Dana Inc.

DAN

NYSE; consumer durables; SIC 3714, Motor Vehicle Parts & Accessories; CIK 0000026780

D

fourth fifth of 428 graded peers in the pooled consumer group

rank 316 of 428; percentile 74.2; sampling error 2.4 points; lower is stronger

A B C D E

D, the sloth



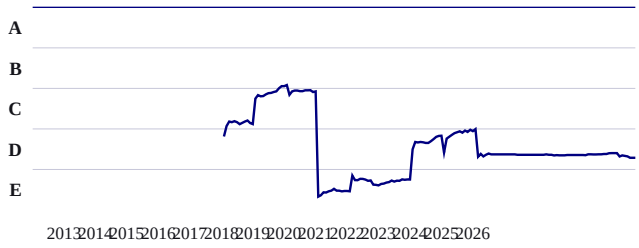
Scoreboard	
Profitability	D percentile 64.3
Solvency	D percentile 70.2
Growth and financing	C percentile 44.3
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $7.8B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	late filer not computable: distress
Inputs computable	11 of 13
Graded from	filings received through Feb 27, 2026 269 days before the rescan; latest periodic filing 10-Q received Nov 5, 2026
Last close	$22.07 2026-11-20; market equity $2.2B; 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 Feb 27, 2026

Dana Incorporated (Dana), with history dating back to 1904, is headquartered in Maumee, Ohio. We are a world leader in providing power-conveyance and energy-management solutions for on-highway vehicles. The company's portfolio improves the efficiency, performance, and sustainability of light and commercial vehicles. From axles, driveshafts, transmissions, sealing and thermal products to electrification products including motors, inverters, controllers, e-sealing, e-thermal and digital solutions, we enable the propulsion of internal combustion engine (ICE), hybrid and electric powered vehicles by supplying nearly every major on-highway vehicle manufacturer in the world.

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 64.3						
Gross profitability	7.7%	34.9%		92.2	438	2025-12-31
Return on invested capital	not computable	9.2%				

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pretax income must exceed the validity floor and imply a 0%-100% tax rate						
Accruals ratio	(5.6%)	(5.1%)		49.2	485	2025-12-31
Gross margin stability, five years	1.8 pts	1.7 pts		51.6	377	2025-12-31
Solvency, sleeve percentile 70.2						
Altman Z double-prime	0.82	2.14		63.2	373	2025-12-31
Net debt to EBITDA	4.33x	2.11x		81.0	169	2025-12-31
Interest coverage	0.77x	3.21x		69.5	106	2025-12-31
Current ratio	1.17x	1.56x		67.3	499	2025-12-31
Growth and financing, sleeve percentile 44.3						
Revenue growth, three-year compound	(9.6%)	1.4%		86.7	446	2025-12-31
Free cash flow growth, three-year compound	12.6%	7.3%		40.6	235	2025-12-31
Reinvestment rate	not computable	18.0%				
pretax income must exceed the validity floor and imply a 0%-100% tax rate						
Asset growth, three years	1.6%	2.0%		49.2	448	2025-12-31
Net share issuance, one year	(25.1%)	(0.2%)		0.5	377	2026-02-06

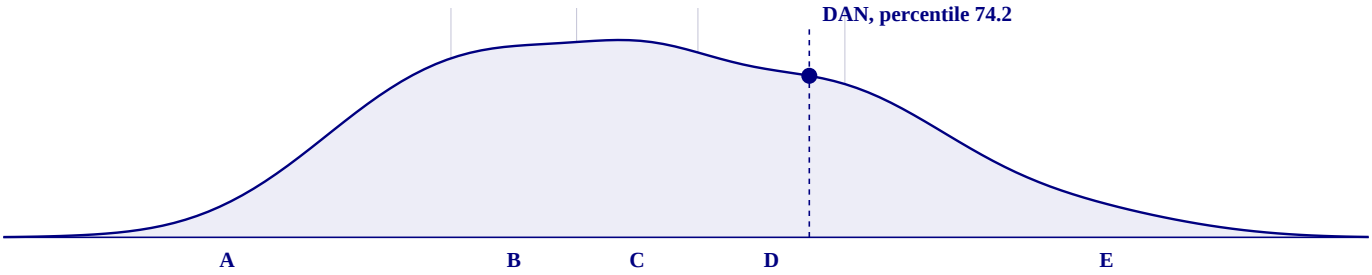
Warnings

1 of 7 checks triggered; none of them enters the letter

Check	Measured
Late filer	found 1 NT 10-K/Q filings in the last eight quarters

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
311	Team Inc. (TISI)	72.7	D	
312	Target Corp. (TGT)	73.1	D	
313	General Mills Inc. (GIS)	73.5	D	
314	Ingram Micro Holding Corp. (INGM)	73.5	D	
315	Lands' END, Inc. (LE)	73.9	D	short runway
316	Dana Inc. (DAN)	74.2	D	late filer
317	J M Smucker Co. (SJM)	74.4	D	
318	Sherwin Williams Co. (SHW)	74.4	D	
319	Winnebago Industries Inc. (WGO)	74.5	D	
320	Rivian Automotive, Inc. DE (RIVN)	74.7	D	fortress balance sheet
321	El Pollo Loco Holdings, Inc. (LOCO)	74.8	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	36.7%	(1.3%)	80
Distance from 52-week high	(43.3%)	(26.2%)	28
EBIT to enterprise value	5.2%	5.1%	51

