Regal Rexnord Corp.

RRX

NYSE; manufacturing; SIC 3569, General Industrial Machinery & Equipment, NEC; CIK 0000082811

D/E

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

rank 198 of 246; percentile 80.4; sampling error 3.0 points; lower is stronger

A B C D E

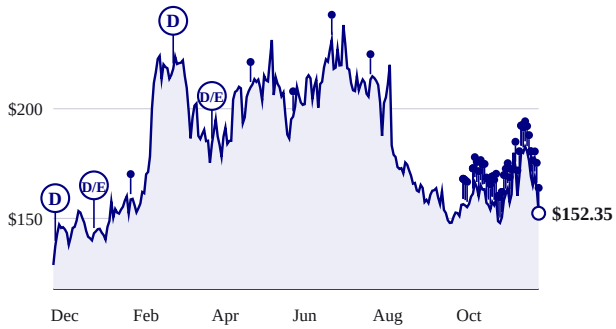
D/E, the sloth



Scoreboard

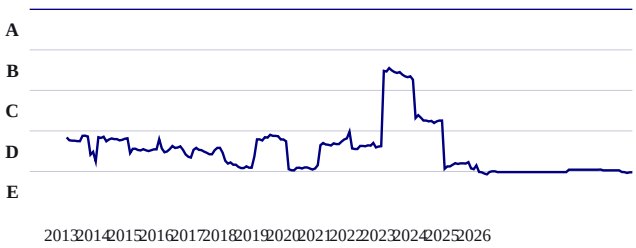
Profitability	C/D	percentile 62.8
Solvency	D	percentile 72.0
Growth and financing	C	percentile 45.4
Reliability	0.94 AUC	filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year	Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets	total assets $13.9B
Standard universe	inside	revenue above $1M and assets above $10M
Warnings	none triggered	not computable: distress
Inputs computable	11 of 13	
Graded from	filings received through Feb 20, 2026	274 days before the rescan; latest periodic filing 10-Q received Nov 3, 2026
Last close	$152.32	2026-11-20; market equity $10.1B; 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 20, 2026

Regal Rexnord Corporation (NYSE: RRX) ("we," "us," "our" or the "Company") and its associates around the world help create a better tomorrow by providing sustainable solutions that power, transmit and control motion. The Company's electric motors and air moving subsystems provide the power to create motion. A portfolio of highly engineered power transmission components and subsystems efficiently transmits motion to power industrial applications. The Company's automation offering, comprised of controllers, drives, precision motors, and actuators, controls motion in applications ranging from factory automation to precision tools used in surgical applications.

The thirteen inputs

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

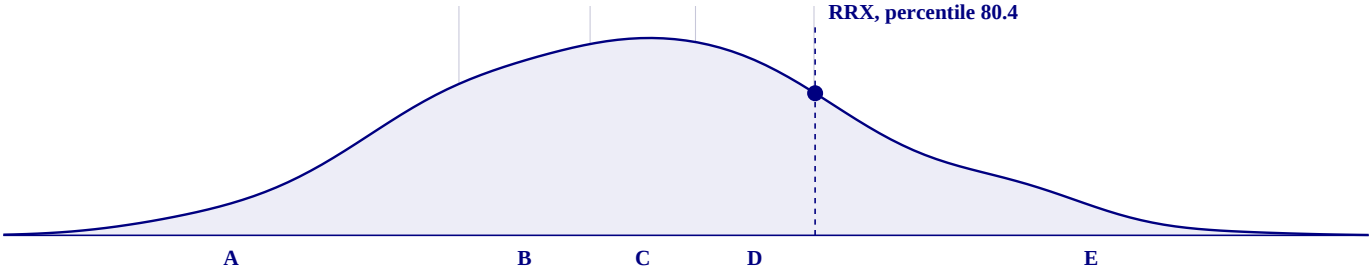
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 62.8						
Gross profitability	15.9%	22.3%		70.7	267	2025-12-31
Return on invested capital	4.8%	9.9%		76.3	98	2025-12-31

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Accruals ratio	(5.1%)	(3.7%)	39.0	288	2025-12-31
Gross margin stability, five years	3.0 pts	2.1 pts	65.2	222	2025-12-31
Solvency, sleeve percentile 72.0					
Altman Z double-prime	not computable	3.74			
one or more required annual facts are missing					
Net debt to EBITDA	5.14x	1.75x	91.5	118	2025-12-31
Interest coverage	not computable	5.13x			
latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31					
Current ratio	2.15x	2.30x	52.5	302	2025-12-31
Growth and financing, sleeve percentile 45.4					
Revenue growth, three-year compound	4.4%	2.3%	38.1	261	2025-12-31
Free cash flow growth, three-year compound	36.3%	13.5%	18.8	139	2025-12-31
Reinvestment rate	(26.6%)	24.5%	81.3	140	2025-12-31
Asset growth, three years	10.7%	4.2%	26.1	265	2025-12-31
Net share issuance, one year	0.3%	(0.04%)	62.8	240	2026-02-18

