Pentair plc

PNR

NYSE; manufacturing; SIC 3550, Special Industry Machinery (No Metalworking Machinery); CIK 0000077360

C/D

on the C/D boundary of 246 graded peers in manufacturing

rank 142 of 246; percentile 57.6; sampling error 3.0 points; lower is stronger

A B C D E

C/D, the tortoise



Scoreboard

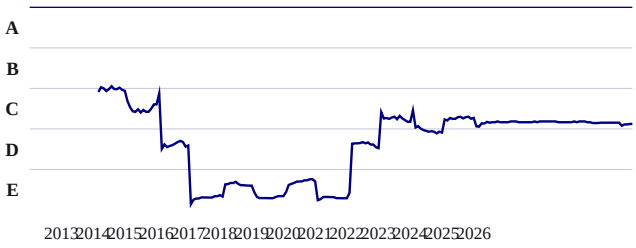
Profitability	C	percentile 52.6
Solvency	C	percentile 54.8
Growth and financing	C	percentile 47.3
Reliability	0.94 AUC	filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year	Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets	total assets $6.9B
Standard universe	inside	revenue above $1M and assets above $10M
Warnings	none triggered	not computable: distress
Inputs computable	10 of 13	
Graded from	filings received through Feb 24, 2026	270 days before the rescan; latest periodic filing 10-Q received Oct 27, 2026
Last close	$68.63	2026-11-20; market equity $11.0B; 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 24, 2026

Unless the context otherwise indicates, references herein to "Pentair," the "Company," and such words as "we," "us," and "our" include Pentair plc and its consolidated subsidiaries. At Pentair, we help the world sustainably move, improve and enjoy water, life's most essential resource. From our residential and commercial water solutions to industrial water management and everything in between, Pentair is an S&P 500 company focused on smart, sustainable water solutions that help our planet and people thrive. Our vision is to be the world's most valued sustainable water solutions company for our employees, customers and shareholders.

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 52.6						
Gross profitability	24.6%	22.3%		36.8	267	2025-12-31
Return on invested capital	not computable	9.9%				

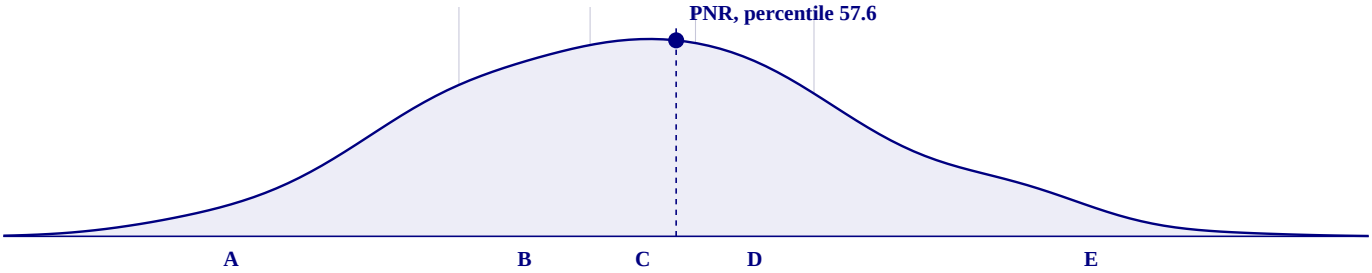
latest aligned inputs end 2019-12-31; latest annual assets end 2025-12-31

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Accruals ratio	(2.4%)	(3.7%)	62.0	288	2025-12-31
Gross margin stability, five years	2.7 pts	2.1 pts	58.8	222	2025-12-31
Solvency, sleeve percentile 54.8					
Altman Z double-prime	4.09	3.74	39.2	223	2025-12-31
Net debt to EBITDA	not computable	1.75x			
latest aligned inputs end 2019-12-31; latest annual assets end 2025-12-31					
Interest coverage	not computable	5.13x			
latest aligned inputs end 2019-12-31; latest annual assets end 2025-12-31					
Current ratio	1.61x	2.30x	70.4	302	2025-12-31
Growth and financing, sleeve percentile 47.3					
Revenue growth, three-year compound	0.4%	2.3%	60.8	261	2025-12-31
Free cash flow growth, three-year compound	38.9%	13.5%	15.9	139	2025-12-31
Reinvestment rate	6.9%	24.5%	61.9	140	2025-12-31
Asset growth, three years	2.1%	4.2%	62.1	265	2025-12-31
Net share issuance, one year	(1.0%)	(0.04%)	36.0	240	2025-12-31

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
137	General Dynamics Corp. (GD)	55.5	C	
138	Dover Corp. (DOV)	55.9	C	
139	nVent Electric plc (NVT)	56.3	C	
140	Insteel Industries Inc. (IIIN)	56.7	C	
141	Steel Dynamics Inc. (STLD)	57.1	C/D	
142	Pentair plc (PNR)	57.6	C/D	
143	Kaiser Aluminum Corp. (KALU)	58.0	C/D	fortress balance sheet
144	Ingersoll Rand Inc. (IR)	58.4	C/D	
145	RBC Bearings Inc. (RBC)	58.8	C/D	
146	Lockheed Martin Corp. (LMT)	59.2	C/D	
147	Lifetime Brands, Inc. (LCUT)	59.6	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	(49.7%)	10.0%	6
Distance from 52-week high	(36.5%)	(32.1%)	41
EBIT to enterprise value	6.9%	4.5%	79
Free cash flow yield	6.8%	3.8%	79
Book value to price	0.35	0.39	44
Sales to price	0.38	0.60	30
Composite equity issuance, five years	(12.0%)	(9.5%)	43
Relative strength against the sector, log excess return	(0.77)	0.01	6

