Compass Minerals International Inc. CMP

NYSE; other; SIC 1400, Mining & Quarrying of Nonmetallic Minerals (No Fuels); CIK 0001227654

C/D

on the C/D boundary of 315 graded peers in other

rank 185 of 315; percentile 58.6; sampling error 2.7 points; lower is stronger

A B C D E

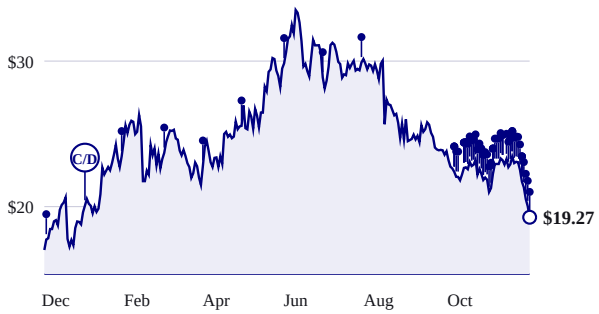
C/D, the tortoise



Scoreboard

Profitability	C	percentile 44.3
Solvency	C	percentile 56.3
Growth and financing	C	percentile 53.1
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 $1.5B
Standard universe	inside	revenue above $1M and assets above $10M
Warnings	none triggered	not computable: distress
Inputs computable	8 of 13	
Graded from	filings received through Dec 12, 2025	344 days before the rescan; latest periodic filing 10-Q received Aug 6, 2026
Last close	$19.25	2026-11-20; market equity $807.9M; 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 Dec 12, 2025

Compass Minerals International, Inc. through its subsidiaries is a leading provider of essential minerals, primarily salt and plant nutrition. Our production sites are located in the United States ("U.S."), Canada and the United Kingdom ("UK"). The Company also provides records management services in the UK. Our back-to-basics strategy focuses on improving cash flow generation and returns on capital in our core Salt and Plant Nutrition businesses through cost management and appropriate flexibility in capital intensity.

The thirteen inputs

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

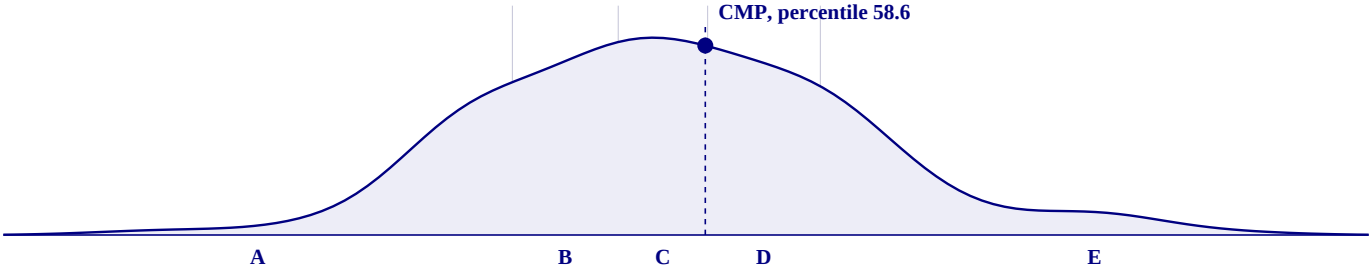
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 44.3						
Gross profitability	12.6%	26.7%		75.0	265	2025-09-30
Return on invested capital	not computable	10.0%				
pretax income must exceed the validity floor and imply a 0%-100% tax rate						
Accruals ratio	(17.6%)	(5.7%)		13.6	458	2025-09-30

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Gross margin stability, five years	not computable	2.2 pts				
five consecutive annual gross margins are required						
Solvency, sleeve percentile 56.3						
Altman Z double-prime	not computable	2.06				
one or more required annual facts are missing						
Net debt to EBITDA	6.07x	2.37x	86.6	173	2025-09-30	
Interest coverage	not computable	2.93x				
latest aligned inputs end 2023-09-30; latest annual assets end 2025-09-30						
Current ratio	2.15x	1.33x	26.0	462	2025-09-30	
Growth and financing, sleeve percentile 53.1						
Revenue growth, three-year compound	(0.03%)	4.9%	66.7	376	2025-09-30	
Free cash flow growth, three-year compound	75.2%	8.7%	5.7	213	2025-09-30	
Reinvestment rate	not computable	13.3%				
pretax income must exceed the validity floor and imply a 0%-100% tax rate						
Asset growth, three years	(2.8%)	4.1%	77.3	402	2025-09-30	
Net share issuance, one year	0.9%	(0.5%)	62.6	354	2025-12-08	

