Emerson Electric Co.

EMR

NYSE; manufacturing; SIC 3600, Electronic & Other Electrical Equipment (No Computer Equip); CIK 0000032604

D/E

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

rank 194 of 246; percentile 78.8; sampling error 3.0 points; lower is stronger

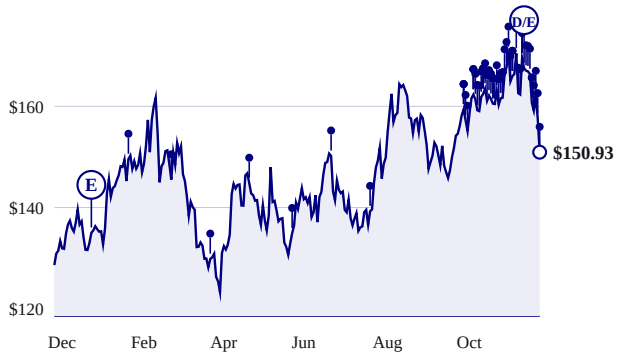


D/E, the sloth



Scoreboard	
Profitability	C percentile 52.0
Solvency	E percentile 94.7
Growth and financing	B percentile 31.0
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 $41.8B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: short runway, distress, fortress balance sheet
Inputs computable	8 of 13
Graded from	filings received through Nov 9, 2026 14 days before the rescan; latest periodic filing 10-K received Nov 9, 2026
Last close	$150.97 2026-11-20; market equity $82.8B; 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 10, 2025

Emerson Electric Co. ("Emerson", "we", "us", "our" or the "Company") is a global technology and software company that provides innovative solutions for customers in a wide range of end markets around the world. Through its leading automation portfolio, Emerson helps process, hybrid and discrete manufacturers optimize operations, protect personnel, reduce emissions and achieve their sustainability goals. Sales by geographic destination in 2025 were: the Americas, 51 percent; Asia, Middle East & Africa, 30 percent (China, 10 percent); and Europe, 19 percent. Portfolio management is an integral component of Emerson's growth and value creation strategy.

The thirteen inputs

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

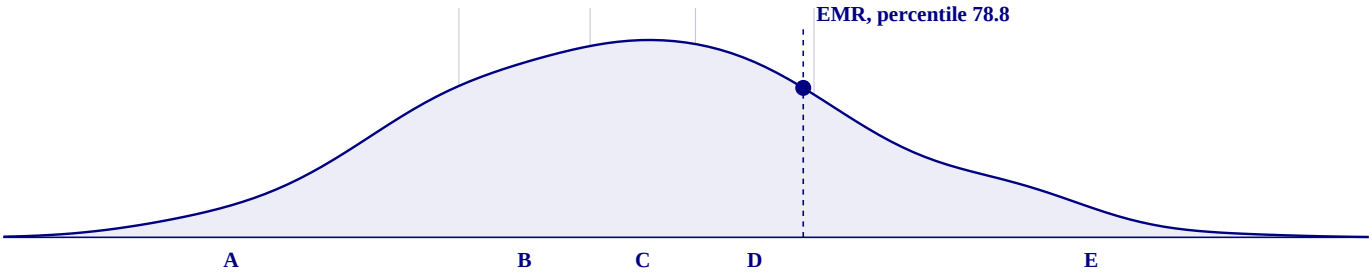
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 52.0						
Gross profitability	24.2%	22.3%		38.3	267	2026-09-30
Return on invested capital	not computable	9.9%				

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one or more required annual facts are missing					
Accruals ratio	(3.1%)	(3.7%)	55.7	288	2026-09-30
Gross margin stability, five years	2.8 pts	2.1 pts	62.0	222	2026-09-30
Solvency, sleeve percentile 94.7					
Altman Z double-prime	not computable	3.74			
one or more required annual facts are missing					
Net debt to EBITDA	not computable	1.75x			
one or more required annual facts are missing					
Interest coverage	not computable	5.13x			
one or more required annual facts are missing					
Current ratio	0.94x	2.30x	94.7	302	2026-09-30
Growth and financing, sleeve percentile 31.0					
Revenue growth, three-year compound	7.8%	2.3%	28.1	261	2026-09-30
Free cash flow growth, three-year compound	134.5%	13.5%	2.9	139	2026-09-30
Reinvestment rate	not computable	24.5%			
one or more required annual facts are missing					
Asset growth, three years	(0.7%)	4.2%	72.3	265	2026-09-30
Net share issuance, one year	(2.3%)	(0.04%)	20.5	240	2026-10-31

