Hubbell Inc.

HUBB

NYSE; business equipment; SIC 3670, Electronic Components & Accessories; CIK 0000048898

C

middle fifth of 468 graded peers in business equipment

rank 258 of 468; percentile 55.0; sampling error 2.3 points; lower is stronger

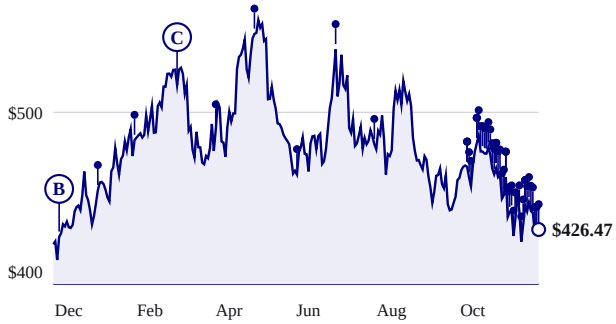
A B C D E

C, the tortoise



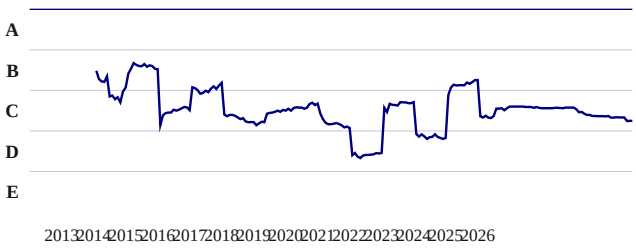
Scoreboard	
Profitability	D percentile 67.4
Solvency	C percentile 42.5
Growth and financing	B/C percentile 41.2
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $8.2B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered
Inputs computable	10 of 13
Graded from	filings received through Feb 12, 2026 280 days before the rescan; latest periodic filing 10-Q received Oct 28, 2026
Last close	$425.77 2026-11-18; market equity $22.5B; 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 12, 2026

Hubbell Incorporated (herein referred to as "Hubbell", the "Company", the "registrant", "we", "our" or "us", which references shall include its divisions and subsidiaries as the context may require) was founded as a proprietorship in 1888, and was incorporated in Connecticut in 1905. Recognized for our innovation, quality, and deep commitment to serving our customers for over 135 years, Hubbell is a world-class manufacturer of electrical and utility solutions, with more than 75 brands used around the world.

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 67.4						
Gross profitability	25.1%	29.2%		57.1	512	2025-12-31
Return on invested capital	not computable	11.0%				
latest aligned inputs end 2024-12-31; latest annual assets end 2025-12-31						
Accruals ratio	(1.9%)	(7.4%)		81.6	566	2025-12-31

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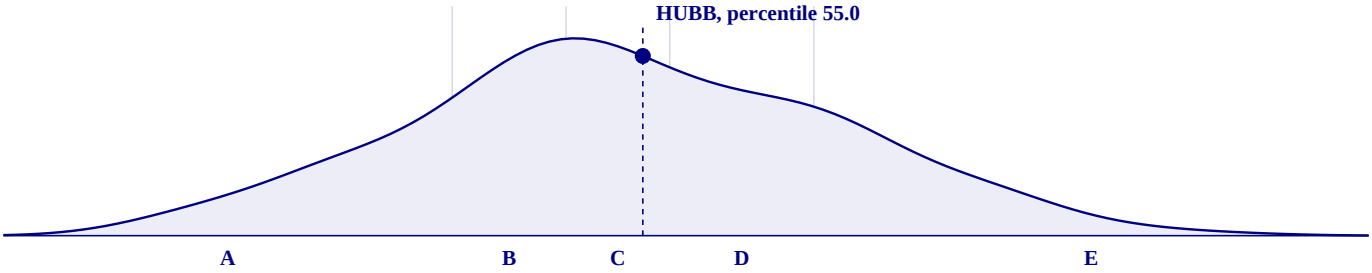
Gross margin stability, five years	3.1 pts	2.3 pts	63.4	405	2025-12-31
Solvency, sleeve percentile 42.5					
Altman Z double-prime	4.42	2.21	28.2	516	2025-12-31
Net debt to EBITDA	not computable	1.08x			
latest aligned inputs end 2024-12-31; latest annual assets end 2025-12-31					
Interest coverage	not computable	4.90x			
latest aligned inputs end 2020-12-31; latest annual assets end 2025-12-31					
Current ratio	1.72x	1.98x	56.8	600	2025-12-31
Growth and financing, sleeve percentile 41.2					
Revenue growth, three-year compound	5.7%	6.5%	53.1	502	2025-12-31
Free cash flow growth, three-year compound	19.9%	17.5%	46.0	253	2025-12-31
Reinvestment rate	5.3%	15.6%	53.8	213	2025-12-31
Asset growth, three years	15.1%	5.0%	24.1	519	2025-12-31
Net share issuance, one year	(0.9%)	0.5%	29.0	405	2026-02-05

