Entegris Inc.

ENTG

Nasdaq; manufacturing; SIC 3089, Plastics Products, NEC; CIK 0001101302

D

fourth fifth of 246 graded peers in manufacturing

rank 186 of 246; percentile 75.5; sampling error 3.0 points; lower is stronger

A B C D E

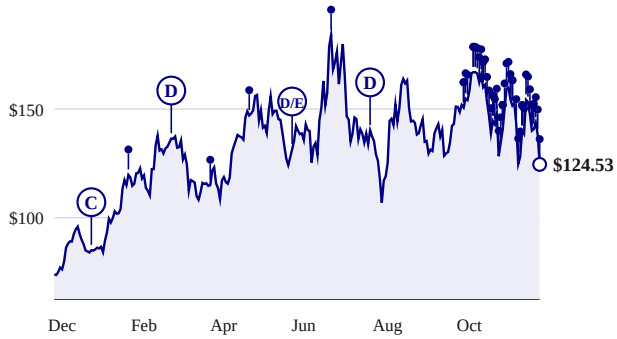
D, the sloth



Scoreboard

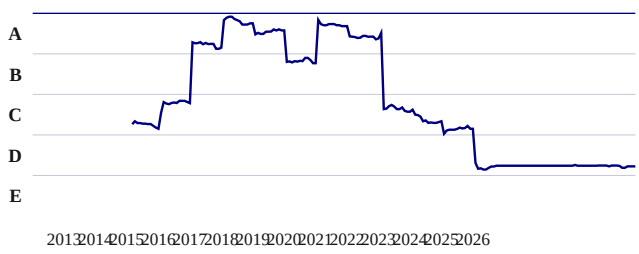
Profitability	C percentile 51.2
Solvency	C percentile 56.8
Growth and financing	D percentile 65.3
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $8.4B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress
Inputs computable	10 of 13
Graded from	filings received through Feb 11, 2026 285 days before the rescan; latest periodic filing 10-Q received Oct 29, 2026
Last close	$124.53 2026-11-20; market equity $19.0B; 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 11, 2026

Entegris, Inc. ("Entegris", "the Company", "us", "we", or "our") is a leading supplier of critical advanced materials and process solutions for the semiconductor and other high-technology industries. We leverage our unique breadth of capabilities to provide customers with innovative, science-based solutions to their toughest technology challenges, helping improve productivity and product performance in the most advanced manufacturing environments. Semiconductors, or integrated circuits, are key components in electronic devices that continue to transform how we live, communicate and work.

The thirteen inputs

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

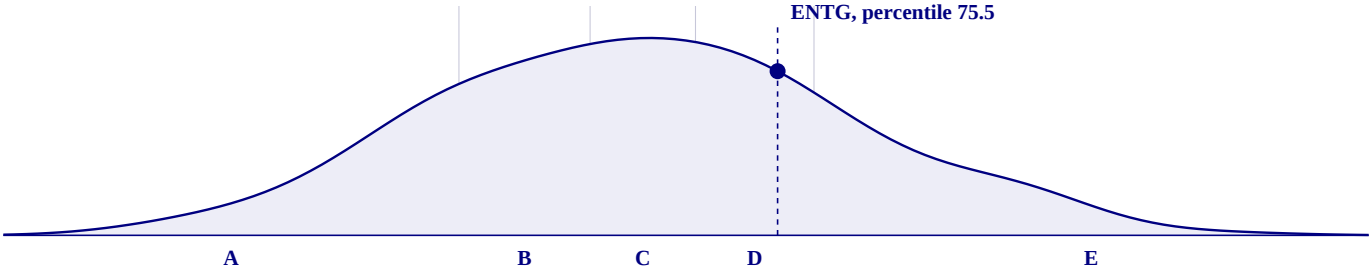
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 51.2						
Gross profitability	17.0%	22.3%		67.3	267	2025-12-31
Return on invested capital	5.8%	9.9%		73.2	98	2025-12-31
Accruals ratio	(5.5%)	(3.7%)		36.2	288	2025-12-31

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Gross margin stability, five years	1.6 pts	2.1 pts	28.1	222	2025-12-31
Solvency, sleeve percentile 56.8					
Altman Z double-prime	not computable	3.74			
one or more required annual facts are missing					
Net debt to EBITDA	5.05x	1.75x	90.6	118	2025-12-31
Interest coverage	not computable	5.13x			
latest aligned inputs end 2024-12-31; latest annual assets end 2025-12-31					
Current ratio	3.35x	2.30x	22.9	302	2025-12-31
Growth and financing, sleeve percentile 65.3					
Revenue growth, three-year compound	(0.9%)	2.3%	66.9	261	2025-12-31
Free cash flow growth, three-year compound	not computable	13.5%			
current FCF must be positive and base FCF must exceed $100,000					
Reinvestment rate	36.0%	24.5%	39.6	140	2025-12-31
Asset growth, three years	(6.3%)	4.2%	84.8	265	2025-12-31
Net share issuance, one year	0.6%	(0.04%)	69.9	240	2026-02-06

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
181	Esab Corp. (ESAB)	73.5	D	
182	Loar Holdings Inc. (LOAR)	73.9	D	
183	Griffon Corp. (GFF)	74.3	D	
184	StandardAero, Inc. (SARO)	74.7	D	
185	Carrier Global Corp. (CARR)	75.1	D	
186	Entegris Inc. (ENTG)	75.5	D	
187	Johnson Controls International plc (JCI)	75.9	D	
188	Illinois Tool Works Inc. (ITW)	76.3	D	
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	

