# Somnigroup International Inc.

**SGI**

NYSE; consumer durables; SIC 2510, Household Furniture; CIK 0001206264

**C**

**middle fifth of 428 graded peers in the pooled consumer group**

rank 246 of 428; percentile 57.6; sampling error 2.4 points; lower is stronger

A B C D E

**C, the tortoise**



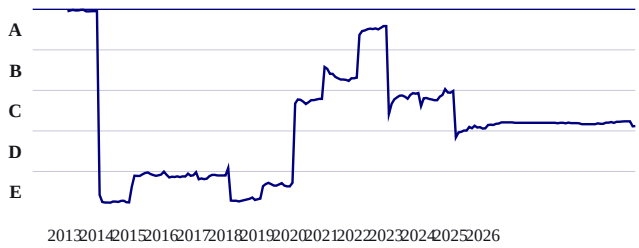
| Scoreboard | |
|---|---|
| **Profitability** | C<br>percentile 50.7 |
| **Solvency** | D<br>percentile 68.4 |
| **Growth and financing** | B<br>percentile 35.1 |
| **Reliability** | 0.94 AUC<br>filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025 |
| **Peer failure rate** | 0.52% a year<br>Item 1.03 bankruptcies, same asset band, 2012 to 2025 |
| **Size band** | over $2.67B assets<br>total assets $11.6B |
| **Standard universe** | inside<br>revenue above $1M and assets above $10M |
| **Warnings** | none triggered<br>not computable: short runway, distress |
| **Inputs computable** | 10 of 13 |
| **Graded from** | filings received through Feb 27, 2026<br>264 days before the rescan; latest periodic filing 10-Q received Nov 9, 2026 |
| **Last close** | $58.14<br>2026-11-17; market equity $13.4B; 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 27, 2026*

Somnigroup is the world's largest bedding company, dedicated to enriching people's lives through the power of a good night's sleep and transforming how the world sleeps. With superior capabilities in design, manufacturing, distribution and retail, we deliver breakthrough sleep solutions and serve the evolving needs of consumers in over 100 countries worldwide through our fully-owned businesses, Tempur Sealy, Mattress Firm and Dreams.

## 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 50.7** | | | | | | |
| Gross profitability | 27.4% | 35.0% | | 60.5 | 439 | 2025-12-31 |
| Return on invested capital | not computable | 9.2% | | | | |
| *latest aligned inputs end 2022-12-31; latest annual assets end 2025-12-31* | | | | | | |
| Accruals ratio | (4.7%) | (5.1%) | | 56.9 | 486 | 2025-12-31 |

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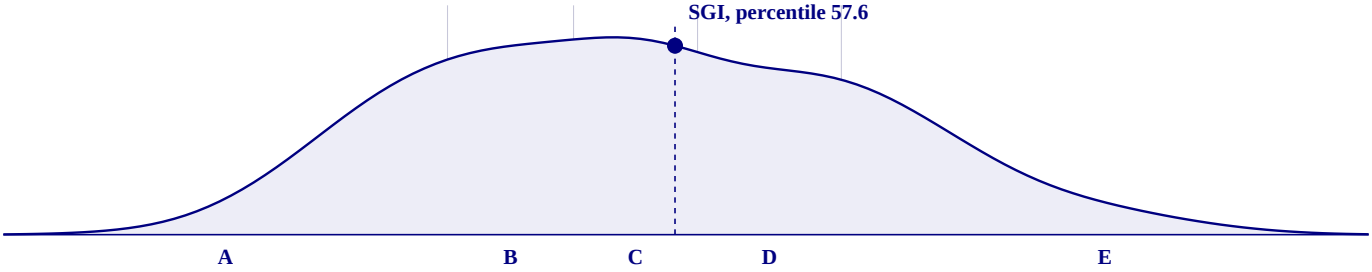
| | | | | | |
|---|---|---|---|---|---|
| Gross margin stability, five years | 1.2 pts | 1.7 pts | 34.7 | 378 | 2025-12-31 |
| **Solvency, sleeve percentile 68.4** | | | | | |
| Altman Z double-prime | 1.74 | 2.13 | 52.5 | 374 | 2025-12-31 |
| Net debt to EBITDA | not computable | 2.09x | | | |
| *latest aligned inputs end 2022-12-31; latest annual assets end 2025-12-31* | | | | | |
| Interest coverage | not computable | 2.97x | | | |
| *latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31* | | | | | |
| Current ratio | 0.83x | 1.56x | 84.2 | 500 | 2025-12-31 |
| **Growth and financing, sleeve percentile 35.1** | | | | | |
| Revenue growth, three-year compound | 15.0% | 1.5% | 7.8 | 447 | 2025-12-31 |
| Free cash flow growth, three-year compound | 106.1% | 7.1% | 4.3 | 233 | 2025-12-31 |
| Reinvestment rate | (82.7%) | 18.0% | 90.3 | 248 | 2025-12-31 |
| Asset growth, three years | 38.6% | 2.0% | 2.0 | 449 | 2025-12-31 |
| Net share issuance, one year | 0.9% | (0.3%) | 71.1 | 378 | 2026-02-23 |

