Griffon Corp. GFF

NYSE; manufacturing; SIC 3442, Metal Doors, Sash, Frames, Moldings & Trim; CIK 0000050725

D

fourth fifth of 245 graded peers in manufacturing

rank 183 of 245; percentile 74.6; sampling error 3.0 points; lower is stronger

A B C D E

D, the sloth



Scoreboard

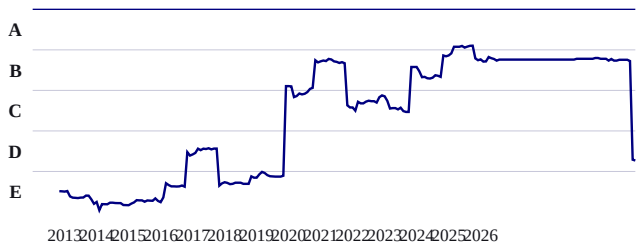
Profitability	C/D	percentile 60.0
Solvency	B	percentile 35.1
Growth and financing	D	percentile 76.2
Reliability	0.91 AUC	filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025
Peer failure rate	1.01% a year	Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$591M to $2.67B assets	total assets $1.7B
Standard universe	inside	revenue above $1M and assets above $10M
Warnings	none triggered	not computable: distress
Inputs computable	10 of 13	
Graded from	filings received through Nov 17, 2026	2 days before the rescan; latest periodic filing 10-K received Nov 17, 2026
Last close	$107.24	2026-11-18; market equity $4.8B; 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 Nov 19, 2025

Griffon Corporation (the "Company," "Griffon," "we," or "us") is a diversified management and holding company that conducts business through wholly-owned subsidiaries. The Company, founded in 1959, is a Delaware corporation headquartered in New York, N.Y. and is listed on the New York Stock Exchange (NYSE:GFF). Our strategic objective is to maintain leading positions in the markets we serve by providing innovative, branded products with superior quality and industry-leading service.

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 60.0						
Gross profitability	49.9%	22.2%		6.0	267	2026-09-30
Return on invested capital	not computable	9.9%				
latest aligned inputs end 2024-09-30; latest annual assets end 2026-09-30						
Accruals ratio	0.9%	(3.7%)		85.6	286	2026-09-30

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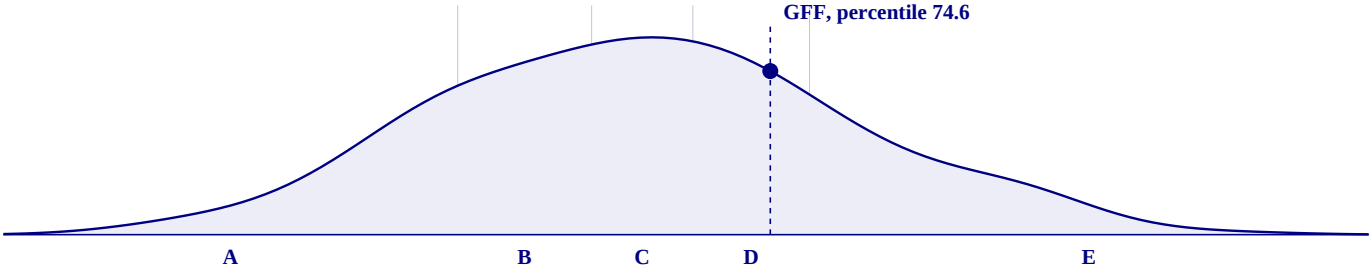
Gross margin stability, five years	6.3 pts	2.1 pts	88.2	222	2026-09-30
Solvency, sleeve percentile 35.1					
Altman Z double-prime	4.58	3.73	33.3	223	2026-09-30
Net debt to EBITDA	not computable	1.75x			
EBITDA must exceed $100,000					
Interest coverage	not computable	5.13x			
latest aligned inputs end 2023-09-30; latest annual assets end 2026-09-30					
Current ratio	2.66x	2.26x	36.9	302	2026-09-30
Growth and financing, sleeve percentile 76.2					
Revenue growth, three-year compound	(11.7%)	2.2%	93.8	261	2026-09-30
Free cash flow growth, three-year compound	(10.2%)	13.7%	84.2	140	2026-09-30
Reinvestment rate	(155.7%)	25.7%	96.4	138	2026-09-30
Asset growth, three years	(10.8%)	4.2%	90.9	265	2026-09-30
Net share issuance, one year	(2.7%)	0.0%	15.8	241	2026-10-31

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
178	JBT Marel Corp. (JBTM)	72.5	D	
179	Trimas Corp. (TRS)	73.0	D	late filer
180	Columbus Mckinnon Corp. (CMCO)	73.4	D	
181	Esab Corp. (ESAB)	73.8	D	
182	Loar Holdings Inc. (LOAR)	74.2	D	
183	Griffon Corp. (GFF)	74.6	D	
184	StandardAero, Inc. (SARO)	75.0	D	
185	Carrier Global Corp. (CARR)	75.4	D	
186	Johnson Controls International plc (JCI)	75.8	D	
187	Entegris Inc. (ENTG)	76.2	D	
188	Illinois Tool Works Inc. (ITW)	76.6	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	27.0%	9.9%	66
Distance from 52-week high	(0.2%)	(27.8%)	99
EBIT to enterprise value	6.8%	4.2%	78
Free cash flow yield	5.5%	3.6%	71
Book value to price	0.06	0.37	7
Sales to price	0.38	0.57	32
Composite equity issuance, five years	(42.3%)	(9.4%)	3
Relative strength against the sector, log excess return	0.15	0.01	66
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 2026-09-30	
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	fail
No new shares issued	pass
Gross margin improved	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$98.6M
Operating cash flow, four quarters	$304.9M
Months of runway	not finite
Days since last periodic filing	2 (10-K received Nov 17, 2026)
Median daily dollar volume, 63 sessions	$31.3M

