Oshkosh Corp.

OSK

NYSE; consumer durables; SIC 3711, Motor Vehicles & Passenger Car Bodies; CIK 0000775158

B

second fifth of 428 graded peers in the pooled consumer group

rank 151 of 428; percentile 35.4; sampling error 2.4 points; lower is stronger

A B C D E

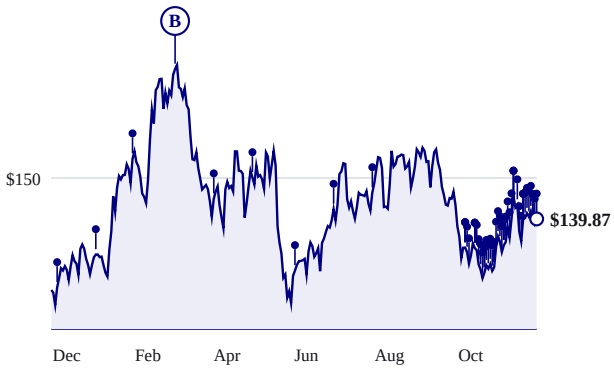
B, the elk



Scoreboard

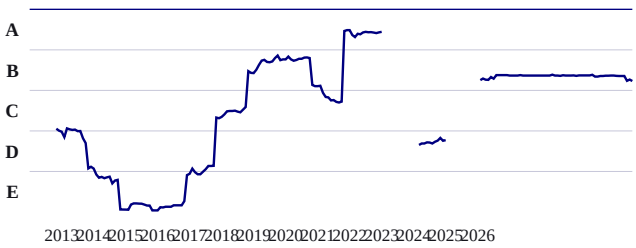
Profitability	D/E	percentile 78.4
Solvency	B	percentile 32.5
Growth and financing	A/B	percentile 20.5
Reliability	0.94 AUC	filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year	Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets	total assets $10.1B
Standard universe	inside	revenue above $1M and assets above $10M
Warnings	none triggered	not computable: distress
Inputs computable	9 of 13	
Graded from	filings received through Feb 17, 2026	275 days before the rescan; latest periodic filing 10-Q received Oct 29, 2026
Last close	$139.84	2026-11-18; market equity $8.5B; 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 17, 2026

Oshkosh Corporation is a global industrial technology company that designs and deploys advanced technologies to empower everyday heroes who build, serve and protect communities around the world. Across construction, firefighting, aviation, refuse collection, defense and delivery industries, we create purpose-built vehicles, equipment and integrated ecosystems that are safe, intuitive and highly productive. As an innovator and integrator, we work directly with our customers to solve real-world challenges - developing and applying breakthrough technologies in autonomy, artificial intelligence, connectivity and electrification.

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 78.4						
Gross profitability	18.1%	34.9%		75.7	438	2025-12-31
Return on invested capital	not computable	9.2%				

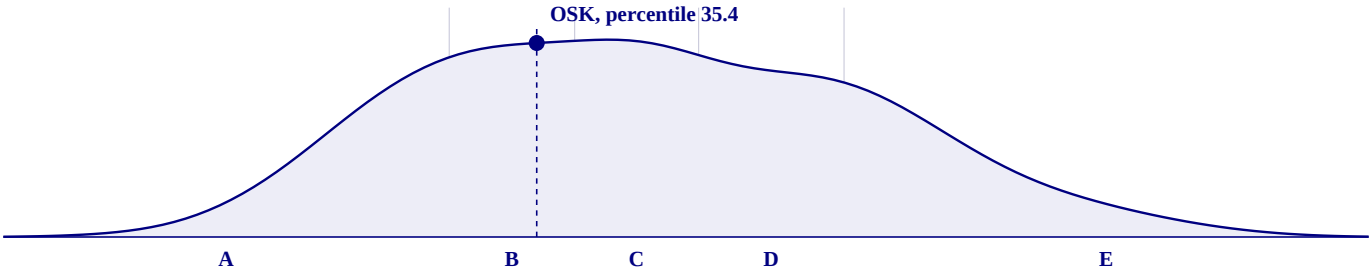
latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31

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Accruals ratio	(1.4%)	(5.1%)	81.0	485	2025-12-31
Gross margin stability, five years	not computable	1.7 pts			
five consecutive annual gross margins are required					
Solvency, sleeve percentile 32.5					
Altman Z double-prime	not computable	2.14			
one or more required annual facts are missing					
Net debt to EBITDA	not computable	2.09x			
latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31					
Interest coverage	7.99x	2.97x	29.5	106	2025-12-31
Current ratio	1.94x	1.58x	35.5	499	2025-12-31
Growth and financing, sleeve percentile 20.5					
Revenue growth, three-year compound	8.0%	1.4%	20.2	446	2025-12-31
Free cash flow growth, three-year compound	23.0%	7.0%	27.5	234	2025-12-31
Reinvestment rate	124.7%	18.0%	12.1	249	2025-12-31
Asset growth, three years	9.2%	2.0%	20.6	448	2025-12-31
Net share issuance, one year	(3.1%)	(0.2%)	22.1	377	2026-02-10

