Distance from 52-week high	(13.4%)	(29.0%)	80
EBIT to enterprise value	3.7%	4.3%	42
Free cash flow yield	4.3%	3.6%	58
Book value to price	0.23	0.37	27
Sales to price	0.47	0.57	40
Composite equity issuance, five years	(13.9%)	(9.7%)	37
Relative strength against the sector, log excess return	(0.00)	0.01	48
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 8 of 9, period end 2025-12-31	
Return on assets above zero	pass
Operating cash flow above zero	pass
Return on assets improved	pass
Operating cash flow exceeds net income	pass
Long-term leverage fell	pass
Current ratio improved	pass
No new shares issued	pass
Gross margin improved	pass
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	n/a
Operating cash flow, four quarters	n/a
Months of runway	not finite
Days since last periodic filing	21 (10-Q received Oct 28, 2026)
Median daily dollar volume, 63 sessions	$118.2M

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	gross profit	us-gaap:GrossProfit	$1.6B	2025-12-31	2026-02-17	10-K	26-000003
2	assets	us-gaap:Assets	$5.7B	2025-12-31	2026-02-17	10-K	26-000003
3	operating income	us-gaap:OperatingIncomeLoss	$399.9M	2025-12-31	2026-02-17	10-K	26-000003
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$525.4M	2025-12-31	2026-02-17	10-K	26-000003
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$155.6M	2025-12-31	2026-02-17	10-K	26-000003
6	total debt	us-gaap:LongTermDebt	$1.6B	2025-12-31	2026-02-17	10-K	26-000003
7	book equity	us-gaap:StockholdersEquity	$2.2B	2025-12-31	2026-02-17	10-K	26-000003
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$760.2M	2025-12-31	2026-02-17	10-K	26-000003
9	total debt	us-gaap:LongTermDebt	$1.5B	2024-12-31	2025-02-26	10-K	25-000039
10	book equity	us-gaap:StockholdersEquity	$2.0B	2024-12-31	2026-02-17	10-K	26-000003
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$675.4M	2024-12-31	2026-02-17	10-K	26-000003
12	net income	us-gaap:NetIncomeLoss	$346.2M	2025-12-31	2026-02-17	10-K	26-000003
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$505.9M	2025-12-31	2026-02-17	10-K	26-000003
14	assets	us-gaap:Assets	$5.5B	2024-12-31	2026-02-17	10-K	26-000003
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.7B	2025-12-31	2026-02-17	10-K	26-000003
16	gross profit	us-gaap:GrossProfit	$1.4B	2024-12-31	2026-02-17	10-K	26-000003
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.6B	2024-12-31	2026-02-17	10-K	26-000003
18	gross profit	us-gaap:GrossProfit	$1.3B	2023-12-31	2026-02-17	10-K	26-000003
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.3B	2023-12-31	2026-02-17	10-K	26-000003
20	gross profit	us-gaap:GrossProfit	$994.3M	2022-12-31	2025-02-26	10-K	25-000039
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$3.6B	2022-12-31	2025-02-26	10-K	25-000039
22	gross profit	us-gaap:GrossProfit	$1.0B	2021-12-31	2024-02-20	10-K	24-000025
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$3.5B	2021-12-31	2024-02-20	10-K	24-000025
24	current assets	us-gaap:AssetsCurrent	$2.8B	2014-12-31	2016-02-18	10-K	16-000121
25	current liabilities	us-gaap:LiabilitiesCurrent	$1.5B	2014-12-31	2016-02-18	10-K	16-000121
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$3.4B	2014-12-31	2016-02-18	10-K	16-000121
27	operating income	us-gaap:OperatingIncomeLoss	$785.4M	2014-12-31	2017-08-11	10-K/A	17-000115
28	book equity	us-gaap:StockholdersEquity	$1.9B	2014-12-31	2016-02-18	10-K	16-000121
29	assets	us-gaap:Assets	$4.8B	2014-12-31	2017-08-11	10-K/A	17-000115
30	liabilities	us-gaap:Liabilities	$3.0B	2014-12-31	2015-02-17	10-K	15-000021
31	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$95.5M	2025-12-31	2026-02-17	10-K	26-000003

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32	interest expense	us-gaap:InterestExpense	$77.7M	2025-12-31	2026-02-17	10-K	26-000003
33	current assets	us-gaap:AssetsCurrent	$3.0B	2025-12-31	2026-02-17	10-K	26-000003
34	current liabilities	us-gaap:LiabilitiesCurrent	$1.5B	2025-12-31	2026-02-17	10-K	26-000003
35	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$70.9M	2025-12-31	2026-02-17	10-K	26-000003
36	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$425.3M	2024-12-31	2026-02-17	10-K	26-000003
37	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$81.0M	2024-12-31	2026-02-17	10-K	26-000003
38	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$325.8M	2023-12-31	2026-02-17	10-K	26-000003
39	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$67.4M	2023-12-31	2026-02-17	10-K	26-000003
40	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$40.0M	2022-12-31	2025-02-26	10-K	25-000039
41	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$76.3M	2022-12-31	2025-02-26	10-K	25-000039
42	current assets	us-gaap:AssetsCurrent	$2.9B	2024-12-31	2026-02-17	10-K	26-000003
43	current liabilities	us-gaap:LiabilitiesCurrent	$1.5B	2024-12-31	2026-02-17	10-K	26-000003
44	assets	us-gaap:Assets	$5.1B	2023-12-31	2026-02-17	10-K	26-000003
45	assets	us-gaap:Assets	$4.8B	2022-12-31	2025-02-26	10-K	25-000039
46	shares outstanding	dei:EntityCommonStockSharesOutstanding	127,260,329	2026-02-12	2026-02-17	10-K	26-000003
47	shares outstanding	dei:EntityCommonStockSharesOutstanding	131,745,177	2025-02-21	2025-02-26	10-K	25-000039

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