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	68.6%	10.0%	87
Distance from 52-week high	(32.3%)	(32.1%)	49
EBIT to enterprise value	2.1%	4.5%	28
Free cash flow yield	2.1%	3.8%	33
Book value to price	0.23	0.39	22
Sales to price	0.17	0.60	7
Composite equity issuance, five years	10.3%	(9.5%)	76
Relative strength against the sector, log excess return	0.44	0.01	87

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Twelve-month failure probability, CHS model	not computable	0.04%

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 6 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	fail
Gross margin improved	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$356.5M
Operating cash flow, four quarters	$798.0M
Months of runway	not finite
Days since last periodic filing	25 (10-Q received Oct 29, 2026)
Median daily dollar volume, 63 sessions	$359.4M

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	gross profit	us-gaap:GrossProfit	$1.4B	2025-12-31	2026-02-11	10-K	26-000012
2	assets	us-gaap:Assets	$8.4B	2025-12-31	2026-02-11	10-K	26-000012
3	operating income	us-gaap:OperatingIncomeLoss	$455.9M	2025-12-31	2026-02-11	10-K	26-000012
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$254.6M	2025-12-31	2026-02-11	10-K	26-000012
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$18.0M	2025-12-31	2026-02-11	10-K	26-000012
6	total debt	us-gaap:LongTermDebt	$3.7B	2025-12-31	2026-02-11	10-K	26-000012
7	book equity	us-gaap:StockholdersEquityIncludingPortionAttributableT...	$4.0B	2025-12-31	2026-02-11	10-K	26-000012
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$360.4M	2025-12-31	2026-02-11	10-K	26-000012
9	total debt	us-gaap:LongTermDebt	$4.0B	2024-12-31	2026-02-11	10-K	26-000012
10	book equity	us-gaap:StockholdersEquityIncludingPortionAttributableT...	$3.7B	2024-12-31	2026-02-11	10-K	26-000012
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$329.2M	2024-12-31	2026-02-11	10-K	26-000012
12	net income	us-gaap:NetIncomeLoss	$235.6M	2025-12-31	2026-02-11	10-K	26-000012
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$695.4M	2025-12-31	2026-02-11	10-K	26-000012
14	assets	us-gaap:Assets	$8.4B	2024-12-31	2026-02-11	10-K	26-000012
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$3.2B	2025-12-31	2026-02-11	10-K	26-000012
16	gross profit	us-gaap:GrossProfit	$1.5B	2024-12-31	2026-02-11	10-K	26-000012
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$3.2B	2024-12-31	2026-02-11	10-K	26-000012
18	gross profit	us-gaap:GrossProfit	$1.5B	2023-12-31	2026-02-11	10-K	26-000012
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$3.5B	2023-12-31	2026-02-11	10-K	26-000012
20	gross profit	us-gaap:GrossProfit	$1.4B	2022-12-31	2025-02-12	10-K	25-000015
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$3.3B	2022-12-31	2025-02-12	10-K	25-000015
22	gross profit	us-gaap:GrossProfit	$1.1B	2021-12-31	2024-02-15	10-K	24-000009
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$2.3B	2021-12-31	2024-02-15	10-K	24-000009
24	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$205.3M	2025-12-31	2026-02-11	10-K	26-000012
25	operating income	us-gaap:OperatingIncomeLoss	$533.9M	2024-12-31	2026-02-11	10-K	26-000012
26	interest expense	us-gaap:InterestExpense	$215.2M	2024-12-31	2025-02-12	10-K	25-000015
27	current assets	us-gaap:AssetsCurrent	$1.6B	2025-12-31	2026-02-11	10-K	26-000012
28	current liabilities	us-gaap:LiabilitiesCurrent	$488.6M	2025-12-31	2026-02-11	10-K	26-000012
29	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$299.2M	2025-12-31	2026-02-11	10-K	26-000012
30	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$631.7M	2024-12-31	2026-02-11	10-K	26-000012

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31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$315.6M	2024-12-31	2026-02-11	10-K	26-000012
32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$644.5M	2023-12-31	2026-02-11	10-K	26-000012
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$456.8M	2023-12-31	2026-02-11	10-K	26-000012
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$363.1M	2022-12-31	2025-02-12	10-K	25-000015
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$466.2M	2022-12-31	2025-02-12	10-K	25-000015
36	current assets	us-gaap:AssetsCurrent	$1.6B	2024-12-31	2026-02-11	10-K	26-000012
37	current liabilities	us-gaap:LiabilitiesCurrent	$525.2M	2024-12-31	2026-02-11	10-K	26-000012
38	assets	us-gaap:Assets	$8.8B	2023-12-31	2025-02-12	10-K	25-000015
39	assets	us-gaap:Assets	$10.1B	2022-12-31	2024-02-15	10-K	24-000009
40	shares outstanding	dei:EntityCommonStockSharesOutstanding	152,000,000	2026-02-06	2026-02-11	10-K	26-000012
41	shares outstanding	dei:EntityCommonStockSharesOutstanding	151,126,743	2025-02-05	2025-02-12	10-K	25-000015

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