Lear Corp.

LEA

NYSE; consumer durables; SIC 3714, Motor Vehicle Parts & Accessories; CIK 0000842162

B/C

on the B/C boundary of 428 graded peers in the pooled cons...

rank 161 of 428; percentile 37.9; sampling error 2.4 points; lower is stronger



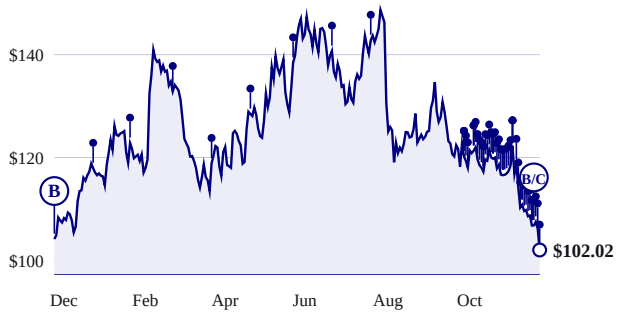
B/C, the elk



Scoreboard

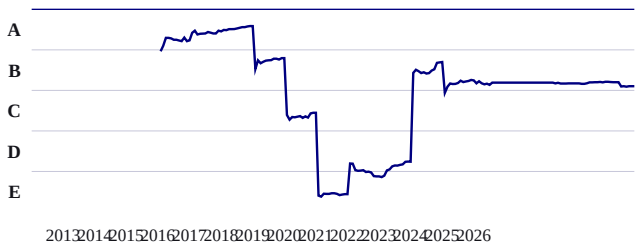
Profitability	C	percentile 50.2
Solvency	C	percentile 48.2
Growth and financing	B	percentile 35.3
Reliability	0.94 AUC	filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year	Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets	total assets $14.8B
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 13, 2026	282 days before the rescan; latest periodic filing 10-Q received Oct 30, 2026
Last close	$101.71	2026-11-20; market equity $4.9B; 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 13, 2026

In this Annual Report on Form 10-K (this "Report"), when we use the terms the "Company," "Lear," "we," "us" and "our," unless otherwise indicated or the context otherwise requires, we are referring to Lear Corporation and its consolidated subsidiaries. A substantial portion of the Company's operations are conducted through subsidiaries controlled by Lear Corporation. The Company is also a party to various joint venture arrangements. Certain disclosures included in this Report constitute forward-looking statements that are subject to risks and uncertainties. See

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 50.2						
Gross profitability	10.1%	34.9%		89.7	438	2025-12-31
Return on invested capital	9.2%	9.2%		49.0	146	2025-12-31
Accruals ratio	(4.5%)	(5.1%)		58.9	485	2025-12-31

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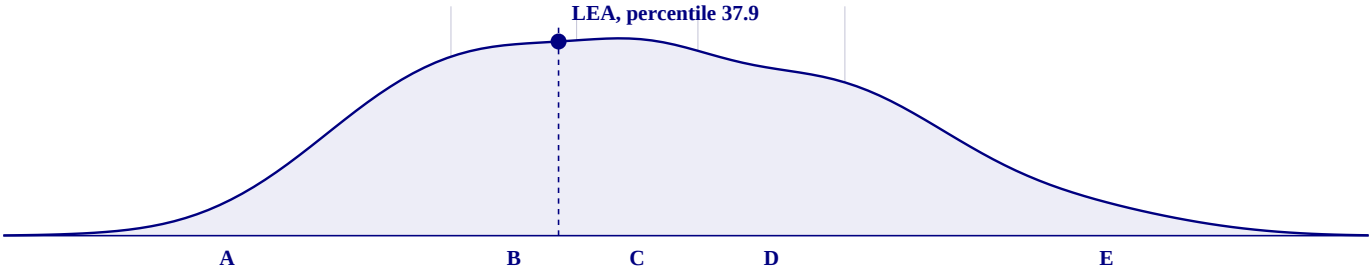
Gross margin stability, five years	0.3 pts	1.7 pts	3.2	377	2025-12-31
Solvency, sleeve percentile 48.2					
Altman Z double-prime	not computable	2.14			
one or more required annual facts are missing					
Net debt to EBITDA	1.22x	2.11x	38.7	169	2025-12-31
Interest coverage	not computable	3.21x			
latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31					
Current ratio	1.35x	1.56x	57.6	499	2025-12-31
Growth and financing, sleeve percentile 35.3					
Revenue growth, three-year compound	3.6%	1.4%	38.2	446	2025-12-31
Free cash flow growth, three-year compound	11.2%	7.3%	42.7	235	2025-12-31
Reinvestment rate	36.6%	18.0%	40.6	250	2025-12-31
Asset growth, three years	2.6%	2.0%	44.1	448	2025-12-31
Net share issuance, one year	(5.4%)	(0.2%)	10.9	377	2026-02-10