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
193	Mativ Holdings, Inc. (MATV)	78.4	D/E	
194	Emerson Electric Co. (EMR)	78.8	D/E	
195	Otis Worldwide Corp. (OTIS)	79.2	D/E	
196	Silgan Holdings Inc. (SLGN)	79.6	D/E	
197	NN Inc. (NNBR)	80.0	D/E	
198	Regal Rexnord Corp. (RRX)	80.4	D/E	
199	Mercer International Inc. (MERC)	80.8	D/E	
200	Northern Technologies International Corp. (NTIC)	81.2	D/E	
201	Redwire Corp. (RDW)	81.6	D/E	dilution, fortress balance sheet
202	Fuelcell Energy Inc. (FCEL)	82.0	D/E	fortress balance sheet
203	American Superconductor Corp. (AMSC)	82.4	D/E	

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	11.0%	10.0%	51
Distance from 52-week high	(36.0%)	(32.1%)	41
EBIT to enterprise value	4.7%	4.5%	51
Free cash flow yield	8.8%	3.8%	87
Book value to price	0.68	0.39	70
Sales to price	0.58	0.60	49
Composite equity issuance, five years	38.9%	(9.5%)	89
Relative strength against the sector, log excess return	0.02	0.01	51

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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 7 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	fail
No new shares issued	fail
Gross margin improved	pass
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$449.6M
Operating cash flow, four quarters	$579.2M
Months of runway	not finite
Days since last periodic filing	18 (10-Q received Nov 3, 2026)
Median daily dollar volume, 63 sessions	$178.7M

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	$2.2B	2025-12-31	2026-02-20	10-K	26-000054
2	assets	us-gaap:Assets	$13.9B	2025-12-31	2026-02-20	10-K	26-000054
3	operating income	us-gaap:OperatingIncomeLoss	$680.8M	2025-12-31	2026-02-20	10-K	26-000054
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$352.5M	2025-12-31	2026-02-20	10-K	26-000054
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$71.7M	2025-12-31	2026-02-20	10-K	26-000054
6	total debt	us-gaap:LongTermDebt	$4.8B	2025-12-31	2026-02-20	10-K	26-000054
7	book equity	us-gaap:StockholdersEquity	$6.8B	2025-12-31	2026-02-20	10-K	26-000054
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$521.7M	2025-12-31	2026-02-20	10-K	26-000054
9	total debt	us-gaap:LongTermDebt	$5.5B	2024-12-31	2025-02-21	10-K	25-000046
10	book equity	us-gaap:StockholdersEquity	$6.3B	2024-12-31	2026-02-20	10-K	26-000054
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$393.5M	2024-12-31	2026-02-20	10-K	26-000054
12	net income	us-gaap:NetIncomeLoss	$279.5M	2025-12-31	2026-02-20	10-K	26-000054
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$990.8M	2025-12-31	2026-02-20	10-K	26-000054
14	assets	us-gaap:Assets	$14.0B	2024-12-31	2026-02-20	10-K	26-000054
15	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$5.9B	2025-12-31	2026-02-20	10-K	26-000054
16	gross profit	us-gaap:GrossProfit	$2.2B	2024-12-31	2026-02-20	10-K	26-000054
17	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$6.0B	2024-12-31	2026-02-20	10-K	26-000054
18	gross profit	us-gaap:GrossProfit	$2.1B	2023-12-31	2026-02-20	10-K	26-000054
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$6.3B	2023-12-31	2024-02-26	10-K	24-000035
20	gross profit	us-gaap:GrossProfit	$1.7B	2022-12-31	2025-02-21	10-K	25-000046
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$5.2B	2022-12-31	2024-02-26	10-K	24-000035
22	gross profit	us-gaap:GrossProfit	$1.1B	2022-01-01	2024-02-26	10-K	24-000035
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$3.8B	2022-01-01	2024-02-26	10-K	24-000035
24	depreciation amortization	us-gaap:Depreciation	$154.5M	2025-12-31	2026-02-20	10-K	26-000054
25	operating income	us-gaap:OperatingIncomeLoss	$377.1M	2023-12-31	2026-02-20	10-K	26-000054
26	interest expense	us-gaap:InterestExpense	$431.0M	2023-12-31	2024-02-26	10-K	24-000035
27	current assets	us-gaap:AssetsCurrent	$2.7B	2025-12-31	2026-02-20	10-K	26-000054
28	current liabilities	us-gaap:LiabilitiesCurrent	$1.3B	2025-12-31	2026-02-20	10-K	26-000054
29	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$97.7M	2025-12-31	2026-02-20	10-K	26-000054
30	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$609.4M	2024-12-31	2026-02-20	10-K	26-000054

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31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$109.5M	2024-12-31	2026-02-20	10-K	26-000054
32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$715.3M	2023-12-31	2026-02-20	10-K	26-000054
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$119.1M	2023-12-31	2026-02-20	10-K	26-000054
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$436.2M	2022-12-31	2025-02-21	10-K	25-000046
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$83.8M	2022-12-31	2025-02-21	10-K	25-000046
36	current assets	us-gaap:AssetsCurrent	$2.8B	2024-12-31	2026-02-20	10-K	26-000054
37	current liabilities	us-gaap:LiabilitiesCurrent	$1.2B	2024-12-31	2026-02-20	10-K	26-000054
38	assets	us-gaap:Assets	$15.4B	2023-12-31	2025-02-21	10-K	25-000046
39	assets	us-gaap:Assets	$10.3B	2022-12-31	2024-02-26	10-K	24-000035
40	shares outstanding	dei:EntityCommonStockSharesOutstanding	66,499,582	2026-02-18	2026-02-20	10-K	26-000054
41	shares outstanding	dei:EntityCommonStockSharesOutstanding	66,268,365	2025-02-19	2025-02-21	10-K	25-000046

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