ITT Inc.

ITT

NYSE; manufacturing; SIC 3561, Pumps & Pumping Equipment; CIK 0000216228

A

strongest fifth of 246 graded peers in manufacturing

rank 10 of 246; percentile 3.7; sampling error 3.0 points; lower is stronger

A B C D E

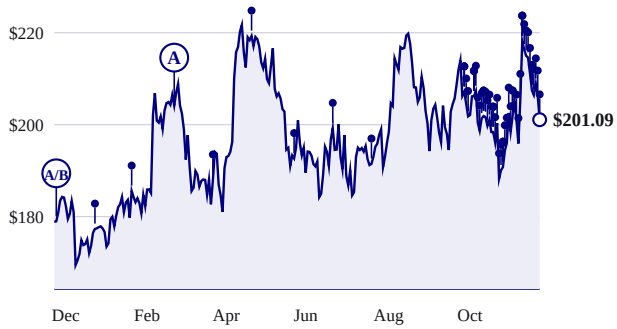
A, the bull



Scoreboard

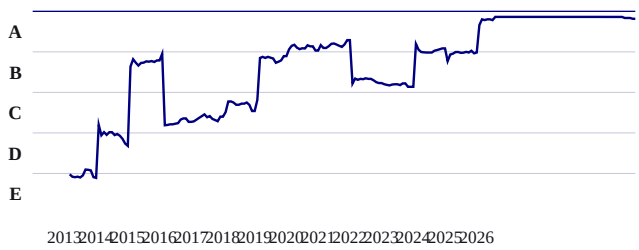
Profitability	B/C	percentile 37.5
Solvency	A/B	percentile 21.3
Growth and financing	B	percentile 28.4
Reliability	0.94 AUC	filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year	Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets	total assets $6.3B
Standard universe	inside	revenue above $1M and assets above $10M
Warnings	none triggered; fortress balance sheet	not computable: distress
Inputs computable	12 of 13	
Graded from	filings received through Feb 9, 2026	285 days before the rescan; latest periodic filing 10-Q received Nov 5, 2026
Last close	$201.25	2026-11-20; market equity $18.0B; 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 9, 2026

(Amounts reported in this Annual Report on Form 10-K, except per share amounts, are stated in millions unless otherwise specified. References herein to "ITT," the "Company," and such words as "we," "us," and "our" include ITT Inc. and its subsidiaries on a consolidated basis, unless the context otherwise indicates.) ITT is a diversified manufacturer of highly engineered critical components and customized technology solutions primarily for the transportation, industrial and energy markets. We manufacture components that are integral to the operation of equipment, systems and manufacturing processes in these key markets.

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 37.5						
Gross profitability	22.1%	22.3%		47.7	267	2025-12-31
Return on invested capital	19.0%	9.9%		19.6	98	2025-12-31
Accruals ratio	(3.3%)	(3.7%)		54.0	288	2025-12-31

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Gross margin stability, five years	1.6 pts	2.1 pts	28.5	222	2025-12-31
Solvency, sleeve percentile 21.3					
Altman Z double-prime	6.34	3.74	21.2	223	2025-12-31
Net debt to EBITDA	(1.48x)	1.75x	4.3	118	2025-12-31
Interest coverage	not computable	5.13x			
latest aligned inputs end 2014-12-31; latest annual assets end 2025-12-31					
Current ratio	2.58x	2.30x	38.5	302	2025-12-31
Growth and financing, sleeve percentile 28.4					
Revenue growth, three-year compound	9.6%	2.3%	24.2	261	2025-12-31
Free cash flow growth, three-year compound	46.6%	13.5%	13.0	139	2025-12-31
Reinvestment rate	287.0%	24.5%	5.8	140	2025-12-31
Asset growth, three years	18.6%	4.2%	13.3	265	2025-12-31
Net share issuance, one year	5.7%	(0.04%)	85.8	240	2026-02-06

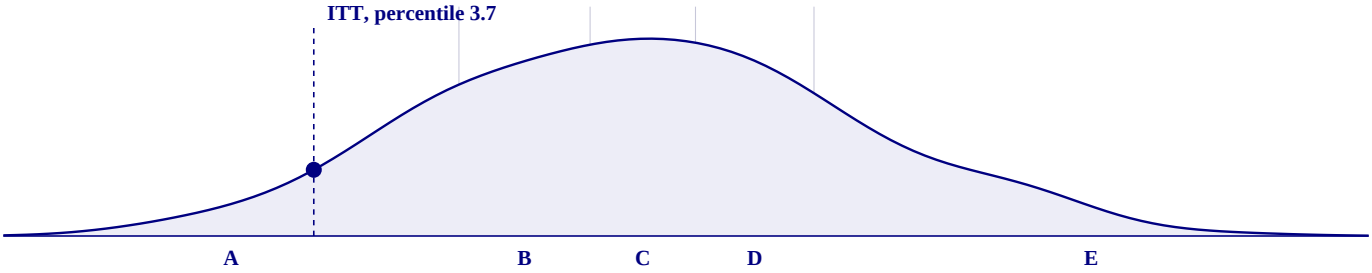
Warnings

1 of 7 checks triggered; none of them enters the letter

Check	Measured
Fortress balance sheet	cash minus debt is 1,221,400,000 USD; Altman Z is not used

