Enpro Inc.

NPO

NYSE; manufacturing; SIC 3050, Gaskets, Packg & Sealg Devices & Rubber & Plastics Hose; CIK 0001164863

C/D

on the C/D boundary of 245 graded peers in manufacturing

rank 151 of 245; percentile 61.5; sampling error 3.0 points; lower is stronger

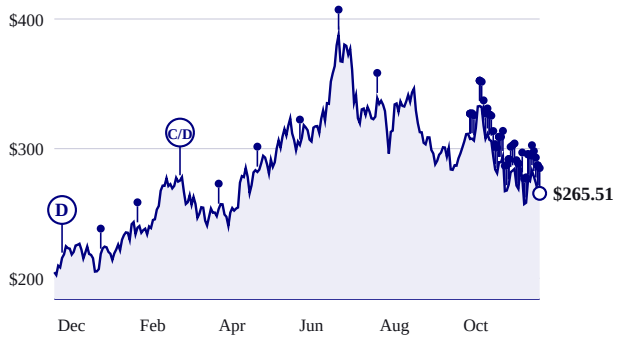
A B C D E

C/D, the tortoise



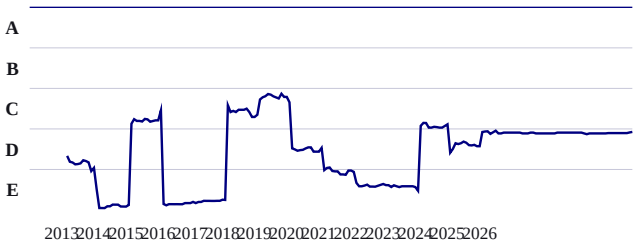
Scoreboard	
Profitability	C percentile 48.8
Solvency	C percentile 50.0
Growth and financing	C/D percentile 61.0
Reliability	0.91 AUC filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025
Peer failure rate	1.01% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$591M to $2.67B assets total assets $2.7B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress
Inputs computable	12 of 13
Graded from	filings received through Feb 19, 2026 272 days before the rescan; latest periodic filing 10-Q received Nov 3, 2026
Last close	$265.48 2026-11-17; market equity $5.6B; 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 Feb 19, 2026

As used in this report, the terms "we," "us," "our," "Enpro" and "Company" mean Enpro Inc. and its subsidiaries (unless the context indicates another meaning). The term "common stock" means the common stock of Enpro Inc., par value $0.01 per share. Enpro was incorporated under the laws of the State of North Carolina on January 11, 2002, as a wholly owned subsidiary of Goodrich Corporation ("Goodrich"). The incorporation was organized in connection with Goodrich's spin-off of its Engineered Industrial Products segment effected, by a distribution of the Company's common stock to existing Goodrich shareholders. The distribution took place on May 31, 2002. Today, Enpro Inc.

The thirteen inputs

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

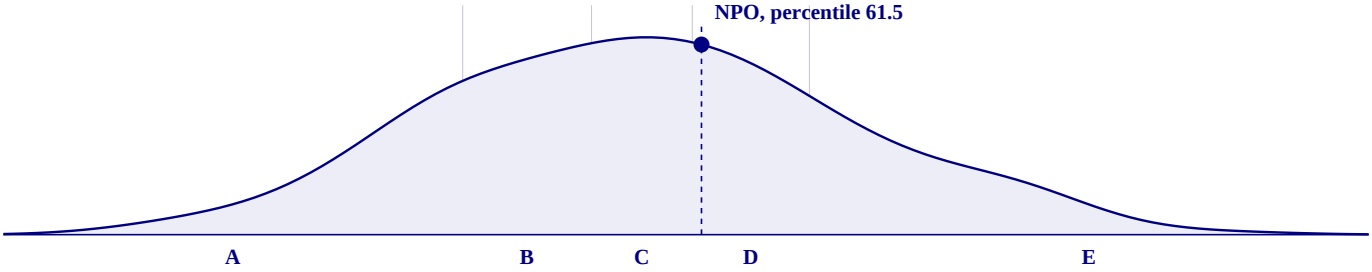
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 48.8						
Gross profitability	18.3%	22.2%		58.1	266	2025-12-31
Return on invested capital	5.8%	9.9%		71.1	98	2025-12-31

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Accruals ratio	(6.2%)	(3.7%)	30.2	286	2025-12-31
Gross margin stability, five years	1.7 pts	2.1 pts	35.7	222	2025-12-31
Solvency, sleeve percentile 50.0					
Altman Z double-prime	3.93	3.73	40.7	222	2025-12-31
Net debt to EBITDA	2.04x	1.75x	62.4	118	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	2.32x	2.26x	47.0	301	2025-12-31
Growth and financing, sleeve percentile 61.0					
Revenue growth, three-year compound	1.3%	2.2%	55.8	261	2025-12-31
Free cash flow growth, three-year compound	27.6%	13.5%	29.0	139	2025-12-31
Reinvestment rate	(111.0%)	25.7%	94.2	138	2025-12-31
Asset growth, three years	0.2%	4.2%	67.4	265	2025-12-31
Net share issuance, one year	0.3%	0.0%	58.8	241	2026-02-05

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
146	Lockheed Martin Corp. (LMT)	59.4	C/D	
147	Lifetime Brands, Inc. (LCUT)	59.8	C/D	
148	FreightCar America, Inc. (RAIL)	60.2	C/D	
149	DMC Global Inc. (BOOM)	60.7	C/D	
150	Corning Inc. (GLW)	61.1	C/D	
151	Enpro Inc. (NPO)	61.5	C/D	
152	Tecogen Inc. (TGEN)	61.9	C/D	
153	Reynolds Consumer Products Inc. (REYN)	62.3	C/D	
154	Sonoco Products Co. (SON)	62.7	C/D	
155	Materion Corp. (MTRN)	63.1	D	
156	HNI Corp. (HNI)	63.5	D	dilution