## Among 428 peers

*consumer durables; 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 |
|---|---|---|---|---|
| 241 | Helen OF Troy Ltd. (HELE) | 56.4 | C | |
| 242 | Barnes & Noble Education, Inc. (BNED) | 56.5 | C | late filer |
| 243 | BlueLinx Holdings Inc. (BXC) | 56.9 | C | |
| 244 | Darling Ingredients Inc. (DAR) | 57.3 | C/D | |
| 245 | Autozone Inc. (AZO) | 57.3 | C/D | |
| 246 | Somnigroup International Inc. (SGI) | 57.6 | C | |
| 247 | Starbucks Corp. (SBUX) | 57.7 | C/D | |
| 248 | Rocky Brands, Inc. (RCKY) | 58.1 | C/D | |
| 249 | Kroger Co. (KR) | 58.2 | C/D | |
| 250 | Distribution Solutions Group, Inc. (DSGR) | 58.6 | C/D | |
| 251 | Jakks Pacific Inc. (JAKK) | 59.0 | C/D | 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 | (21.0%) | (1.6%) | 30 |
| Distance from 52-week high | (40.7%) | (23.8%) | 28 |
| EBIT to enterprise value | 4.1% | 4.9% | 43 |
| Free cash flow yield | 4.7% | 4.4% | 52 |
| Book value to price | 0.35 | 0.46 | 40 |
| Sales to price | 0.56 | 1.46 | 20 |
| Composite equity issuance, five years | 5.6% | (16.9%) | 81 |
| Relative strength against the sector, log excess return | (0.15) | 0.03 | 34 |
| 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 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 | fail |
| Gross margin improved | pass |
| Asset turnover improved | pass |
| **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 | 9 (10-Q received Nov 9, 2026) |
| Median daily dollar volume, 63 sessions | $195.0M |

## 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 | $3.2B | 2025-12-31 | 2026-02-27 | 10-K | 26-000015 |
| 2 | assets | us-gaap:Assets | $11.6B | 2025-12-31 | 2026-02-27 | 10-K | 26-000015 |
| 3 | operating income | us-gaap:OperatingIncomeLoss | $680.6M | 2022-12-31 | 2025-02-28 | 10-K | 25-000058 |
| 4 | pretax income | us-gaap:IncomeLossFromContinuingOperationsBeforeInc... | $577.2M | 2022-12-31 | 2024-02-16 | 10-K | 24-000050 |
| 5 | income tax | us-gaap:IncomeTaxExpenseBenefit | $119.0M | 2022-12-31 | 2025-02-28 | 10-K | 25-000058 |
| 6 | total debt | us-gaap:LongTermDebtAndCapitalLeaseObligations | $2.7B | 2022-12-31 | 2024-02-16 | 10-K | 24-000050 |
| 7 | book equity | us-gaap:StockholdersEquityIncludingPortionAttributableT... | -$22.1M | 2022-12-31 | 2026-02-27 | 10-K | 26-000015 |
| 8 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $69.4M | 2022-12-31 | 2023-02-17 | 10-K | 23-000060 |
| 9 | total debt | us-gaap:LongTermDebtAndCapitalLeaseObligations | $2.3B | 2021-12-31 | 2023-02-17 | 10-K | 23-000060 |
| 10 | book equity | us-gaap:StockholdersEquity | $285.8M | 2021-12-31 | 2022-02-22 | 10-K | 22-000057 |
| 11 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $300.7M | 2021-12-31 | 2023-02-17 | 10-K | 23-000060 |
| 12 | net income | us-gaap:NetIncomeLoss | $384.1M | 2025-12-31 | 2026-02-27 | 10-K | 26-000015 |
| 13 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $800.1M | 2025-12-31 | 2026-02-27 | 10-K | 26-000015 |
| 14 | assets | us-gaap:Assets | $6.0B | 2024-12-31 | 2026-02-27 | 10-K | 26-000015 |
| 15 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $7.5B | 2025-12-31 | 2026-02-27 | 10-K | 26-000015 |
| 16 | gross profit | us-gaap:GrossProfit | $2.0B | 2024-12-31 | 2026-02-27 | 10-K | 26-000015 |
| 17 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $4.9B | 2024-12-31 | 2026-02-27 | 10-K | 26-000015 |
| 18 | gross profit | us-gaap:GrossProfit | $2.0B | 2023-12-31 | 2026-02-27 | 10-K | 26-000015 |
| 19 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $4.9B | 2023-12-31 | 2026-02-27 | 10-K | 26-000015 |
| 20 | gross profit | us-gaap:GrossProfit | $2.0B | 2022-12-31 | 2025-02-28 | 10-K | 25-000058 |
| 21 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $4.9B | 2022-12-31 | 2025-02-28 | 10-K | 25-000058 |
| 22 | gross profit | us-gaap:GrossProfit | $2.2B | 2021-12-31 | 2024-02-16 | 10-K | 24-000050 |
| 23 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $4.9B | 2021-12-31 | 2024-02-16 | 10-K | 24-000050 |
| 24 | current assets | us-gaap:AssetsCurrent | $1.3B | 2025-12-31 | 2026-02-27 | 10-K | 26-000015 |
| 25 | current liabilities | us-gaap:LiabilitiesCurrent | $1.6B | 2025-12-31 | 2026-02-27 | 10-K | 26-000015 |
| 26 | retained earnings | us-gaap:RetainedEarningsAccumulatedDeficit | $3.8B | 2025-12-31 | 2026-02-27 | 10-K | 26-000015 |
| 27 | operating income | us-gaap:OperatingIncomeLoss | $754.9M | 2025-12-31 | 2026-02-27 | 10-K | 26-000015 |
| 28 | book equity | us-gaap:StockholdersEquityIncludingPortionAttributableT... | $3.1B | 2025-12-31 | 2026-02-27 | 10-K | 26-000015 |
| 29 | liabilities | us-gaap:Liabilities | $8.5B | 2025-12-31 | 2026-02-27 | 10-K | 26-000015 |
| 30 | depreciation amortization | us-gaap:DepreciationDepletionAndAmortization | $180.2M | 2022-12-31 | 2025-02-28 | 10-K | 25-000058 |
| 31 | operating income | us-gaap:OperatingIncomeLoss | $607.2M | 2023-12-31 | 2026-02-27 | 10-K | 26-000015 |