Among 315 peers

other; 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
180	Delta AIR Lines, Inc. (DAL)	57.0	C	
181	Equifax Inc. (EFX)	57.3	C/D	
182	GEE Group Inc. (JOB)	57.6	C/D	
183	Republic Services, Inc. (RSG)	58.0	C/D	
184	ManpowerGroup Inc. (MAN)	58.3	C/D	
185	Compass Minerals International Inc. (CMP)	58.6	C/D	
186	Strata Critical Medical, Inc. (SRTA)	58.9	C/D	fortress balance sheet
187	Heritage Global Inc. (HGBL)	59.2	C/D	fortress balance sheet
188	TrueBlue, Inc. (TBI)	59.6	C/D	short runway, fortress balance sheet
189	International Seaways, Inc. (INSW)	59.9	C/D	
190	Xponential Fitness, Inc. (XPOF)	60.2	C/D	

What the price implies

at the 2026-11-20 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	27.1%	0.4%	74
Distance from 52-week high	(42.5%)	(28.8%)	31
EBIT to enterprise value	1.7%	4.6%	25
Free cash flow yield	15.8%	4.1%	91
Book value to price	0.33	0.39	44
Sales to price	1.54	0.75	71
Composite equity issuance, five years	13.7%	(9.5%)	79

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Relative strength against the sector, log excess return	0.12	(0.12)	74
Twelve-month failure probability, CHS model	not computable	0.04%	

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 4 of 9, period end 2025-09-30	
Return on assets above zero	fail
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	fail
Gross margin improved	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$56.3M
Operating cash flow, four quarters	$155.9M
Months of runway	not finite
Days since last periodic filing	107 (10-Q received Aug 6, 2026)
Median daily dollar volume, 63 sessions	$8.3M

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	$190.7M	2025-09-30	2025-12-12	10-K	25-000199
2	assets	us-gaap:Assets	$1.5B	2025-09-30	2025-12-12	10-K	25-000199
3	operating income	us-gaap:OperatingIncomeLoss	$25.3M	2025-09-30	2025-12-12	10-K	25-000199
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$53.7M	2025-09-30	2025-12-12	10-K	25-000199
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$26.1M	2025-09-30	2025-12-12	10-K	25-000199
6	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$839.8M	2025-09-30	2025-12-12	10-K	25-000199
7	book equity	us-gaap:StockholdersEquity	$234.1M	2025-09-30	2025-12-12	10-K	25-000199
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$59.7M	2025-09-30	2025-12-12	10-K	25-000199
9	total debt	us-gaap:LongTermDebt	$917.5M	2024-09-30	2024-12-16	10-K	24-000230
10	book equity	us-gaap:StockholdersEquity	$316.6M	2024-09-30	2025-12-12	10-K	25-000199
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$20.2M	2024-09-30	2025-12-12	10-K	25-000199
12	net income	us-gaap:NetIncomeLoss	-$79.8M	2025-09-30	2025-12-12	10-K	25-000199
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$197.7M	2025-09-30	2025-12-12	10-K	25-000199
14	assets	us-gaap:Assets	$1.6B	2024-09-30	2025-12-12	10-K	25-000199
15	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$103.2M	2025-09-30	2025-12-12	10-K	25-000199
16	operating income	us-gaap:OperatingIncomeLoss	$77.4M	2023-09-30	2025-12-12	10-K	25-000199
17	interest expense	us-gaap:InterestExpense	$55.5M	2023-09-30	2024-10-29	10-K/A	24-000210
18	current assets	us-gaap:AssetsCurrent	$572.2M	2025-09-30	2025-12-12	10-K	25-000199
19	current liabilities	us-gaap:LiabilitiesCurrent	$265.6M	2025-09-30	2025-12-12	10-K	25-000199
20	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.2B	2025-09-30	2025-12-12	10-K	25-000199
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.1B	2024-09-30	2025-12-12	10-K	25-000199
22	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.2B	2023-09-30	2025-12-12	10-K	25-000199
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.2B	2022-09-30	2024-12-16	10-K	24-000230
24	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$69.7M	2025-09-30	2025-12-12	10-K	25-000199
25	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$14.4M	2024-09-30	2025-12-12	10-K	25-000199
26	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$114.2M	2024-09-30	2025-12-12	10-K	25-000199
27	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$106.0M	2023-09-30	2025-12-12	10-K	25-000199
28	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$154.3M	2023-09-30	2025-12-12	10-K	25-000199
29	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$120.4M	2022-09-30	2024-12-16	10-K	24-000230

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30	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$96.6M	2022-09-30	2024-12-16	10-K	24-000230
31	current assets	us-gaap:AssetsCurrent	$587.3M	2024-09-30	2025-12-12	10-K	25-000199
32	current liabilities	us-gaap:LiabilitiesCurrent	$217.0M	2024-09-30	2025-12-12	10-K	25-000199
33	assets	us-gaap:Assets	$1.8B	2023-09-30	2024-12-16	10-K	24-000230
34	assets	us-gaap:Assets	$1.7B	2022-09-30	2024-10-29	10-K/A	24-000210
35	shares outstanding	dei:EntityCommonStockSharesOutstanding	41,819,495	2025-12-08	2025-12-12	10-K	25-000199
36	shares outstanding	dei:EntityCommonStockSharesOutstanding	41,452,793	2024-12-11	2024-12-16	10-K	24-000230

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