Somnigroup International Inc.

SGI

NYSE; consumer durables; SIC 2510, Household Furniture; CIK 0001206264

C

middle fifth of 428 graded peers in the pooled consumer group

rank 246 of 428; percentile 57.6; sampling error 2.4 points; lower is stronger

A B C D E

C, the tortoise



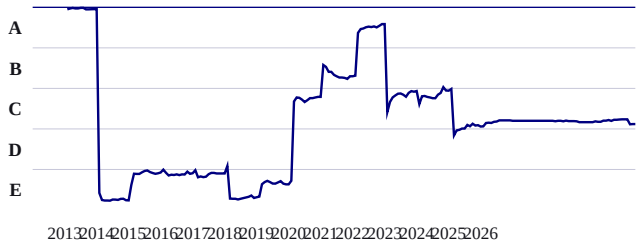
Scoreboard	
Profitability	C percentile 50.6
Solvency	D percentile 68.6
Growth and financing	B percentile 35.0
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $11.6B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: short runway, distress
Inputs computable	10 of 13
Graded from	filings received through Feb 27, 2026 265 days before the rescan; latest periodic filing 10-Q received Nov 9, 2026
Last close	$62.41 2026-11-18; market equity $14.4B; 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 27, 2026

Somnigroup is the world's largest bedding company, dedicated to enriching people's lives through the power of a good night's sleep and transforming how the world sleeps. With superior capabilities in design, manufacturing, distribution and retail, we deliver breakthrough sleep solutions and serve the evolving needs of consumers in over 100 countries worldwide through our fully-owned businesses, Tempur Sealy, Mattress Firm and Dreams.

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 50.6						
Gross profitability	27.4%	34.9%		60.4	438	2025-12-31
Return on invested capital	not computable	9.2%				
latest aligned inputs end 2022-12-31; latest annual assets end 2025-12-31						
Accruals ratio	(4.7%)	(5.1%)		56.6	485	2025-12-31

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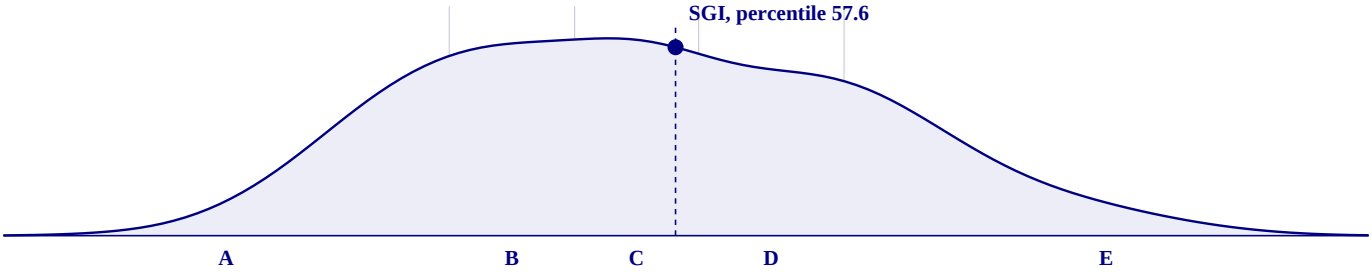
Gross margin stability, five years	1.2 pts	1.7 pts	34.8	377	2025-12-31
Solvency, sleeve percentile 68.6					
Altman Z double-prime	1.74	2.14	53.0	373	2025-12-31
Net debt to EBITDA	not computable	2.09x			
latest aligned inputs end 2022-12-31; latest annual assets end 2025-12-31					
Interest coverage	not computable	2.97x			
latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31					
Current ratio	0.83x	1.58x	84.3	499	2025-12-31
Growth and financing, sleeve percentile 35.0					
Revenue growth, three-year compound	15.0%	1.4%	7.4	446	2025-12-31
Free cash flow growth, three-year compound	106.1%	7.0%	3.9	234	2025-12-31
Reinvestment rate	(82.7%)	18.0%	90.3	249	2025-12-31
Asset growth, three years	38.6%	2.0%	2.0	448	2025-12-31
Net share issuance, one year	0.9%	(0.2%)	71.3	377	2026-02-23

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
241	Grocery Outlet Holding Corp. (GO)	56.7	C	
242	Helen OF Troy Ltd. (HELE)	56.9	C	
243	BlueLinx Holdings Inc. (BXC)	57.1	C/D	
244	Rocky Brands, Inc. (RCKY)	57.3	C/D	
245	Autozone Inc. (AZO)	57.6	C/D	
246	Somnigroup International Inc. (SGI)	57.6	C	
247	Kroger Co. (KR)	58.0	C/D	
248	Darling Ingredients Inc. (DAR)	58.1	C/D	
249	Starbucks Corp. (SBUX)	58.4	C/D	
250	Distribution Solutions Group, Inc. (DSGR)	58.8	C/D	
251	Jakks Pacific Inc. (JAKK)	59.0	C/D	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	(21.0%)	(1.3%)	30
Distance from 52-week high	(36.3%)	(22.8%)	32
EBIT to enterprise value	3.9%	4.9%	41
Free cash flow yield	4.4%	4.4%	50
Book value to price	0.32	0.46	38
Sales to price	0.52	1.42	19
Composite equity issuance, five years	5.6%	(16.9%)	81
Relative strength against the sector, log excess return	(0.15)	0.03	34
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 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	pass
Current ratio improved	fail
No new shares issued	fail
Gross margin improved	pass
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	n/a
Operating cash flow, four quarters	n/a
Months of runway	not finite
Days since last periodic filing	10 (10-Q received Nov 9, 2026)
Median daily dollar volume, 63 sessions	$195.0M

