Fortune Brands Innovations, Inc. FBIN

NYSE; other; SIC 2430, Millwood, Veneer, Plywood, & Structural Wood Members; CIK 0001519751

C

middle fifth of 315 graded peers in other

rank 146 of 315; percentile 46.2; sampling error 2.7 points; lower is stronger

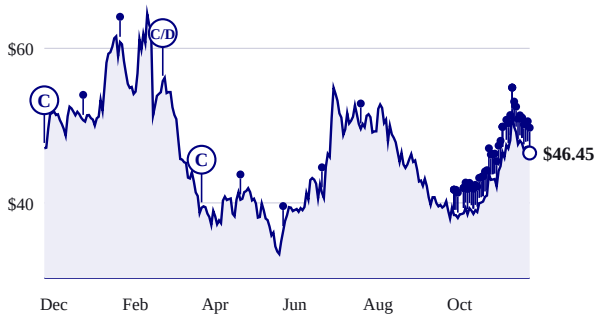
A B C D E

C, the tortoise



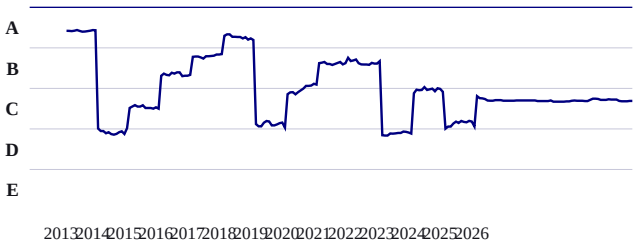
Scoreboard	
Profitability	C percentile 54.8
Solvency	B/C percentile 40.2
Growth and financing	C percentile 46.7
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $6.5B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress
Inputs computable	13 of 13
Graded from	filings received through Feb 23, 2026 272 days before the rescan; latest periodic filing 10-Q received Nov 4, 2026
Last close	$46.46 2026-11-20; market equity $5.5B; 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 23, 2026

This Annual Report on Form 10-K contains certain "forward-looking statements" made pursuant to the safe harbor provisions of Section 27A of the Securities Act of 1933, as amended (the "Securities Act"), and Section 21E of the Securities Exchange Act of 1934, as amended (the "Exchange Act").

The thirteen inputs

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

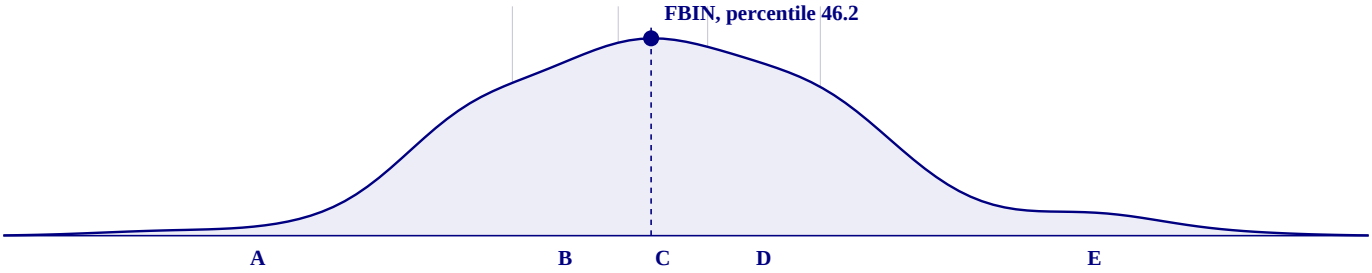
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 54.8						
Gross profitability	30.5%	26.7%		41.3	265	2025-12-27
Return on invested capital	8.1%	10.0%		61.0	147	2025-12-27
Accruals ratio	(2.7%)	(5.7%)		73.3	458	2025-12-27
Gross margin stability, five years	1.8 pts	2.2 pts		43.8	195	2025-12-27
Solvency, sleeve percentile 40.2						

Not investment advice. Informational and educational only. Data from SEC EDGAR, may contain errors, is not warranted. The grade ranks reported financial condition and is not a return forecast.

Altman Z double-prime	3.61	2.06	26.7	357	2025-12-27
Net debt to EBITDA	3.59x	2.37x	66.3	173	2025-12-27
Interest coverage	4.48x	2.93x	36.4	78	2025-12-27
Current ratio	1.84x	1.33x	31.7	462	2025-12-27
Growth and financing, sleeve percentile 46.7					
Revenue growth, three-year compound	(1.9%)	4.9%	73.1	376	2025-12-27
Free cash flow growth, three-year compound	4.6%	8.7%	55.7	213	2025-12-27
Reinvestment rate	128.8%	13.3%	11.8	187	2025-12-27
Asset growth, three years	2.1%	4.1%	60.6	402	2025-12-27
Net share issuance, one year	(2.1%)	(0.5%)	32.6	354	2026-02-06

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
141	Onterris, Inc. (ONT)	44.6	C	
142	Walt Disney Co. (DIS)	44.9	C	
143	Freeport-Mcmoran Inc. (FCX)	45.2	C	
144	Ebay Inc. (EBAY)	45.5	C	
145	Everforth Inc. (EFOR)	45.9	C	
146	Fortune Brands Innovations, Inc. (FBIN)	46.2	C	
147	Granite Construction Inc. (GVA)	46.5	C	
148	Smart Sand, Inc. (SND)	46.8	C	fortress balance sheet
149	Resources Connection, Inc. (RGP)	47.1	C	
150	United Parks & Resorts Inc. (PRKS)	47.5	C	late filer
151	XPO, Inc. (XPO)	47.8	C	

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	(23.3%)	0.4%	30
Distance from 52-week high	(27.9%)	(28.8%)	51
EBIT to enterprise value	6.6%	4.6%	69
Free cash flow yield	6.7%	4.1%	67
Book value to price	0.42	0.39	51
Sales to price	0.81	0.75	54
Composite equity issuance, five years	(25.3%)	(9.5%)	21
Relative strength against the sector, log excess return	(0.39)	(0.12)	30
Twelve-month failure probability, CHS model	not computable	0.04%	

Not investment advice. Informational and educational only. Data from SEC EDGAR, may contain errors, is not warranted. The grade ranks reported financial condition and is not a return forecast.

