Atmus Filtration Technologies Inc.

ATMU

NYSE; consumer durables; SIC 3714, Motor Vehicle Parts & Accessories; CIK 0001921963

A

strongest fifth of 428 graded peers in the pooled consumer gr...

rank 59 of 428; percentile 14.1; sampling error 2.4 points; lower is stronger

A B C D E

A, the bull



Scoreboard

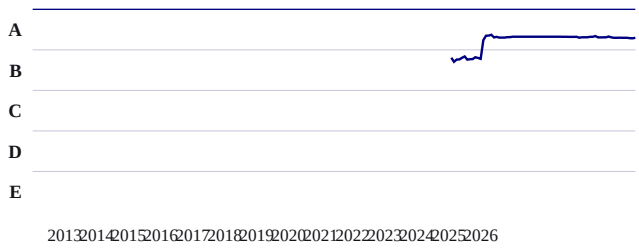
Profitability	C	percentile 49.5
Solvency	B	percentile 25.7
Growth and financing	B	percentile 29.9
Reliability	0.91 AUC	filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025
Peer failure rate	1.01% a year	Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$591M to $2.67B assets	total assets $1.4B
Standard universe	inside	revenue above $1M and assets above $10M
Warnings	none triggered	not computable: distress
Inputs computable	8 of 13	
Graded from	filings received through Feb 13, 2026	279 days before the rescan; latest periodic filing 10-Q received Nov 6, 2026
Last close	$53.70	2026-11-18; market equity $4.4B; 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 13, 2026

Atmus is one of the global leaders of filtration products for on-highway commercial vehicles and off-highway agriculture, construction, mining and power generation vehicles and equipment. Atmus designs and manufactures advanced filtration products, principally under the Fleetguard brand, that enable lower emissions and provide superior asset protection.

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 49.5						
Gross profitability	36.9%	34.9%		46.2	438	2025-12-31
Return on invested capital	34.6%	9.2%		13.2	145	2025-12-31
Accruals ratio	0.4%	(5.1%)		89.0	485	2025-12-31
Gross margin stability, five years	not computable	1.7 pts				

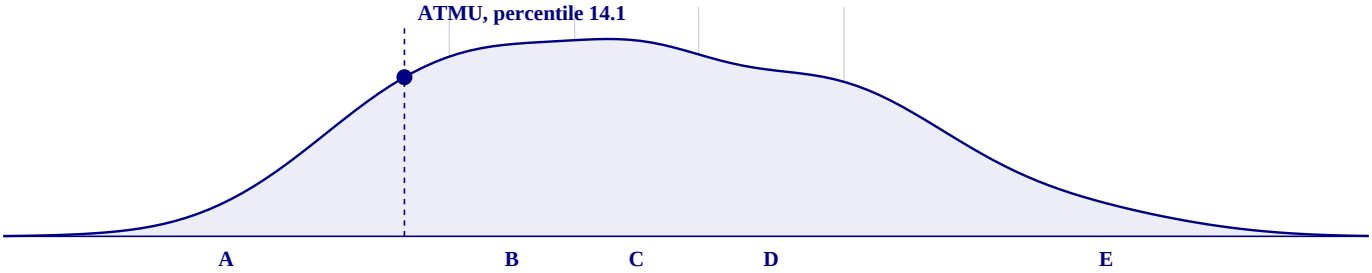
five annual gross margins are required; found 3

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Solvency, sleeve percentile 25.7						
Altman Z double-prime	5.54	2.14	18.0	373	2025-12-31	
Net debt to EBITDA	1.01x	2.09x	34.1	168	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	2.42x	1.58x	25.1	499	2025-12-31	
Growth and financing, sleeve percentile 29.9						
Revenue growth, three-year compound	not computable	1.4%				
four annual observations are required; found 3						
Free cash flow growth, three-year compound	not computable	7.0%				
four consecutive annual FCF observations are required; found 3						
Reinvestment rate	59.2%	18.0%	28.2	249	2025-12-31	
Asset growth, three years	not computable	2.0%				
four annual observations are required; found 3						
Net share issuance, one year	(1.6%)	(0.2%)	31.6	377	2026-01-31	