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Twelve-month failure probability, CHS model	not computable	0.04%

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 9 of 9, period end 2025-12-31	
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	pass
No new shares issued	pass
Gross margin improved	pass
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$74.0M
Operating cash flow, four quarters	$724.5M
Months of runway	not finite
Days since last periodic filing	25 (10-Q received Oct 27, 2026)
Median daily dollar volume, 63 sessions	$146.4M

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	$1.7B	2025-12-31	2026-02-24	10-K	26-000007
2	assets	us-gaap:Assets	$6.9B	2025-12-31	2026-02-24	10-K	26-000007
3	operating income	us-gaap:OperatingIncomeLoss	$432.5M	2019-12-31	2022-02-22	10-K	22-000006
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$407.5M	2019-12-31	2022-02-22	10-K	22-000006
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$45.8M	2019-12-31	2022-02-22	10-K	22-000006
6	total debt	us-gaap:LongTermDebt	$1.0B	2019-12-31	2021-02-16	10-K	21-000005
7	book equity	us-gaap:StockholdersEquityIncludingPortionAttributableT...	$2.0B	2019-12-31	2023-02-21	10-K	23-000006
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$82.5M	2019-12-31	2020-02-25	10-K	20-000006
9	total debt	us-gaap:LongTermDebt	$787.6M	2018-12-31	2020-02-25	10-K	20-000006
10	book equity	us-gaap:StockholdersEquityIncludingPortionAttributableT...	$1.8B	2018-12-31	2022-02-22	10-K	22-000006
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$74.3M	2018-12-31	2020-02-25	10-K	20-000006
12	net income	us-gaap:NetIncomeLoss	$653.8M	2025-12-31	2026-02-24	10-K	26-000007
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$814.8M	2025-12-31	2026-02-24	10-K	26-000007
14	assets	us-gaap:Assets	$6.4B	2024-12-31	2026-02-24	10-K	26-000007
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.2B	2025-12-31	2026-02-24	10-K	26-000007
16	gross profit	us-gaap:GrossProfit	$1.6B	2024-12-31	2026-02-24	10-K	26-000007
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.1B	2024-12-31	2026-02-24	10-K	26-000007
18	gross profit	us-gaap:GrossProfit	$1.5B	2023-12-31	2026-02-24	10-K	26-000007
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.1B	2023-12-31	2026-02-24	10-K	26-000007
20	gross profit	us-gaap:GrossProfit	$1.4B	2022-12-31	2025-02-25	10-K	25-000006
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.1B	2022-12-31	2025-02-25	10-K	25-000006
22	gross profit	us-gaap:GrossProfit	$1.3B	2021-12-31	2024-02-20	10-K	24-000007
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$3.8B	2021-12-31	2024-02-20	10-K	24-000007
24	current assets	us-gaap:AssetsCurrent	$1.5B	2025-12-31	2026-02-24	10-K	26-000007
25	current liabilities	us-gaap:LiabilitiesCurrent	$959.3M	2025-12-31	2026-02-24	10-K	26-000007
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$2.8B	2025-12-31	2026-02-24	10-K	26-000007
27	operating income	us-gaap:OperatingIncomeLoss	$857.5M	2025-12-31	2026-02-24	10-K	26-000007
28	book equity	us-gaap:StockholdersEquityIncludingPortionAttributableT...	$3.9B	2025-12-31	2026-02-24	10-K	26-000007
29	liabilities	us-gaap:Liabilities	$3.0B	2025-12-31	2026-02-24	10-K	26-000007
30	depreciation amortization	us-gaap:Depreciation	$48.3M	2019-12-31	2022-02-22	10-K	22-000006

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31	interest expense	us-gaap:InterestExpense	$30.1M	2019-12-31	2020-02-25	10-K	20-000006
32	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$68.8M	2025-12-31	2026-02-24	10-K	26-000007
33	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$766.7M	2024-12-31	2026-02-24	10-K	26-000007
34	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$74.4M	2024-12-31	2026-02-24	10-K	26-000007
35	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$619.2M	2023-12-31	2026-02-24	10-K	26-000007
36	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$76.0M	2023-12-31	2026-02-24	10-K	26-000007
37	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$363.3M	2022-12-31	2025-02-25	10-K	25-000006
38	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$85.2M	2022-12-31	2025-02-25	10-K	25-000006
39	depreciation amortization	us-gaap:Depreciation	$59.6M	2025-12-31	2026-02-24	10-K	26-000007
40	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$756.5M	2025-12-31	2026-02-24	10-K	26-000007
41	income tax	us-gaap:IncomeTaxExpenseBenefit	$107.0M	2025-12-31	2026-02-24	10-K	26-000007
42	current assets	us-gaap:AssetsCurrent	$1.4B	2024-12-31	2026-02-24	10-K	26-000007
43	current liabilities	us-gaap:LiabilitiesCurrent	$895.1M	2024-12-31	2026-02-24	10-K	26-000007
44	assets	us-gaap:Assets	$6.6B	2023-12-31	2026-02-24	10-K	26-000007
45	assets	us-gaap:Assets	$6.4B	2022-12-31	2025-02-25	10-K	25-000006
46	shares outstanding	dei:EntityCommonStockSharesOutstanding	163,235,706	2025-12-31	2026-02-24	10-K	26-000007
47	shares outstanding	dei:EntityCommonStockSharesOutstanding	164,817,183	2024-12-31	2025-02-25	10-K	25-000006

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