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 5 of 9, period end 2025-12-27	
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	pass
Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$230.9M
Operating cash flow, four quarters	$638.8M
Months of runway	not finite
Days since last periodic filing	18 (10-Q received Nov 4, 2026)
Median daily dollar volume, 63 sessions	$89.4M

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	revenue	us-gaap:Revenues	$4.5B	2025-12-27	2026-02-23	10-K	26-063960
2	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$2.5B	2025-12-27	2026-02-23	10-K	26-063960
3	assets	us-gaap:Assets	$6.5B	2025-12-27	2026-02-23	10-K	26-063960
4	operating income	us-gaap:OperatingIncomeLoss	$516.1M	2025-12-27	2026-02-23	10-K	26-063960
5	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$405.0M	2025-12-27	2026-02-23	10-K	26-063960
6	income tax	us-gaap:IncomeTaxExpenseBenefit	$106.2M	2025-12-27	2026-02-23	10-K	26-063960
7	total debt	us-gaap:LongTermDebt	$2.5B	2025-12-27	2026-02-23	10-K	26-063960
8	book equity	us-gaap:StockholdersEquityIncludingPortionAttributableT...	$2.4B	2025-12-27	2026-02-23	10-K	26-063960
9	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$264.0M	2025-12-27	2026-02-23	10-K	26-063960
10	total debt	us-gaap:LongTermDebt	$2.7B	2024-12-28	2026-02-23	10-K	26-063960
11	book equity	us-gaap:StockholdersEquityIncludingPortionAttributableT...	$2.4B	2024-12-28	2026-02-23	10-K	26-063960
12	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$381.1M	2024-12-28	2026-02-23	10-K	26-063960
13	net income	us-gaap:ProfitLoss	$298.8M	2025-12-27	2026-02-23	10-K	26-063960
14	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$478.6M	2025-12-27	2026-02-23	10-K	26-063960
15	assets	us-gaap:Assets	$6.6B	2024-12-28	2026-02-23	10-K	26-063960
16	revenue	us-gaap:Revenues	$4.6B	2024-12-28	2026-02-23	10-K	26-063960
17	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$2.5B	2024-12-28	2026-02-23	10-K	26-063960
18	revenue	us-gaap:Revenues	$4.6B	2023-12-30	2026-02-23	10-K	26-063960
19	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$2.7B	2023-12-30	2026-02-23	10-K	26-063960
20	revenue	us-gaap:Revenues	$4.7B	2022-12-31	2025-02-25	10-K	25-026763
21	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$2.8B	2022-12-31	2025-02-25	10-K	25-026763
22	revenue	us-gaap:Revenues	$4.8B	2021-12-31	2024-02-27	10-K	24-021148
23	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$2.8B	2021-12-31	2024-02-27	10-K	24-021148
24	current assets	us-gaap:AssetsCurrent	$2.0B	2025-12-27	2026-02-23	10-K	26-063960
25	current liabilities	us-gaap:LiabilitiesCurrent	$1.1B	2025-12-27	2026-02-23	10-K	26-063960
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$3.1B	2025-12-27	2026-02-23	10-K	26-063960
27	liabilities	us-gaap:Liabilities	$4.1B	2025-12-27	2026-02-23	10-K	26-063960
28	depreciation amortization	us-gaap:Depreciation	$118.9M	2025-12-27	2026-02-23	10-K	26-063960
29	interest expense	us-gaap:InterestExpense	$115.2M	2025-12-27	2026-02-23	10-K	26-063960
30	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$111.8M	2025-12-27	2026-02-23	10-K	26-063960
31	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$667.8M	2024-12-28	2026-02-23	10-K	26-063960

Not investment advice. Informational and educational only. Data from SEC EDGAR, may contain errors, is not warranted. The grade ranks reported financial condition and is not a return forecast.

32	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$193.3M	2024-12-28	2026-02-23	10-K	26-063960
33	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$1.1B	2023-12-30	2026-02-23	10-K	26-063960
34	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$256.5M	2023-12-30	2026-02-23	10-K	26-063960
35	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$566.3M	2022-12-31	2025-02-25	10-K	25-026763
36	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$246.1M	2022-12-31	2025-02-25	10-K	25-026763
37	current assets	us-gaap:AssetsCurrent	$2.0B	2024-12-28	2026-02-23	10-K	26-063960
38	current liabilities	us-gaap:LiabilitiesCurrent	$1.6B	2024-12-28	2026-02-23	10-K	26-063960
39	assets	us-gaap:Assets	$6.6B	2023-12-30	2026-02-23	10-K	26-063960
40	assets	us-gaap:Assets	$6.1B	2022-12-31	2025-02-25	10-K	25-026763
41	shares outstanding	dei:EntityCommonStockSharesOutstanding	119,988,377	2026-02-06	2026-02-23	10-K	26-063960
42	shares outstanding	dei:EntityCommonStockSharesOutstanding	122,576,651	2025-02-07	2025-02-25	10-K	25-026763

Not investment advice. Informational and educational only. Data from SEC EDGAR, may contain errors, is not warranted. The grade ranks reported financial condition and is not a return forecast.