TransDigm Group Inc.

TDG

NYSE; manufacturing; SIC 3728, Aircraft Parts & Auxiliary Equipment, NEC; CIK 0001260221

B/C

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

rank 102 of 246; percentile 41.2; sampling error 3.0 points; lower is stronger

A B C D E

B/C, the elk



Scoreboard

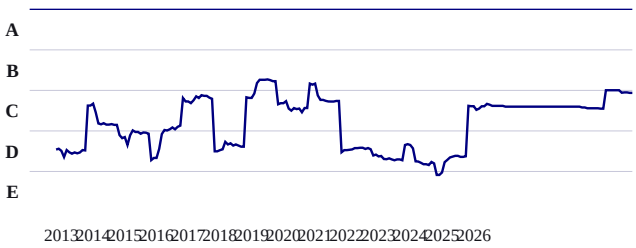
Profitability	B/C	percentile 39.2
Solvency	D	percentile 68.0
Growth and financing	B	percentile 32.6
Reliability	0.94 AUC	filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year	Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets	total assets $28.0B
Standard universe	inside	revenue above $1M and assets above $10M
Warnings	none triggered	not computable: distress
Inputs computable	12 of 13	
Graded from	filings received through Nov 10, 2026	11 days before the rescan; latest periodic filing 10-K received Nov 10, 2026
Last close	$1,121.80	2026-11-20; market equity $61.2B; 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 Nov 12, 2025

TD Group, through its wholly-owned subsidiary, TransDigm Inc., is a leading global designer, producer and supplier of highly engineered aircraft components that are critical to the safe and effective operation of nearly all commercial and military aircraft worldwide. Our products are represented in nearly every commercial and military aircraft in service today. Our business is well diversified due to the broad range of products we offer to our customers. We estimate that approximately 90% of our net sales for fiscal year 2025 were generated by proprietary products. Most of our products generate significant aftermarket revenue.

The thirteen inputs

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

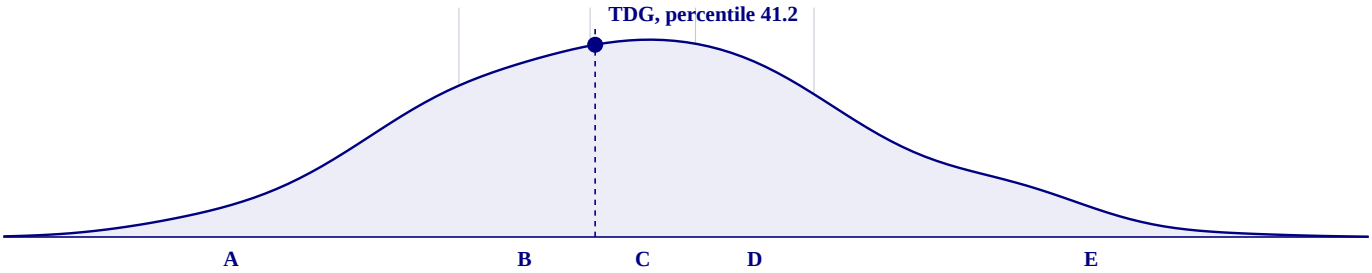
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 39.2						
Gross profitability	22.3%	22.3%		45.5	267	2026-09-30
Return on invested capital	19.2%	9.9%		17.5	98	2026-09-30
Accruals ratio	(0.3%)	(3.7%)		79.4	288	2026-09-30

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Gross margin stability, five years	1.0 pts	2.1 pts	14.5	222	2026-09-30
Solvency, sleeve percentile 68.0					
Altman Z double-prime	1.06	3.74	74.8	223	2026-09-30
Net debt to EBITDA	5.99x	1.75x	96.6	118	2026-09-30
Interest coverage	not computable	5.13x			
one or more required annual facts are missing					
Current ratio	2.90x	2.30x	32.6	302	2026-09-30
Growth and financing, sleeve percentile 32.6					
Revenue growth, three-year compound	17.0%	2.3%	10.4	261	2026-09-30
Free cash flow growth, three-year compound	15.7%	13.5%	48.6	139	2026-09-30
Reinvestment rate	0.4%	24.5%	66.9	140	2026-09-30
Asset growth, three years	11.9%	4.2%	22.7	265	2026-09-30
Net share issuance, one year	(3.1%)	(0.04%)	14.6	240	2026-10-30

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
97	Advanced Drainage Systems, Inc. (WMS)	39.2	B/C	
98	Gibraltar Industries, Inc. (ROCK)	39.6	B/C	fortress balance sheet
99	Virco MFG Corporation (VIRC)	40.0	B/C	fortress balance sheet
100	Bloom Energy Corp. (BE)	40.4	B/C	
101	OIL States International, Inc. (OIS)	40.8	B/C	fortress balance sheet
102	TransDigm Group Inc. (TDG)	41.2	B/C	
103	Friedman Industries Inc. (FRD)	41.6	B/C	
104	Littelfuse Inc. (LFUS)	42.0	B/C	late filer
105	Belden Inc. (BDC)	42.4	B/C	
106	Woodward, Inc. (WWD)	42.9	B/C	
107	Packaging Corp. OF America (PKG)	43.3	C	dilution