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	$857.0M	2026-09-30	2026-11-17	10-K	26-074580
2	assets	us-gaap:Assets	$1.7B	2026-09-30	2026-11-17	10-K	26-074580
3	operating income	us-gaap:OperatingIncomeLoss	$436.2M	2024-09-30	2026-11-17	10-K	26-074580
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$332.1M	2024-09-30	2026-11-17	10-K	26-074580
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$86.5M	2024-09-30	2026-11-17	10-K	26-074580
6	total debt	us-gaap:LongTermDebt	$1.5B	2024-09-30	2024-11-13	10-K	24-000152
7	book equity	us-gaap:StockholdersEquity	$224.9M	2024-09-30	2026-11-17	10-K	26-074580
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$114.4M	2024-09-30	2025-11-19	10-K	25-053242
9	total debt	us-gaap:LongTermDebt	$1.5B	2023-09-30	2024-11-13	10-K	24-000152
10	book equity	us-gaap:StockholdersEquity	$315.2M	2023-09-30	2026-11-17	10-K	26-074580
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$102.9M	2023-09-30	2024-11-13	10-K	24-000152
12	net income	us-gaap:NetIncomeLoss	$321.2M	2026-09-30	2026-11-17	10-K	26-074580
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesC...	$304.9M	2026-09-30	2026-11-17	10-K	26-074580
14	assets	us-gaap:Assets	$2.1B	2025-09-30	2026-11-17	10-K	26-074580
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.8B	2026-09-30	2026-11-17	10-K	26-074580
16	gross profit	us-gaap:GrossProfit	$848.1M	2025-09-30	2026-11-17	10-K	26-074580
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.8B	2025-09-30	2026-11-17	10-K	26-074580
18	gross profit	us-gaap:GrossProfit	$872.4M	2024-09-30	2026-11-17	10-K	26-074580
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.9B	2024-09-30	2026-11-17	10-K	26-074580
20	gross profit	us-gaap:GrossProfit	$948.8M	2023-09-30	2025-11-19	10-K	25-053242
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$2.7B	2023-09-30	2025-11-19	10-K	25-053242
22	gross profit	us-gaap:GrossProfit	$936.9M	2022-09-30	2024-11-13	10-K	24-000152
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$2.8B	2022-09-30	2024-11-13	10-K	24-000152
24	current assets	us-gaap:AssetsCurrent	$533.6M	2026-09-30	2026-11-17	10-K	26-074580
25	current liabilities	us-gaap:LiabilitiesCurrent	$200.9M	2026-09-30	2026-11-17	10-K	26-074580
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$760.5M	2026-09-30	2026-11-17	10-K	26-074580
27	operating income	us-gaap:OperatingIncomeLoss	$419.8M	2026-09-30	2026-11-17	10-K	26-074580
28	book equity	us-gaap:StockholdersEquity	$306.8M	2026-09-30	2026-11-17	10-K	26-074580
29	liabilities	us-gaap:Liabilities	$1.4B	2026-09-30	2026-11-17	10-K	26-074580
30	total debt	us-gaap:LongTermDebt	$1.6B	2022-09-30	2023-11-16	10-K	23-000055
31	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$120.2M	2022-09-30	2023-11-16	10-K	23-000055

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32	operating income	us-gaap:OperatingIncomeLoss	-$189.1M	2022-09-30	2024-11-13	10-K	24-000152
33	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$64.7M	2022-09-30	2022-11-18	10-K	22-000090
34	operating income	us-gaap:OperatingIncomeLoss	$196.9M	2023-09-30	2025-11-19	10-K	25-053242
35	interest expense	us-gaap:InterestExpense	$101.4M	2023-09-30	2023-11-16	10-K	23-000055
36	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$37.9M	2026-09-30	2026-11-17	10-K	26-074580
37	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesC...	$307.8M	2025-09-30	2026-11-17	10-K	26-074580
38	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$41.7M	2025-09-30	2026-11-17	10-K	26-074580
39	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesC...	$307.4M	2024-09-30	2026-11-17	10-K	26-074580
40	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$50.3M	2024-09-30	2026-11-17	10-K	26-074580
41	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesC...	$431.8M	2023-09-30	2025-11-19	10-K	25-053242
42	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$63.6M	2023-09-30	2025-11-19	10-K	25-053242
43	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$40.3M	2026-09-30	2026-11-17	10-K	26-074580
44	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$328.2M	2026-09-30	2026-11-17	10-K	26-074580
45	income tax	us-gaap:IncomeTaxExpenseBenefit	$92.6M	2026-09-30	2026-11-17	10-K	26-074580
46	current assets	us-gaap:AssetsCurrent	$1.2B	2025-09-30	2026-11-17	10-K	26-074580
47	current liabilities	us-gaap:LiabilitiesCurrent	$446.2M	2025-09-30	2026-11-17	10-K	26-074580
48	assets	us-gaap:Assets	$2.4B	2024-09-30	2025-11-19	10-K	25-053242
49	assets	us-gaap:Assets	$2.4B	2023-09-30	2024-11-13	10-K	24-000152
50	shares outstanding	dei:EntityCommonStockSharesOutstanding	44,977,512	2026-10-31	2026-11-17	10-K	26-074580
51	shares outstanding	dei:EntityCommonStockSharesOutstanding	46,231,089	2025-10-31	2025-11-19	10-K	25-053242

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