Dauch Corp. DCH

NYSE; consumer durables; SIC 3714, Motor Vehicle Parts & Accessories; CIK 0001062231

D

fourth fifth of 428 graded peers in the pooled consumer group

rank 299 of 428; percentile 70.0; sampling error 2.4 points; lower is stronger

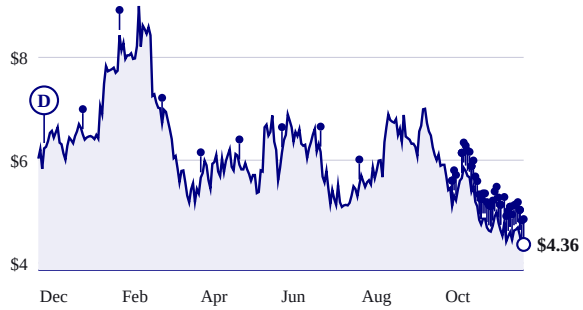
A B C D E

D, the sloth



Scoreboard	
Profitability	C percentile 53.0
Solvency	C percentile 55.5
Growth and financing	D percentile 64.7
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 $6.7B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	dilution not computable: distress
Inputs computable	11 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	$4.36 2026-11-18; market equity $1.0B; 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

Effective January 26, 2026, American Axle & Manufacturing Holdings, Inc. changed its name to Dauch Corporation. As used in this report, except as otherwise indicated in information incorporated by reference, references to "our Company," "we," "our," "us" or "Dauch" mean Dauch Corporation and its subsidiaries and predecessors, collectively. The Company, a Delaware corporation, is a successor to American Axle & Manufacturing of Michigan, Inc., a Michigan corporation, pursuant to a migratory merger between these entities in 1999. In 2017, we acquired Metaldyne Performance Group, Inc. (MPG), with MPG becoming a wholly-owned subsidiary of the Company.

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 53.0						
Gross profitability	10.6%	34.9%		89.2	438	2025-12-31
Return on invested capital	not computable	9.2%				

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pretax income must exceed the validity floor and imply a 0%-100% tax rate						
Accruals ratio	(7.4%)	(5.1%)		36.0	485	2025-12-31
Gross margin stability, five years	1.2 pts	1.7 pts		33.8	377	2025-12-31
Solvency, sleeve percentile 55.5						
Altman Z double-prime	2.45	2.14		43.5	373	2025-12-31
Net debt to EBITDA	5.82x	2.09x		92.8	168	2025-12-31
Interest coverage	0.56x	2.97x		69.5	106	2025-12-31
Current ratio	2.95x	1.58x		16.3	499	2025-12-31
Growth and financing, sleeve percentile 64.7						
Revenue growth, three-year compound	0.2%	1.4%		53.3	446	2025-12-31
Free cash flow growth, three-year compound	(17.6%)	7.0%		82.8	234	2025-12-31
Reinvestment rate	not computable	18.0%				
pretax income must exceed the validity floor and imply a 0%-100% tax rate						
Asset growth, three years	6.8%	2.0%		28.9	448	2025-12-31
Net share issuance, one year	100.7%	(0.2%)		93.9	377	2026-02-10

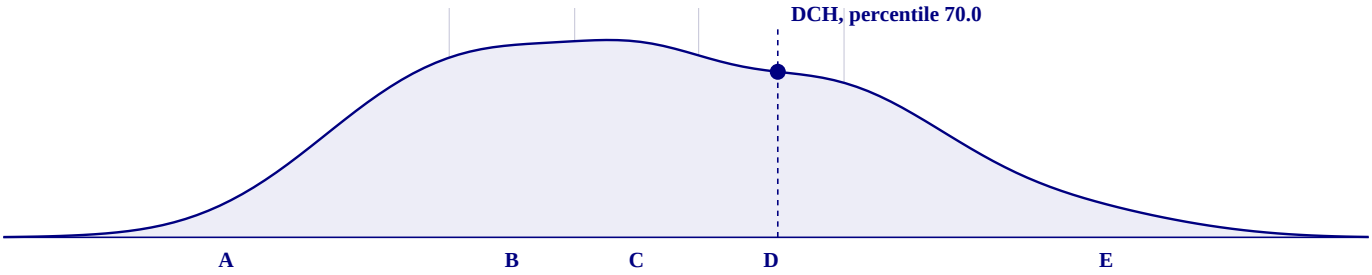
Warnings

1 of 7 checks triggered; none of them enters the letter

Check	Measured
Dilution	split-adjusted year-over-year share growth is 100.7%

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
294	AerSale Corp. (ASLE)	68.9	D	short runway, fortress balance sheet
295	Kraft Heinz Co. (KHC)	69.2	D	
296	Adient plc (ADNT)	69.3	D	
297	Educational Development Corp. (EDUC)	69.3	D	fortress balance sheet
298	Bloomin' Brands, Inc. (BLMN)	69.7	D	
299	Dauch Corp. (DCH)	70.0	D	dilution
300	Deluxe Corp. (DLX)	70.1	D	
301	OneWater Marine Inc. (ONEW)	70.2	D	
302	FOX Factory Holding Corp. (FOXF)	70.3	D	
303	Wendy's Co. (WEN)	70.6	D	
304	Scholastic Corp. (SCHL)	70.9	D	