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| | | | | | | | |
|---|---|---|---|---|---|---|---|
| 32 | interest expense | us-gaap:InterestExpense | $129.9M | 2023-12-31 | 2024-02-16 | 10-K | 24-000050 |
| 33 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $166.9M | 2025-12-31 | 2026-02-27 | 10-K | 26-000015 |
| 34 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivitiesC... | $666.5M | 2024-12-31 | 2025-02-28 | 10-K | 25-000058 |
| 35 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $97.3M | 2024-12-31 | 2026-02-27 | 10-K | 26-000015 |
| 36 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivitiesC... | $570.3M | 2023-12-31 | 2025-02-28 | 10-K | 25-000058 |
| 37 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $185.4M | 2023-12-31 | 2026-02-27 | 10-K | 26-000015 |
| 38 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $378.8M | 2022-12-31 | 2023-02-17 | 10-K | 23-000060 |
| 39 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $306.5M | 2022-12-31 | 2025-02-28 | 10-K | 25-000058 |
| 40 | depreciation amortization | us-gaap:DepreciationDepletionAndAmortization | $290.5M | 2025-12-31 | 2026-02-27 | 10-K | 26-000015 |
| 41 | pretax income | us-gaap:IncomeLossFromContinuingOperationsBeforeInc... | $481.0M | 2025-12-31 | 2026-02-27 | 10-K | 26-000015 |
| 42 | income tax | us-gaap:IncomeTaxExpenseBenefit | $95.7M | 2025-12-31 | 2026-02-27 | 10-K | 26-000015 |
| 43 | current assets | us-gaap:AssetsCurrent | $1.1B | 2024-12-31 | 2026-02-27 | 10-K | 26-000015 |
| 44 | current liabilities | us-gaap:LiabilitiesCurrent | $960.3M | 2024-12-31 | 2026-02-27 | 10-K | 26-000015 |
| 45 | assets | us-gaap:Assets | $4.6B | 2023-12-31 | 2025-02-28 | 10-K | 25-000058 |
| 46 | assets | us-gaap:Assets | $4.4B | 2022-12-31 | 2024-02-16 | 10-K | 24-000050 |
| 47 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 210,340,624 | 2026-02-23 | 2026-02-27 | 10-K | 26-000015 |
| 48 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 208,524,132 | 2025-02-25 | 2025-02-28 | 10-K | 25-000058 |

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