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	(17.3%)	10.0%	22
Distance from 52-week high	(22.7%)	(32.1%)	70
EBIT to enterprise value	5.2%	4.5%	59
Free cash flow yield	3.1%	3.8%	43
Book value to price	(0.16)	0.39	3
Sales to price	0.17	0.60	8
Composite equity issuance, five years	(26.3%)	(9.5%)	14
Relative strength against the sector, log excess return	(0.27)	0.01	22
Twelve-month failure probability, CHS model	not computable	0.04%	

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Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 6 of 9, period end 2026-09-30	
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	fail
Current ratio improved	fail
No new shares issued	pass
Gross margin improved	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$2.3B
Operating cash flow, four quarters	$2.2B
Months of runway	not finite
Days since last periodic filing	11 (10-K received Nov 10, 2026)
Median daily dollar volume, 63 sessions	$429.3M

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	$6.3B	2026-09-30	2026-11-10	10-K	26-000077
2	assets	us-gaap:Assets	$28.0B	2026-09-30	2026-11-10	10-K	26-000077
3	operating income	us-gaap:OperatingIncomeLoss	$4.8B	2026-09-30	2026-11-10	10-K	26-000077
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$2.8B	2026-09-30	2026-11-10	10-K	26-000077
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$656.0M	2026-09-30	2026-11-10	10-K	26-000077
6	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$33.7B	2026-09-30	2026-11-10	10-K	26-000077
7	book equity	us-gaap:StockholdersEquity	-$10.0B	2026-09-30	2026-11-10	10-K	26-000077
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$2.3B	2026-09-30	2026-11-10	10-K	26-000077
9	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$29.2B	2025-09-30	2026-11-10	10-K	26-000077
10	book equity	us-gaap:StockholdersEquity	-$9.7B	2025-09-30	2026-11-10	10-K	26-000077
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$2.8B	2025-09-30	2026-11-10	10-K	26-000077
12	net income	us-gaap:NetIncomeLoss	$2.1B	2026-09-30	2026-11-10	10-K	26-000077
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$2.2B	2026-09-30	2026-11-10	10-K	26-000077
14	assets	us-gaap:Assets	$22.9B	2025-09-30	2026-11-10	10-K	26-000077
15	revenue	us-gaap:Revenues	$10.6B	2026-09-30	2026-11-10	10-K	26-000077
16	gross profit	us-gaap:GrossProfit	$5.3B	2025-09-30	2026-11-10	10-K	26-000077
17	revenue	us-gaap:Revenues	$8.8B	2025-09-30	2026-11-10	10-K	26-000077
18	gross profit	us-gaap:GrossProfit	$4.7B	2024-09-30	2026-11-10	10-K	26-000077
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$7.9B	2024-09-30	2024-11-07	10-K	24-000083
20	gross profit	us-gaap:GrossProfit	$3.8B	2023-09-30	2025-11-12	10-K	25-000081
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$6.6B	2023-09-30	2024-11-07	10-K	24-000083
22	gross profit	us-gaap:GrossProfit	$3.1B	2022-09-30	2024-11-07	10-K	24-000083
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$5.4B	2022-09-30	2024-11-07	10-K	24-000083
24	current assets	us-gaap:AssetsCurrent	$7.7B	2026-09-30	2026-11-10	10-K	26-000077
25	current liabilities	us-gaap:LiabilitiesCurrent	$2.6B	2026-09-30	2026-11-10	10-K	26-000077
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$8.5B	2026-09-30	2026-11-10	10-K	26-000077
27	liabilities	us-gaap:Liabilities	$37.9B	2026-09-30	2026-11-10	10-K	26-000077
28	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$445.0M	2026-09-30	2026-11-10	10-K	26-000077
29	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$274.0M	2026-09-30	2026-11-10	10-K	26-000077
30	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$2.0B	2025-09-30	2026-11-10	10-K	26-000077
31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$222.0M	2025-09-30	2026-11-10	10-K	26-000077

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32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$2.0B	2024-09-30	2026-11-10	10-K	26-000077
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$165.0M	2024-09-30	2026-11-10	10-K	26-000077
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$1.4B	2023-09-30	2025-11-12	10-K	25-000081
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$139.0M	2023-09-30	2025-11-12	10-K	25-000081
36	current assets	us-gaap:AssetsCurrent	$7.0B	2025-09-30	2026-11-10	10-K	26-000077
37	current liabilities	us-gaap:LiabilitiesCurrent	$2.2B	2025-09-30	2026-11-10	10-K	26-000077
38	assets	us-gaap:Assets	$25.6B	2024-09-30	2026-11-10	10-K	26-000077
39	assets	us-gaap:Assets	$20.0B	2023-09-30	2025-11-12	10-K	25-000081
40	shares outstanding	dei:EntityCommonStockSharesOutstanding	54,589,836	2026-10-30	2026-11-10	10-K	26-000077
41	shares outstanding	dei:EntityCommonStockSharesOutstanding	56,318,584	2025-10-31	2025-11-12	10-K	25-000081

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