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Free cash flow yield	13.8%	4.6%	86
Book value to price	0.80	0.49	67
Sales to price	3.48	1.48	75
Composite equity issuance, five years	(53.9%)	(16.9%)	5
Relative strength against the sector, log excess return	0.40	0.03	83
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	fail
Current ratio improved	fail
No new shares issued	pass
Gross margin improved	pass
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$321.0M
Operating cash flow, four quarters	$422.0M
Months of runway	not finite
Days since last periodic filing	18 (10-Q received Nov 5, 2026)
Median daily dollar volume, 63 sessions	$39.2M

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:RevenueFromContractWithCustomerExcludingA...	$7.5B	2025-12-31	2026-02-27	10-K	26-006076
2	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$6.9B	2025-12-31	2026-02-27	10-K	26-006076
3	assets	us-gaap:Assets	$7.8B	2025-12-31	2026-02-27	10-K	26-006076
4	operating income	us-gaap:OperatingIncomeLoss	$139.0M	2025-12-31	2026-02-27	10-K	26-006076
5	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$32.0M	2025-12-31	2026-02-27	10-K	26-006076
6	income tax	us-gaap:IncomeTaxExpenseBenefit	$53.0M	2025-12-31	2026-02-27	10-K	26-006076
7	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$2.6B	2025-12-31	2026-02-27	10-K	26-006076
8	book equity	us-gaap:StockholdersEquity	$840.0M	2025-12-31	2026-02-27	10-K	26-006076
9	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$469.0M	2025-12-31	2026-02-27	10-K	26-006076
10	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$2.4B	2024-12-31	2026-02-27	10-K	26-006076
11	book equity	us-gaap:StockholdersEquity	$1.3B	2024-12-31	2026-02-27	10-K	26-006076
12	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$494.0M	2024-12-31	2026-02-27	10-K	26-006076
13	net income	us-gaap:NetIncomeLoss	$85.0M	2025-12-31	2026-02-27	10-K	26-006076
14	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$512.0M	2025-12-31	2026-02-27	10-K	26-006076
15	assets	us-gaap:Assets	$7.5B	2024-12-31	2026-02-27	10-K	26-006076
16	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$7.7B	2024-12-31	2026-02-27	10-K	26-006076
17	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$7.4B	2024-12-31	2026-02-27	10-K	26-006076
18	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$7.6B	2023-12-31	2026-02-27	10-K	26-006076
19	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$7.2B	2023-12-31	2026-02-27	10-K	26-006076
20	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$10.2B	2022-12-31	2025-02-20	10-K	25-004554
21	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$9.4B	2022-12-31	2025-02-20	10-K	25-004554
22	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$8.9B	2021-12-31	2024-02-20	10-K	24-004751
23	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$8.1B	2021-12-31	2024-02-20	10-K	24-004751
24	current assets	us-gaap:AssetsCurrent	$3.9B	2025-12-31	2026-02-27	10-K	26-006076

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25	current liabilities	us-gaap:LiabilitiesCurrent	$3.3B	2025-12-31	2026-02-27	10-K	26-006076
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$235.0M	2025-12-31	2026-02-27	10-K	26-006076
27	liabilities	us-gaap:Liabilities	$6.9B	2025-12-31	2026-02-27	10-K	26-006076
28	depreciation amortization	us-gaap:Depreciation	$345.0M	2025-12-31	2026-02-27	10-K	26-006076
29	interest expense	us-gaap:InterestExpense	$181.0M	2025-12-31	2026-02-27	10-K	26-006076
30	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$214.0M	2025-12-31	2026-02-27	10-K	26-006076
31	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$450.0M	2024-12-31	2026-02-27	10-K	26-006076
32	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$312.0M	2024-12-31	2026-02-27	10-K	26-006076
33	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$476.0M	2023-12-31	2026-02-27	10-K	26-006076
34	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$427.0M	2023-12-31	2026-02-27	10-K	26-006076
35	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$649.0M	2022-12-31	2025-02-20	10-K	25-004554
36	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$440.0M	2022-12-31	2025-02-20	10-K	25-004554
37	current assets	us-gaap:AssetsCurrent	$3.7B	2024-12-31	2026-02-27	10-K	26-006076
38	current liabilities	us-gaap:LiabilitiesCurrent	$2.6B	2024-12-31	2026-02-27	10-K	26-006076
39	assets	us-gaap:Assets	$7.9B	2023-12-31	2026-02-27	10-K	26-006076
40	assets	us-gaap:Assets	$7.4B	2022-12-31	2025-02-20	10-K	25-004554
41	shares outstanding	dei:EntityCommonStockSharesOutstanding	108,642,939	2026-02-06	2026-02-27	10-K	26-006076
42	shares outstanding	dei:EntityCommonStockSharesOutstanding	145,037,398	2025-02-03	2025-02-20	10-K	25-004554

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