Among 428 peers

consumer durables; 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
156	Mohawk Industries Inc. (MHK)	36.8	B/C	
157	Giftify, Inc. (GIFT)	37.0	B/C	
158	Dollar General Corp. (DG)	37.4	B/C	
159	PVH Corp. (PVH)	37.6	B/C	
160	Avnet Inc. (AVT)	37.8	B/C	short runway
161	Lear Corp. (LEA)	37.9	B/C	
162	VirTra, Inc. (VTSI)	38.2	B/C	fortress balance sheet
163	Zumiez Inc. (ZUMZ)	38.2	B/C	fortress balance sheet
164	Coca-Cola Consolidated, Inc. (COKE)	38.5	B/C	
165	YUM Brands Inc. (YUM)	38.7	B/C	
166	Sysco Corp. (SYY)	39.1	B/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	15.6%	(1.3%)	67
Distance from 52-week high	(31.4%)	(26.2%)	42
EBIT to enterprise value	12.7%	5.1%	92
Free cash flow yield	10.7%	4.6%	78
Book value to price	1.02	0.49	77
Sales to price	4.73	1.48	83
Composite equity issuance, five years	(35.0%)	(16.9%)	16
Relative strength against the sector, log excess return	0.23	0.03	71
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 7 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	pass
Current ratio improved	pass
No new shares issued	pass
Gross margin improved	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$889.4M
Operating cash flow, four quarters	$1.4B
Months of runway	not finite
Days since last periodic filing	23 (10-Q received Oct 30, 2026)
Median daily dollar volume, 63 sessions	$63.8M

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	$1.5B	2025-12-31	2026-02-13	10-K	26-000011
2	assets	us-gaap:Assets	$14.8B	2025-12-31	2026-02-13	10-K	26-000011
3	operating income	us-gaap:OperatingIncomeLoss	$777.3M	2025-12-31	2026-02-13	10-K	26-000011
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$625.1M	2025-12-31	2026-02-13	10-K	26-000011
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$150.0M	2025-12-31	2026-02-13	10-K	26-000011
6	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$2.7B	2025-12-31	2026-02-13	10-K	26-000011
7	book equity	us-gaap:StockholdersEquity	$5.0B	2025-12-31	2026-02-13	10-K	26-000011
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$1.0B	2025-12-31	2026-02-13	10-K	26-000011
9	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$2.7B	2024-12-31	2026-02-13	10-K	26-000011
10	book equity	us-gaap:StockholdersEquity	$4.5B	2024-12-31	2026-02-13	10-K	26-000011
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$1.1B	2024-12-31	2026-02-13	10-K	26-000011
12	net income	us-gaap:NetIncomeLoss	$436.8M	2025-12-31	2026-02-13	10-K	26-000011
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$1.1B	2025-12-31	2026-02-13	10-K	26-000011
14	assets	us-gaap:Assets	$14.0B	2024-12-31	2026-02-13	10-K	26-000011
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$23.3B	2025-12-31	2026-02-13	10-K	26-000011
16	gross profit	us-gaap:GrossProfit	$1.6B	2024-12-31	2026-02-13	10-K	26-000011
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$23.3B	2024-12-31	2026-02-13	10-K	26-000011
18	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$23.5B	2023-12-31	2026-02-13	10-K	26-000011
19	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$21.8B	2023-12-31	2026-02-13	10-K	26-000011
20	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$20.9B	2022-12-31	2025-02-14	10-K	25-000010
21	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$19.5B	2022-12-31	2025-02-14	10-K	25-000010
22	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$19.3B	2021-12-31	2024-02-08	10-K	24-000008
23	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$17.9B	2021-12-31	2024-02-08	10-K	24-000008
24	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$604.1M	2025-12-31	2026-02-13	10-K	26-000011
25	operating income	us-gaap:OperatingIncomeLoss	$933.2M	2023-12-31	2026-02-13	10-K	26-000011
26	interest expense	us-gaap:InterestExpense	$101.1M	2023-12-31	2024-02-08	10-K	24-000008
27	current assets	us-gaap:AssetsCurrent	$7.7B	2025-12-31	2026-02-13	10-K	26-000011
28	current liabilities	us-gaap:LiabilitiesCurrent	$5.7B	2025-12-31	2026-02-13	10-K	26-000011
29	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$561.6M	2025-12-31	2026-02-13	10-K	26-000011
30	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$1.1B	2024-12-31	2026-02-13	10-K	26-000011
31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$558.7M	2024-12-31	2026-02-13	10-K	26-000011

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32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$1.2B	2023-12-31	2026-02-13	10-K	26-000011
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$626.5M	2023-12-31	2026-02-13	10-K	26-000011
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$1.0B	2022-12-31	2025-02-14	10-K	25-000010
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$638.2M	2022-12-31	2025-02-14	10-K	25-000010
36	current assets	us-gaap:AssetsCurrent	$7.2B	2024-12-31	2026-02-13	10-K	26-000011
37	current liabilities	us-gaap:LiabilitiesCurrent	$5.4B	2024-12-31	2026-02-13	10-K	26-000011
38	assets	us-gaap:Assets	$14.7B	2023-12-31	2025-02-14	10-K	25-000010
39	assets	us-gaap:Assets	$13.8B	2022-12-31	2024-02-08	10-K	24-000008
40	shares outstanding	dei:EntityCommonStockSharesOutstanding	50,727,454	2026-02-10	2026-02-13	10-K	26-000011
41	shares outstanding	dei:EntityCommonStockSharesOutstanding	53,637,383	2025-02-12	2025-02-14	10-K	25-000010

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