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	32.6%	9.9%	69
Distance from 52-week high	(31.5%)	(29.0%)	45
EBIT to enterprise value	2.6%	4.3%	34
Free cash flow yield	2.8%	3.6%	40
Book value to price	0.29	0.37	37
Sales to price	0.20	0.57	12
Composite equity issuance, five years	(3.0%)	(9.7%)	59
Relative strength against the sector, log excess return	0.20	0.01	69
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 5 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	fail
Current ratio improved	fail
No new shares issued	fail
Gross margin improved	pass
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$83.4M
Operating cash flow, four quarters	$235.5M
Months of runway	not finite
Days since last periodic filing	15 (10-Q received Nov 3, 2026)
Median daily dollar volume, 63 sessions	$49.6M

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	$487.5M	2025-12-31	2026-02-19	10-K	26-009798
2	assets	us-gaap:Assets	$2.7B	2025-12-31	2026-02-19	10-K	26-009798
3	operating income	us-gaap:OperatingIncomeLoss	$161.6M	2025-12-31	2026-02-19	10-K	26-009798
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$57.6M	2025-12-31	2026-02-19	10-K	26-009798
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$17.1M	2025-12-31	2026-02-19	10-K	26-009798
6	total debt	us-gaap:LongTermDebt	$655.3M	2025-12-31	2026-02-19	10-K	26-009798
7	book equity	us-gaap:StockholdersEquity	$1.5B	2025-12-31	2026-02-19	10-K	26-009798
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$114.7M	2025-12-31	2026-02-19	10-K	26-009798
9	total debt	us-gaap:LongTermDebt	$640.1M	2024-12-31	2026-02-19	10-K	26-009798
10	book equity	us-gaap:StockholdersEquity	$1.4B	2024-12-31	2026-02-19	10-K	26-009798
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$236.3M	2024-12-31	2026-02-19	10-K	26-009798
12	net income	us-gaap:NetIncomeLoss	$40.5M	2025-12-31	2026-02-19	10-K	26-009798
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesC...	$201.2M	2025-12-31	2026-02-19	10-K	26-009798
14	assets	us-gaap:Assets	$2.5B	2024-12-31	2026-02-19	10-K	26-009798
15	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$1.1B	2025-12-31	2026-02-19	10-K	26-009798
16	gross profit	us-gaap:GrossProfit	$444.8M	2024-12-31	2026-02-19	10-K	26-009798
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.0B	2024-12-31	2025-02-21	10-K	25-000009
18	gross profit	us-gaap:GrossProfit	$426.8M	2023-12-31	2026-02-19	10-K	26-009798
19	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$1.1B	2023-12-31	2026-02-19	10-K	26-009798
20	gross profit	us-gaap:GrossProfit	$423.3M	2022-12-31	2025-02-21	10-K	25-000009
21	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$1.1B	2022-12-31	2025-02-21	10-K	25-000009
22	gross profit	us-gaap:GrossProfit	$328.1M	2021-12-31	2024-02-27	10-K	24-000015
23	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$840.4M	2021-12-31	2024-02-27	10-K	24-000015
24	current assets	us-gaap:AssetsCurrent	$437.7M	2025-12-31	2026-02-19	10-K	26-009798
25	current liabilities	us-gaap:LiabilitiesCurrent	$188.7M	2025-12-31	2026-02-19	10-K	26-009798
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$1.2B	2025-12-31	2026-02-19	10-K	26-009798
27	liabilities	us-gaap:Liabilities	$1.1B	2025-12-31	2026-02-19	10-K	26-009798
28	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$102.8M	2025-12-31	2026-02-19	10-K	26-009798
29	operating income	us-gaap:OperatingIncomeLoss	$76.8M	2023-12-31	2026-02-19	10-K	26-009798
30	interest expense	us-gaap:InterestExpense	$45.0M	2023-12-31	2024-02-27	10-K	24-000015
31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$42.0M	2025-12-31	2026-02-19	10-K	26-009798

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32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesC...	$162.9M	2024-12-31	2026-02-19	10-K	26-009798
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$29.1M	2024-12-31	2026-02-19	10-K	26-009798
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesC...	$208.4M	2023-12-31	2026-02-19	10-K	26-009798
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$33.9M	2023-12-31	2026-02-19	10-K	26-009798
36	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesC...	$106.1M	2022-12-31	2025-02-21	10-K	25-000009
37	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$29.4M	2022-12-31	2025-02-21	10-K	25-000009
38	current assets	us-gaap:AssetsCurrent	$512.3M	2024-12-31	2026-02-19	10-K	26-009798
39	current liabilities	us-gaap:LiabilitiesCurrent	$198.0M	2024-12-31	2026-02-19	10-K	26-009798
40	assets	us-gaap:Assets	$2.5B	2023-12-31	2025-02-21	10-K	25-000009
41	assets	us-gaap:Assets	$2.6B	2022-12-31	2024-02-27	10-K	24-000015
42	shares outstanding	dei:EntityCommonStockSharesOutstanding	21,248,001	2026-02-05	2026-02-19	10-K	26-009798
43	shares outstanding	dei:EntityCommonStockSharesOutstanding	21,190,297	2025-02-05	2025-02-21	10-K	25-000009

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