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
54	Kontoor Brands, Inc. (KTB)	12.8	A	
55	Village Super Market Inc. (VLGEA)	13.0	A	fortress balance sheet
56	Richardson Electronics, Ltd. (RELL)	13.4	A	
57	Yeti Holdings, Inc. (YETI)	13.7	A	
58	Sally Beauty Holdings, Inc. (SBH)	13.9	A	
59	Atmus Filtration Technologies Inc. (ATMU)	14.1	A	
60	Dorman Products, Inc. (DORM)	14.3	A	
61	Signet Jewelers Ltd. (SIG)	14.3	A	
62	Escalade Inc. (ESCA)	14.5	A	fortress balance sheet
63	Core & Main, Inc. (CNM)	14.7	A	
64	Unifirst Corp. (UNF)	15.1	A	fortress balance sheet

What the price implies

at the 2026-11-18 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(4.1%)	(1.3%)	46
Distance from 52-week high	(18.1%)	(22.8%)	60
EBIT to enterprise value	5.9%	4.9%	62
Free cash flow yield	3.4%	4.4%	41
Book value to price	0.12	0.46	20
Sales to price	0.40	1.42	14
Composite equity issuance, five years	not computable	(16.9%)	
Relative strength against the sector, log excess return	0.05	0.03	52

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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 7 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	fail
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	$273.3M
Operating cash flow, four quarters	$261.4M
Months of runway	not finite
Days since last periodic filing	13 (10-Q received Nov 6, 2026)
Median daily dollar volume, 63 sessions	$30.1M

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	$498.3M	2025-12-31	2026-02-13	10-K	26-000015
2	assets	us-gaap:Assets	$1.4B	2025-12-31	2026-02-13	10-K	26-000015
3	operating income	us-gaap:OperatingIncomeLoss	$299.0M	2025-12-31	2026-02-13	10-K	26-000015
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$266.2M	2025-12-31	2026-02-13	10-K	26-000015
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$58.8M	2025-12-31	2026-02-13	10-K	26-000015
6	total debt	us-gaap:LongTermDebt	$570.0M	2025-12-31	2026-02-13	10-K	26-000015
7	book equity	us-gaap:StockholdersEquity	$378.5M	2025-12-31	2026-02-13	10-K	26-000015
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$236.4M	2025-12-31	2026-02-13	10-K	26-000015
9	total debt	us-gaap:LongTermDebt	$592.5M	2024-12-31	2025-02-21	10-K	25-000029
10	book equity	us-gaap:StockholdersEquity	$227.4M	2024-12-31	2026-02-13	10-K	26-000015
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$184.3M	2024-12-31	2026-02-13	10-K	26-000015
12	net income	us-gaap:NetIncomeLoss	$207.4M	2025-12-31	2026-02-13	10-K	26-000015
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$202.7M	2025-12-31	2026-02-13	10-K	26-000015
14	assets	us-gaap:Assets	$1.2B	2024-12-31	2026-02-13	10-K	26-000015
15	current assets	us-gaap:AssetsCurrent	$892.4M	2025-12-31	2026-02-13	10-K	26-000015
16	current liabilities	us-gaap:LiabilitiesCurrent	$368.2M	2025-12-31	2026-02-13	10-K	26-000015
17	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$454.6M	2025-12-31	2026-02-13	10-K	26-000015
18	liabilities	us-gaap:Liabilities	$972.2M	2025-12-31	2026-02-13	10-K	26-000015
19	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$30.0M	2025-12-31	2026-02-13	10-K	26-000015
20	operating income	us-gaap:OperatingIncomeLoss	$248.4M	2023-12-31	2026-02-13	10-K	26-000015
21	interest expense	us-gaap:InterestExpense	$25.8M	2023-12-31	2024-02-14	10-K	24-000007
22	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.8B	2025-12-31	2026-02-13	10-K	26-000015
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.7B	2024-12-31	2026-02-13	10-K	26-000015
24	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.6B	2023-12-31	2026-02-13	10-K	26-000015
25	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$53.9M	2025-12-31	2026-02-13	10-K	26-000015
26	current assets	us-gaap:AssetsCurrent	$755.0M	2024-12-31	2026-02-13	10-K	26-000015
27	current liabilities	us-gaap:LiabilitiesCurrent	$344.9M	2024-12-31	2026-02-13	10-K	26-000015
28	assets	us-gaap:Assets	$1.1B	2023-12-31	2025-02-21	10-K	25-000029
29	shares outstanding	dei:EntityCommonStockSharesOutstanding	81,508,591	2026-01-31	2026-02-13	10-K	26-000015
30	shares outstanding	dei:EntityCommonStockSharesOutstanding	82,866,170	2025-01-31	2025-02-21	10-K	25-000029

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