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	(15.8%)	(1.3%)	35
Distance from 52-week high	(51.6%)	(22.8%)	16
EBIT to enterprise value	2.2%	4.9%	29

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Free cash flow yield	15.0%	4.4%	89
Book value to price	1.45	0.46	89
Sales to price	5.63	1.42	88
Composite equity issuance, five years	74.1%	(16.9%)	95
Relative strength against the sector, log excess return	(0.08)	0.03	40
Twelve-month failure probability, CHS model	not computable	0.04%	

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 4 of 9, period end 2025-12-31	
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	fail
Current ratio improved	pass
No new shares issued	fail
Gross margin improved	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$800.2M
Operating cash flow, four quarters	$313.7M
Months of runway	not finite
Days since last periodic filing	13 (10-Q received Nov 6, 2026)
Median daily dollar volume, 63 sessions	$20.8M

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	$704.5M	2025-12-31	2026-02-13	10-K	26-000020
2	assets	us-gaap:Assets	$6.7B	2025-12-31	2026-02-13	10-K	26-000020
3	operating income	us-gaap:OperatingIncomeLoss	$112.3M	2025-12-31	2026-02-13	10-K	26-000020
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$1.5M	2025-12-31	2026-02-13	10-K	26-000020
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$21.2M	2025-12-31	2026-02-13	10-K	26-000020
6	total debt	us-gaap:LongTermDebt	$4.0B	2025-12-31	2026-02-13	10-K	26-000020
7	book equity	us-gaap:StockholdersEquity	$640.0M	2025-12-31	2026-02-13	10-K	26-000020
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$708.9M	2025-12-31	2026-02-13	10-K	26-000020
9	total debt	us-gaap:LongTermDebt	$2.6B	2024-12-31	2026-02-13	10-K	26-000020
10	book equity	us-gaap:StockholdersEquity	$562.8M	2024-12-31	2026-02-13	10-K	26-000020
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$552.9M	2024-12-31	2026-02-13	10-K	26-000020
12	net income	us-gaap:NetIncomeLoss	-$19.7M	2025-12-31	2026-02-13	10-K	26-000020
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$411.6M	2025-12-31	2026-02-13	10-K	26-000020
14	assets	us-gaap:Assets	$5.1B	2024-12-31	2026-02-13	10-K	26-000020
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$5.8B	2025-12-31	2026-02-13	10-K	26-000020
16	gross profit	us-gaap:GrossProfit	$741.4M	2024-12-31	2026-02-13	10-K	26-000020
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$6.1B	2024-12-31	2026-02-13	10-K	26-000020
18	gross profit	us-gaap:GrossProfit	$624.3M	2023-12-31	2026-02-13	10-K	26-000020
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$6.1B	2023-12-31	2026-02-13	10-K	26-000020
20	gross profit	us-gaap:GrossProfit	$704.9M	2022-12-31	2025-02-14	10-K	25-000008
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$5.8B	2022-12-31	2025-02-14	10-K	25-000008
22	gross profit	us-gaap:GrossProfit	$722.7M	2021-12-31	2024-02-16	10-K	24-000007
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$5.2B	2021-12-31	2024-02-16	10-K	24-000007
24	current assets	us-gaap:AssetsCurrent	$3.6B	2025-12-31	2026-02-13	10-K	26-000020

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25	current liabilities	us-gaap:LiabilitiesCurrent	$1.2B	2025-12-31	2026-02-13	10-K	26-000020
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$267.9M	2025-12-31	2026-02-13	10-K	26-000020
27	liabilities	us-gaap:Liabilities	$6.0B	2025-12-31	2026-02-13	10-K	26-000020
28	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$459.5M	2025-12-31	2026-02-13	10-K	26-000020
29	interest expense	us-gaap:InterestExpense	$201.1M	2025-12-31	2026-02-13	10-K	26-000020
30	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$256.5M	2025-12-31	2026-02-13	10-K	26-000020
31	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$455.4M	2024-12-31	2026-02-13	10-K	26-000020
32	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$248.0M	2024-12-31	2026-02-13	10-K	26-000020
33	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$396.1M	2023-12-31	2026-02-13	10-K	26-000020
34	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$194.6M	2023-12-31	2026-02-13	10-K	26-000020
35	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$448.9M	2022-12-31	2025-02-14	10-K	25-000008
36	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$171.4M	2022-12-31	2025-02-14	10-K	25-000008
37	current assets	us-gaap:AssetsCurrent	$1.9B	2024-12-31	2026-02-13	10-K	26-000020
38	current liabilities	us-gaap:LiabilitiesCurrent	$1.2B	2024-12-31	2026-02-13	10-K	26-000020
39	assets	us-gaap:Assets	$5.4B	2023-12-31	2026-02-13	10-K	26-000020
40	assets	us-gaap:Assets	$5.5B	2022-12-31	2025-02-14	10-K	25-000008
41	shares outstanding	dei:EntityCommonStockSharesOutstanding	235,984,927	2026-02-10	2026-02-13	10-K	26-000020
42	shares outstanding	dei:EntityCommonStockSharesOutstanding	117,581,028	2025-02-11	2025-02-14	10-K	25-000008

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