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
189	Crown Holdings, Inc. (CCK)	76.7	D	
190	Brunswick Corp. (BC)	77.1	D/E	
191	Avery Dennison Corp. (AVY)	77.6	D/E	
192	Eastman Kodak Co. (KODK)	78.0	D/E	fortress balance sheet
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	

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	12.9%	10.0%	54
Distance from 52-week high	(11.6%)	(32.1%)	88
EBIT to enterprise value	not computable	4.5%	
Free cash flow yield	4.3%	3.8%	55
Book value to price	0.25	0.39	29

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Sales to price	0.23	0.60	13
Composite equity issuance, five years	(18.4%)	(9.5%)	26
Relative strength against the sector, log excess return	0.04	0.01	54
Twelve-month failure probability, CHS model	not computable	0.04%	

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 9 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	pass
Current ratio improved	pass
No new shares issued	pass
Gross margin improved	pass
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	n/a
Operating cash flow, four quarters	n/a
Months of runway	not finite
Days since last periodic filing	14 (10-K received Nov 9, 2026)
Median daily dollar volume, 63 sessions	$398.7M

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	$10.1B	2026-09-30	2026-11-09	10-K	26-000054
2	assets	us-gaap:Assets	$41.8B	2026-09-30	2026-11-09	10-K	26-000054
3	net income	us-gaap:NetIncomeLoss	$2.7B	2026-09-30	2026-11-09	10-K	26-000054
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$4.0B	2026-09-30	2026-11-09	10-K	26-000054
5	assets	us-gaap:Assets	$42.0B	2025-09-30	2026-11-09	10-K	26-000054
6	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$19.0B	2026-09-30	2026-11-09	10-K	26-000054
7	gross profit	us-gaap:GrossProfit	$9.5B	2025-09-30	2026-11-09	10-K	26-000054
8	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$18.0B	2025-09-30	2026-11-09	10-K	26-000054
9	gross profit	us-gaap:GrossProfit	$8.9B	2024-09-30	2025-11-10	10-K	25-000087
10	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$17.5B	2024-09-30	2026-11-09	10-K	26-000054
11	gross profit	us-gaap:GrossProfit	$7.4B	2023-09-30	2024-11-12	10-K	24-000041
12	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$15.2B	2023-09-30	2025-11-10	10-K	25-000087
13	gross profit	us-gaap:GrossProfit	$6.3B	2022-09-30	2023-11-13	10-K	23-000044
14	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$13.8B	2022-09-30	2024-11-12	10-K	24-000041
15	current assets	us-gaap:AssetsCurrent	$9.5B	2026-09-30	2026-11-09	10-K	26-000054
16	current liabilities	us-gaap:LiabilitiesCurrent	$10.1B	2026-09-30	2026-11-09	10-K	26-000054
17	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$443.0M	2026-09-30	2026-11-09	10-K	26-000054
18	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$3.1B	2025-09-30	2026-11-09	10-K	26-000054
19	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$431.0M	2025-09-30	2026-11-09	10-K	26-000054
20	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$3.3B	2024-09-30	2026-11-09	10-K	26-000054
21	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$419.0M	2024-09-30	2026-11-09	10-K	26-000054
22	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$637.0M	2023-09-30	2025-11-10	10-K	25-000087
23	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$363.0M	2023-09-30	2025-11-10	10-K	25-000087
24	assets	us-gaap:Assets	$44.2B	2024-09-30	2026-11-09	10-K	26-000054
25	assets	us-gaap:Assets	$42.7B	2023-09-30	2025-11-10	10-K	25-000087
26	shares outstanding	dei:EntityCommonStockSharesOutstanding	548,600,000	2026-10-31	2026-11-09	10-K	26-000054

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27	shares outstanding	dei:EntityCommonStockSharesOutstanding	561,800,000	2025-10-31	2025-11-10	10-K	25-000087