Among 468 peers

business equipment; 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
253	CareCloud, Inc. (CCLD)	54.0	C	fortress balance sheet
254	Factset Research Systems Inc. (FDS)	54.2	C	
255	Broadcom Inc. (AVGO)	54.4	C	
256	Owlet, Inc. (OWLT)	54.6	C	dilution, fortress balance sheet
257	Salesforce, Inc. (CRM)	54.8	C	
258	Hubbell Inc. (HUBB)	55.0	C	
259	Benchmark Electronics Inc. (BHE)	55.2	C	fortress balance sheet
260	Knightscope, Inc. (KSCP)	55.5	C	short runway, fortress balance sheet
261	TTM Technologies Inc. (TTMI)	55.7	C	
262	Espey MFG & Electronics Corp. (ESP)	55.9	C	
263	Seer, Inc. (SEER)	56.1	C	

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	(2.3%)	(2.2%)	50
Distance from 52-week high	(23.6%)	(37.2%)	66
EBIT to enterprise value	4.5%	1.8%	75
Free cash flow yield	3.9%	2.9%	58
Book value to price	0.18	0.28	36
Sales to price	0.26	0.33	44
Composite equity issuance, five years	(11.9%)	4.3%	23
Relative strength against the sector, log excess return	(0.29)	(0.29)	50
Twelve-month failure probability, CHS model	0.04%	0.05%	36

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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	pass
Long-term leverage fell	fail
Current ratio improved	fail
No new shares issued	pass
Gross margin improved	pass
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$334.5M
Operating cash flow, four quarters	$1.1B
Months of runway	not finite
Days since last periodic filing	22 (10-Q received Oct 28, 2026)
Median daily dollar volume, 63 sessions	$224.5M