Among 246 peers

manufacturing; 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
5	Deckers Outdoor Corp. (DECK)	1.6	A	
6	Proto Labs Inc. (PRLB)	2.0	A	fortress balance sheet
7	Azenta, Inc. (AZTA)	2.4	A	late filer, fortress balance sheet
8	Franklin Electric Co. Inc. (FELE)	2.9	A	
9	Energy Recovery, Inc. (ERII)	3.3	A	fortress balance sheet
10	ITT Inc. (ITT)	3.7	A	fortress balance sheet
11	Smith Midland Corp. (SMID)	4.1	A	late filer
12	Graco Inc. (GGG)	4.5	A	
13	Simpson Manufacturing Co., Inc. (SSD)	4.9	A	fortress balance sheet
14	Alamo Group Inc. (ALG)	5.3	A	fortress balance sheet
15	ACM Research, Inc. (ACMR)	5.7	A	fortress balance sheet

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	9.9%	10.0%	50
Distance from 52-week high	(9.3%)	(32.1%)	92
EBIT to enterprise value	3.4%	4.5%	39
Free cash flow yield	3.1%	3.8%	41
Book value to price	0.27	0.39	31

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Sales to price	0.22	0.60	12
Composite equity issuance, five years	(2.9%)	(9.5%)	60
Relative strength against the sector, log excess return	0.01	0.01	50
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	fail
Gross margin improved	pass
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$558.1M
Operating cash flow, four quarters	$771.4M
Months of runway	not finite
Days since last periodic filing	16 (10-Q received Nov 5, 2026)
Median daily dollar volume, 63 sessions	$154.0M

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	$1.4B	2025-12-31	2026-02-09	10-K	26-000012
2	assets	us-gaap:Assets	$6.3B	2025-12-31	2026-02-09	10-K	26-000012
3	operating income	us-gaap:OperatingIncomeLoss	$684.5M	2025-12-31	2026-02-09	10-K	26-000012
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$651.5M	2025-12-31	2026-02-09	10-K	26-000012
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$160.1M	2025-12-31	2026-02-09	10-K	26-000012
6	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$521.5M	2025-12-31	2026-02-09	10-K	26-000012
7	book equity	us-gaap:StockholdersEquity	$4.1B	2025-12-31	2026-02-09	10-K	26-000012
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$1.7B	2025-12-31	2026-02-09	10-K	26-000012
9	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$232.6M	2024-12-31	2026-02-09	10-K	26-000012
10	book equity	us-gaap:StockholdersEquity	$2.8B	2024-12-31	2026-02-09	10-K	26-000012
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$439.3M	2024-12-31	2026-02-09	10-K	26-000012
12	net income	us-gaap:NetIncomeLoss	$488.0M	2025-12-31	2026-02-09	10-K	26-000012
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesC...	$668.8M	2025-12-31	2026-02-09	10-K	26-000012
14	assets	us-gaap:Assets	$4.7B	2024-12-31	2026-02-09	10-K	26-000012
15	revenue	us-gaap:Revenues	$3.9B	2025-12-31	2026-02-09	10-K	26-000012
16	gross profit	us-gaap:GrossProfit	$1.2B	2024-12-31	2026-02-09	10-K	26-000012
17	revenue	us-gaap:Revenues	$3.6B	2024-12-31	2026-02-09	10-K	26-000012
18	gross profit	us-gaap:GrossProfit	$1.1B	2023-12-31	2026-02-09	10-K	26-000012
19	revenue	us-gaap:Revenues	$3.3B	2023-12-31	2026-02-09	10-K	26-000012
20	gross profit	us-gaap:GrossProfit	$922.3M	2022-12-31	2025-02-10	10-K	25-000014
21	revenue	us-gaap:Revenues	$3.0B	2022-12-31	2025-02-10	10-K	25-000014
22	gross profit	us-gaap:GrossProfit	$899.5M	2021-12-31	2024-02-12	10-K	24-000020
23	revenue	us-gaap:Revenues	$2.8B	2021-12-31	2024-02-12	10-K	24-000020
24	current assets	us-gaap:AssetsCurrent	$3.4B	2025-12-31	2026-02-09	10-K	26-000012
25	current liabilities	us-gaap:LiabilitiesCurrent	$1.3B	2025-12-31	2026-02-09	10-K	26-000012
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$3.0B	2025-12-31	2026-02-09	10-K	26-000012

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27	liabilities	us-gaap:Liabilities	$2.2B	2025-12-31	2026-02-09	10-K	26-000012
28	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$143.2M	2025-12-31	2026-02-09	10-K	26-000012
29	operating income	us-gaap:OperatingIncomeLoss	$266.4M	2014-12-31	2017-02-17	10-K	17-000006
30	interest expense	us-gaap:InterestExpense	$4.0M	2014-12-31	2015-02-20	10-K	15-000007
31	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$121.3M	2025-12-31	2026-02-09	10-K	26-000012
32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesC...	$562.6M	2024-12-31	2026-02-09	10-K	26-000012
33	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$123.9M	2024-12-31	2026-02-09	10-K	26-000012
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesC...	$538.0M	2023-12-31	2026-02-09	10-K	26-000012
35	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$107.6M	2023-12-31	2026-02-09	10-K	26-000012
36	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesC...	$277.7M	2022-12-31	2025-02-10	10-K	25-000014
37	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$103.9M	2022-12-31	2025-02-10	10-K	25-000014
38	current assets	us-gaap:AssetsCurrent	$1.9B	2024-12-31	2026-02-09	10-K	26-000012
39	current liabilities	us-gaap:LiabilitiesCurrent	$1.3B	2024-12-31	2026-02-09	10-K	26-000012
40	assets	us-gaap:Assets	$3.9B	2023-12-31	2025-02-10	10-K	25-000014
41	assets	us-gaap:Assets	$3.8B	2022-12-31	2024-02-12	10-K	24-000020
42	shares outstanding	dei:EntityCommonStockSharesOutstanding	86,000,000	2026-02-06	2026-02-09	10-K	26-000012
43	shares outstanding	dei:EntityCommonStockSharesOutstanding	81,400,000	2025-02-07	2025-02-10	10-K	25-000014