Estee Lauder Companies Inc. EL

NYSE; chemicals; SIC 2844, Perfumes, Cosmetics & Other Toilet Preparations; CIK 0001001250

D

fourth fifth of 319 graded peers in the pooled industrial group

rank 220 of 319; percentile 73.0; sampling error 2.7 points; lower is stronger

A B C D E

D, the sloth



Scoreboard

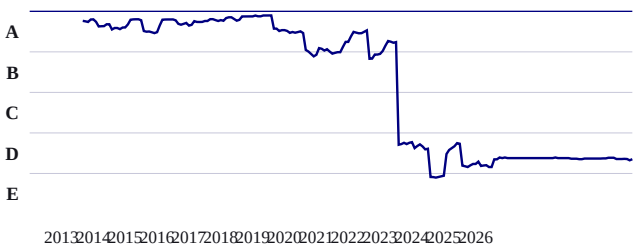
Profitability	B percentile 22.9
Solvency	E percentile 84.7
Growth and financing	D percentile 69.4
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $19.8B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: dilution, short runway, distress
Inputs computable	8 of 13
Graded from	filings received through Aug 19, 2026 93 days before the rescan; latest periodic filing 10-Q received Nov 2, 2026
Last close	$101.78 2026-11-19; market equity $0; 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 Aug 19, 2026

The Estée Lauder Companies Inc., founded in 1946 by Estée and Joseph Lauder, is one of the world's leading manufacturers, marketers and sellers of quality skin care, makeup, fragrance and hair care products. We are a steward of over 20 luxury and prestige brands globally. Since the initial launch of the Estée Lauder brand in the United States, we have significantly expanded our consumer reach to approximately 150 countries and territories.

The thirteen inputs

lower percentile is stronger; sleeves and inputs within a sleeve carry equal weight

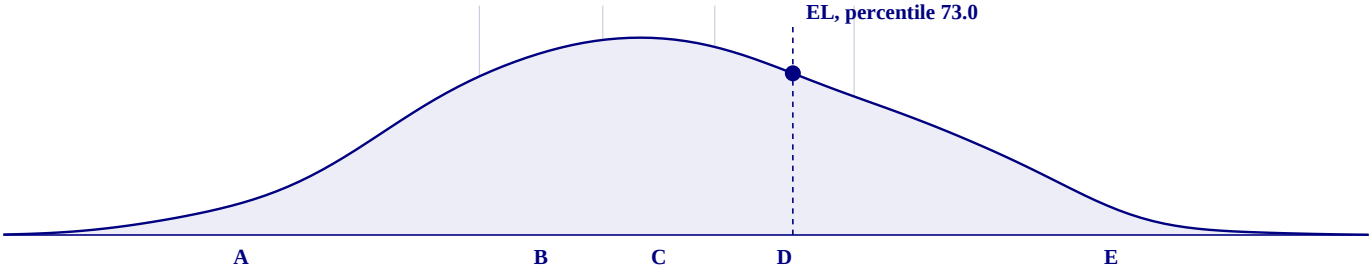
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 22.9						
Gross profitability	57.5%	21.9%		3.5	348	2026-06-30
Return on invested capital	not computable	9.6%				
latest aligned inputs end 2018-06-30; latest annual assets end 2026-06-30						
Accruals ratio	(8.0%)	(4.3%)		28.0	372	2026-06-30

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Gross margin stability, five years	1.9 pts	2.2 pts	37.1	292	2026-06-30
Solvency, sleeve percentile 84.7					
Altman Z double-prime	not computable	3.50			
latest aligned inputs end 2019-06-30; latest annual assets end 2026-06-30					
Net debt to EBITDA	not computable	1.83x			
latest aligned inputs end 2018-06-30; latest annual assets end 2026-06-30					
Interest coverage	not computable	4.55x			
latest aligned inputs end 2024-06-30; latest annual assets end 2026-06-30					
Current ratio	1.22x	2.21x	84.7	392	2026-06-30
Growth and financing, sleeve percentile 69.4					
Revenue growth, three-year compound	(1.8%)	1.4%	64.3	340	2026-06-30
Free cash flow growth, three-year compound	21.8%	12.5%	34.8	179	2026-06-30
Reinvestment rate	(215.6%)	21.5%	97.0	170	2026-06-30
Asset growth, three years	(5.5%)	2.9%	81.3	349	2026-06-30
Net share issuance, one year	not computable	(0.04%)			
two annual share counts are required; found 0					

Among 319 peers

chemicals; 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
215	Westinghouse AIR Brake Technologies Corp. (WAB)	71.4	D	
216	JBT Marel Corp. (JBTM)	71.8	D	
217	Nike, Inc. (NKE)	72.2	D	
218	Comstock Inc. (LODE)	72.6	D	dilution, fortress balance sheet
219	Columbus Mckinnon Corp. (CMCO)	72.7	D	
220	Estee Lauder Companies Inc. (EL)	73.0	D	
221	Trimas Corp. (TRS)	73.1	D	late filer
222	Fuller H B Co. (FUL)	73.3	D	
223	Esab Corp. (ESAB)	73.5	D	
224	Loar Holdings Inc. (LOAR)	73.9	D	
225	FutureFuel Corp. (FF)	74.2	D	late filer

What the price implies

at the 2026-11-19 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(2.7%)	11.1%	34
Distance from 52-week high	(14.9%)	(28.1%)	77
EBIT to enterprise value	not computable	3.9%	
Free cash flow yield	not computable	3.5%	
Book value to price	not computable	0.41	
Sales to price	not computable	0.59	
Composite equity issuance, five years	not computable	(10.3%)	