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	$3.2B	2025-12-31	2026-02-27	10-K	26-000015
2	assets	us-gaap:Assets	$11.6B	2025-12-31	2026-02-27	10-K	26-000015
3	operating income	us-gaap:OperatingIncomeLoss	$680.6M	2022-12-31	2025-02-28	10-K	25-000058
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$577.2M	2022-12-31	2024-02-16	10-K	24-000050
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$119.0M	2022-12-31	2025-02-28	10-K	25-000058
6	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$2.7B	2022-12-31	2024-02-16	10-K	24-000050
7	book equity	us-gaap:StockholdersEquityIncludingPortionAttributableT...	-$22.1M	2022-12-31	2026-02-27	10-K	26-000015
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$69.4M	2022-12-31	2023-02-17	10-K	23-000060
9	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$2.3B	2021-12-31	2023-02-17	10-K	23-000060
10	book equity	us-gaap:StockholdersEquity	$285.8M	2021-12-31	2022-02-22	10-K	22-000057
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$300.7M	2021-12-31	2023-02-17	10-K	23-000060
12	net income	us-gaap:NetIncomeLoss	$384.1M	2025-12-31	2026-02-27	10-K	26-000015
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$800.1M	2025-12-31	2026-02-27	10-K	26-000015
14	assets	us-gaap:Assets	$6.0B	2024-12-31	2026-02-27	10-K	26-000015
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$7.5B	2025-12-31	2026-02-27	10-K	26-000015
16	gross profit	us-gaap:GrossProfit	$2.0B	2024-12-31	2026-02-27	10-K	26-000015
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.9B	2024-12-31	2026-02-27	10-K	26-000015
18	gross profit	us-gaap:GrossProfit	$2.0B	2023-12-31	2026-02-27	10-K	26-000015
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.9B	2023-12-31	2026-02-27	10-K	26-000015
20	gross profit	us-gaap:GrossProfit	$2.0B	2022-12-31	2025-02-28	10-K	25-000058
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.9B	2022-12-31	2025-02-28	10-K	25-000058
22	gross profit	us-gaap:GrossProfit	$2.2B	2021-12-31	2024-02-16	10-K	24-000050
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.9B	2021-12-31	2024-02-16	10-K	24-000050
24	current assets	us-gaap:AssetsCurrent	$1.3B	2025-12-31	2026-02-27	10-K	26-000015
25	current liabilities	us-gaap:LiabilitiesCurrent	$1.6B	2025-12-31	2026-02-27	10-K	26-000015
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$3.8B	2025-12-31	2026-02-27	10-K	26-000015
27	operating income	us-gaap:OperatingIncomeLoss	$754.9M	2025-12-31	2026-02-27	10-K	26-000015
28	book equity	us-gaap:StockholdersEquityIncludingPortionAttributableT...	$3.1B	2025-12-31	2026-02-27	10-K	26-000015
29	liabilities	us-gaap:Liabilities	$8.5B	2025-12-31	2026-02-27	10-K	26-000015
30	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$180.2M	2022-12-31	2025-02-28	10-K	25-000058
31	operating income	us-gaap:OperatingIncomeLoss	$607.2M	2023-12-31	2026-02-27	10-K	26-000015

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32	interest expense	us-gaap:InterestExpense	$129.9M	2023-12-31	2024-02-16	10-K	24-000050
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$166.9M	2025-12-31	2026-02-27	10-K	26-000015
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesC...	$666.5M	2024-12-31	2025-02-28	10-K	25-000058
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$97.3M	2024-12-31	2026-02-27	10-K	26-000015
36	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesC...	$570.3M	2023-12-31	2025-02-28	10-K	25-000058
37	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$185.4M	2023-12-31	2026-02-27	10-K	26-000015
38	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$378.8M	2022-12-31	2023-02-17	10-K	23-000060
39	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$306.5M	2022-12-31	2025-02-28	10-K	25-000058
40	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$290.5M	2025-12-31	2026-02-27	10-K	26-000015
41	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$481.0M	2025-12-31	2026-02-27	10-K	26-000015
42	income tax	us-gaap:IncomeTaxExpenseBenefit	$95.7M	2025-12-31	2026-02-27	10-K	26-000015
43	current assets	us-gaap:AssetsCurrent	$1.1B	2024-12-31	2026-02-27	10-K	26-000015
44	current liabilities	us-gaap:LiabilitiesCurrent	$960.3M	2024-12-31	2026-02-27	10-K	26-000015
45	assets	us-gaap:Assets	$4.6B	2023-12-31	2025-02-28	10-K	25-000058
46	assets	us-gaap:Assets	$4.4B	2022-12-31	2024-02-16	10-K	24-000050
47	shares outstanding	dei:EntityCommonStockSharesOutstanding	210,340,624	2026-02-23	2026-02-27	10-K	26-000015
48	shares outstanding	dei:EntityCommonStockSharesOutstanding	208,524,132	2025-02-25	2025-02-28	10-K	25-000058

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