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	$2.1B	2025-12-31	2026-02-12	10-K	26-007500
2	assets	us-gaap:Assets	$8.2B	2025-12-31	2026-02-12	10-K	26-007500
3	operating income	us-gaap:OperatingIncomeLoss	$1.1B	2024-12-31	2026-02-12	10-K	26-007500
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$1.0B	2024-12-31	2026-02-12	10-K	26-007500
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$222.1M	2024-12-31	2026-02-12	10-K	26-007500
6	total debt	us-gaap:LongTermDebt	$1.4B	2024-12-31	2025-02-13	10-K	25-005311
7	book equity	us-gaap:StockholdersEquity	$3.4B	2024-12-31	2026-02-12	10-K	26-007500
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$329.1M	2024-12-31	2026-02-12	10-K	26-007500
9	total debt	us-gaap:LongTermDebt	$2.0B	2023-12-31	2025-02-13	10-K	25-005311
10	book equity	us-gaap:StockholdersEquity	$2.9B	2023-12-31	2025-02-13	10-K	25-005311
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$336.1M	2023-12-31	2025-02-13	10-K	25-005311
12	net income	us-gaap:NetIncomeLoss	$887.1M	2025-12-31	2026-02-12	10-K	26-007500
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$1.0B	2025-12-31	2026-02-12	10-K	26-007500
14	assets	us-gaap:Assets	$6.8B	2024-12-31	2026-02-12	10-K	26-007500
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$5.8B	2025-12-31	2026-02-12	10-K	26-007500
16	gross profit	us-gaap:GrossProfit	$1.9B	2024-12-31	2026-02-12	10-K	26-007500
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$5.6B	2024-12-31	2026-02-12	10-K	26-007500
18	gross profit	us-gaap:GrossProfit	$1.9B	2023-12-31	2026-02-12	10-K	26-007500
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$5.4B	2023-12-31	2026-02-12	10-K	26-007500
20	gross profit	us-gaap:GrossProfit	$1.5B	2022-12-31	2025-02-13	10-K	25-005311
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.9B	2022-12-31	2025-02-13	10-K	25-005311
22	gross profit	us-gaap:GrossProfit	$1.2B	2021-12-31	2024-02-08	10-K	24-003792
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.2B	2021-12-31	2024-02-08	10-K	24-003792
24	current assets	us-gaap:AssetsCurrent	$2.6B	2025-12-31	2026-02-12	10-K	26-007500
25	current liabilities	us-gaap:LiabilitiesCurrent	$1.5B	2025-12-31	2026-02-12	10-K	26-007500
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$4.2B	2025-12-31	2026-02-12	10-K	26-007500
27	operating income	us-gaap:OperatingIncomeLoss	$1.2B	2025-12-31	2026-02-12	10-K	26-007500
28	book equity	us-gaap:StockholdersEquity	$3.8B	2025-12-31	2026-02-12	10-K	26-007500
29	liabilities	us-gaap:Liabilities	$4.4B	2025-12-31	2026-02-12	10-K	26-007500
30	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$212.1M	2024-12-31	2026-02-12	10-K	26-007500
31	operating income	us-gaap:OperatingIncomeLoss	$494.5M	2020-12-31	2023-02-09	10-K	23-002875

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32	interest expense	us-gaap:InterestExpense	$60.3M	2020-12-31	2021-02-11	10-K	21-001868
33	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$155.1M	2025-12-31	2026-02-12	10-K	26-007500
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesC...	$991.2M	2024-12-31	2025-02-13	10-K	25-005311
35	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$180.4M	2024-12-31	2026-02-12	10-K	26-007500
36	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesC...	$880.8M	2023-12-31	2025-02-13	10-K	25-005311
37	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$165.7M	2023-12-31	2026-02-12	10-K	26-007500
38	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesC...	$636.2M	2022-12-31	2025-02-13	10-K	25-005311
39	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$129.3M	2022-12-31	2025-02-13	10-K	25-005311
40	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$206.1M	2025-12-31	2026-02-12	10-K	26-007500
41	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$1.1B	2025-12-31	2026-02-12	10-K	26-007500
42	income tax	us-gaap:IncomeTaxExpenseBenefit	$227.2M	2025-12-31	2026-02-12	10-K	26-007500
43	current assets	us-gaap:AssetsCurrent	$2.3B	2024-12-31	2026-02-12	10-K	26-007500
44	current liabilities	us-gaap:LiabilitiesCurrent	$1.3B	2024-12-31	2026-02-12	10-K	26-007500
45	assets	us-gaap:Assets	$7.1B	2023-12-31	2026-02-12	10-K	26-007500
46	assets	us-gaap:Assets	$5.4B	2022-12-31	2025-02-13	10-K	25-005311
47	shares outstanding	dei:EntityCommonStockSharesOutstanding	53,161,602	2026-02-05	2026-02-12	10-K	26-007500
48	shares outstanding	dei:EntityCommonStockSharesOutstanding	53,667,674	2025-02-06	2025-02-13	10-K	25-005311

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