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Relative strength against the sector, log excess return	(0.17)	(0.00)	29
Twelve-month failure probability, CHS model	not computable	0.04%	

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score None of 9, period end 2026-06-30	
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	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	18 (10-Q received Nov 2, 2026)
Median daily dollar volume, 63 sessions	$304.2M

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	$11.4B	2026-06-30	2026-08-19	10-K	26-000041
2	assets	us-gaap:Assets	$19.8B	2026-06-30	2026-08-19	10-K	26-000041
3	operating income	us-gaap:OperatingIncomeLoss	$2.1B	2018-06-30	2020-08-28	10-K	20-000065
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$2.0B	2018-06-30	2020-08-28	10-K	20-000065
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$863.0M	2018-06-30	2020-08-28	10-K	20-000065
6	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$3.4B	2018-06-30	2019-08-23	10-K	19-047085
7	book equity	us-gaap:StockholdersEquity	$4.7B	2018-06-30	2019-08-23	10-K	19-047085
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$2.2B	2018-06-30	2018-08-24	10-K	18-053494
9	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$3.4B	2017-06-30	2018-08-24	10-K	18-053494
10	book equity	us-gaap:StockholdersEquity	$4.4B	2017-06-30	2018-08-24	10-K	18-053494
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$1.1B	2017-06-30	2018-08-24	10-K	18-053494
12	net income	us-gaap:ProfitLoss	$182.0M	2026-06-30	2026-08-19	10-K	26-000041
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$1.8B	2026-06-30	2026-08-19	10-K	26-000041
14	assets	us-gaap:Assets	$19.9B	2025-06-30	2026-08-19	10-K	26-000041
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$15.0B	2026-06-30	2026-08-19	10-K	26-000041
16	gross profit	us-gaap:GrossProfit	$10.6B	2025-06-30	2026-08-19	10-K	26-000041
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$14.3B	2025-06-30	2026-08-19	10-K	26-000041
18	gross profit	us-gaap:GrossProfit	$11.2B	2024-06-30	2026-08-19	10-K	26-000041
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$15.6B	2024-06-30	2026-08-19	10-K	26-000041
20	gross profit	us-gaap:GrossProfit	$11.3B	2023-06-30	2025-08-20	10-K	25-000099
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$15.9B	2023-06-30	2025-08-20	10-K	25-000099
22	gross profit	us-gaap:GrossProfit	$13.4B	2022-06-30	2024-08-19	10-K	24-000116
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$17.7B	2022-06-30	2024-08-19	10-K	24-000116
24	current assets	us-gaap:AssetsCurrent	$7.2B	2019-06-30	2020-08-28	10-K	20-000065
25	current liabilities	us-gaap:LiabilitiesCurrent	$4.6B	2019-06-30	2020-08-28	10-K	20-000065
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$10.0B	2019-06-30	2021-08-27	10-K	21-000127
27	operating income	us-gaap:OperatingIncomeLoss	$2.3B	2019-06-30	2021-08-27	10-K	21-000127
28	book equity	us-gaap:StockholdersEquity	$4.4B	2019-06-30	2021-08-27	10-K	21-000127
29	assets	us-gaap:Assets	$13.2B	2019-06-30	2021-08-27	10-K	21-000127

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30	liabilities	us-gaap:Liabilities	$8.7B	2019-06-30	2021-08-27	10-K	21-000127
31	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$531.0M	2018-06-30	2020-08-28	10-K	20-000065
32	operating income	us-gaap:OperatingIncomeLoss	$970.0M	2024-06-30	2026-08-19	10-K	26-000041
33	interest expense	us-gaap:InterestExpense	$378.0M	2024-06-30	2024-08-19	10-K	24-000116
34	current assets	us-gaap:AssetsCurrent	$7.6B	2026-06-30	2026-08-19	10-K	26-000041
35	current liabilities	us-gaap:LiabilitiesCurrent	$6.2B	2026-06-30	2026-08-19	10-K	26-000041
36	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$457.0M	2026-06-30	2026-08-19	10-K	26-000041
37	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$1.3B	2025-06-30	2026-08-19	10-K	26-000041
38	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$602.0M	2025-06-30	2026-08-19	10-K	26-000041
39	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$2.4B	2024-06-30	2026-08-19	10-K	26-000041
40	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$919.0M	2024-06-30	2026-08-19	10-K	26-000041
41	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$1.7B	2023-06-30	2025-08-20	10-K	25-000099
42	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$1.0B	2023-06-30	2025-08-20	10-K	25-000099
43	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$796.0M	2026-06-30	2026-08-19	10-K	26-000041
44	operating income	us-gaap:OperatingIncomeLoss	$780.0M	2026-06-30	2026-08-19	10-K	26-000041
45	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$517.0M	2026-06-30	2026-08-19	10-K	26-000041
46	income tax	us-gaap:IncomeTaxExpenseBenefit	$335.0M	2026-06-30	2026-08-19	10-K	26-000041
47	current assets	us-gaap:AssetsCurrent	$7.1B	2025-06-30	2026-08-19	10-K	26-000041
48	current liabilities	us-gaap:LiabilitiesCurrent	$5.4B	2025-06-30	2026-08-19	10-K	26-000041
49	assets	us-gaap:Assets	$21.7B	2024-06-30	2025-08-20	10-K	25-000099
50	assets	us-gaap:Assets	$23.4B	2023-06-30	2024-08-19	10-K	24-000116

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