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
146	Cal-Maine Foods Inc. (CALM)	34.2	B	fortress balance sheet
147	Weyco Group Inc. (WEYS)	34.5	B	
148	Reborn Coffee, Inc. (REBN)	34.9	B	dilution, late filer, fortress balance sheet
149	Carters Inc. (CRI)	35.0	B	
150	Haverty Furniture Companies Inc. (HVT)	35.3	B	fortress balance sheet
151	Oshkosh Corp. (OSK)	35.4	B	
152	Cencora, Inc. (COR)	35.7	B	
153	Coffee Holding Co. Inc. (JVA)	35.9	B	late filer
154	Live Ventures Inc. (LIVE)	36.1	B	
155	Alta Equipment Group Inc. (ALTG)	36.6	B	
156	Mohawk Industries Inc. (MHK)	36.8	B/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	6.1%	(1.3%)	58
Distance from 52-week high	(21.4%)	(22.8%)	52
EBIT to enterprise value	11.0%	4.9%	89
Free cash flow yield	7.2%	4.4%	67
Book value to price	0.53	0.46	55
Sales to price	1.22	1.42	43

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Composite equity issuance, five years	(21.3%)	(16.9%)	37
Relative strength against the sector, log excess return	0.15	0.03	64
Twelve-month failure probability, CHS model	not computable	0.04%	

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 5 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	fail
Current ratio improved	pass
No new shares issued	pass
Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$558.0M
Operating cash flow, four quarters	$1.1B
Months of runway	not finite
Days since last periodic filing	21 (10-Q received Oct 29, 2026)
Median daily dollar volume, 63 sessions	$78.0M

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	$1.8B	2025-12-31	2026-02-17	10-K	26-054061
2	assets	us-gaap:Assets	$10.1B	2025-12-31	2026-02-17	10-K	26-054061
3	operating income	us-gaap:OperatingIncomeLoss	$837.6M	2023-12-31	2026-02-17	10-K	26-054061
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$797.6M	2023-12-31	2026-02-17	10-K	26-054061
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$190.0M	2023-12-31	2026-02-17	10-K	26-054061
6	total debt	us-gaap:LongTermDebt	$597.5M	2023-12-31	2024-02-29	10-K	24-022841
7	book equity	us-gaap:StockholdersEquity	$3.7B	2023-12-31	2025-02-20	10-K	25-024305
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$125.4M	2023-12-31	2025-02-20	10-K	25-024305
9	total debt	us-gaap:LongTermDebt	$595.0M	2022-12-31	2024-02-29	10-K	24-022841
10	book equity	us-gaap:StockholdersEquity	$3.2B	2022-12-31	2024-02-29	10-K	24-022841
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$805.9M	2022-12-31	2024-02-29	10-K	24-022841
12	net income	us-gaap:ProfitLoss	$647.0M	2025-12-31	2026-02-17	10-K	26-054061
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$783.4M	2025-12-31	2026-02-17	10-K	26-054061
14	assets	us-gaap:Assets	$9.4B	2024-12-31	2026-02-17	10-K	26-054061
15	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$159.9M	2023-12-31	2026-02-17	10-K	26-054061
16	operating income	us-gaap:OperatingIncomeLoss	$939.5M	2025-12-31	2026-02-17	10-K	26-054061
17	interest expense	us-gaap:InterestAndDebtExpense	$117.6M	2025-12-31	2026-02-17	10-K	26-054061
18	current assets	us-gaap:AssetsCurrent	$5.2B	2025-12-31	2026-02-17	10-K	26-054061
19	current liabilities	us-gaap:LiabilitiesCurrent	$2.7B	2025-12-31	2026-02-17	10-K	26-054061
20	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$10.4B	2025-12-31	2026-02-17	10-K	26-054061
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$10.7B	2024-12-31	2026-02-17	10-K	26-054061
22	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$9.7B	2023-12-31	2026-02-17	10-K	26-054061
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$8.3B	2022-12-31	2025-02-20	10-K	25-024305
24	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$165.4M	2025-12-31	2026-02-17	10-K	26-054061
25	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$550.1M	2024-12-31	2026-02-17	10-K	26-054061
26	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$281.0M	2024-12-31	2026-02-17	10-K	26-054061
27	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$599.6M	2023-12-31	2026-02-17	10-K	26-054061

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28	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$325.3M	2023-12-31	2026-02-17	10-K	26-054061
29	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$601.3M	2022-12-31	2025-02-20	10-K	25-024305
30	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$269.5M	2022-12-31	2025-02-20	10-K	25-024305
31	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$224.1M	2025-12-31	2026-02-17	10-K	26-054061
32	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$842.0M	2025-12-31	2026-02-17	10-K	26-054061
33	income tax	us-gaap:IncomeTaxExpenseBenefit	$191.5M	2025-12-31	2026-02-17	10-K	26-054061
34	current assets	us-gaap:AssetsCurrent	$4.5B	2024-12-31	2026-02-17	10-K	26-054061
35	current liabilities	us-gaap:LiabilitiesCurrent	$3.0B	2024-12-31	2026-02-17	10-K	26-054061
36	assets	us-gaap:Assets	$9.1B	2023-12-31	2025-02-20	10-K	25-024305
37	assets	us-gaap:Assets	$7.7B	2022-12-31	2024-02-29	10-K	24-022841
38	shares outstanding	dei:EntityCommonStockSharesOutstanding	62,548,631	2026-02-10	2026-02-17	10-K	26-054061
39	shares outstanding	dei:EntityCommonStockSharesOutstanding	64,524,506	2025-02-13	2025-02-20	10-K	25-024305

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