

Aptiv plc (APTIV)

NYSE; consumer durables; SIC 3714, Motor Vehicle Parts & Accessories; CIK 0001521332

Aptiv plc	
APTIV; consumer durables	
Grade	B A B C D E second fifth of 460 graded peers percentile 32.0; sampling error 2.3 points; lower is stronger
Rank	144 of 460
Profitability	C/D percentile 58.2
Solvency	C percentile 47.0
Growth and financing	A/B percentile 20.3
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 \$23.4B
Standard universe	inside revenue above \$1M and assets above \$10M
Warnings	none active not computable: distress
Inputs computable	13 of 14
Graded from	filings received through Feb 6, 2026 245 days before the rescan; latest periodic filing 10-Q received Aug 4, 2026
Last close	\$44.20 2026-10-08; market equity \$9.2B
Price used in grade	None

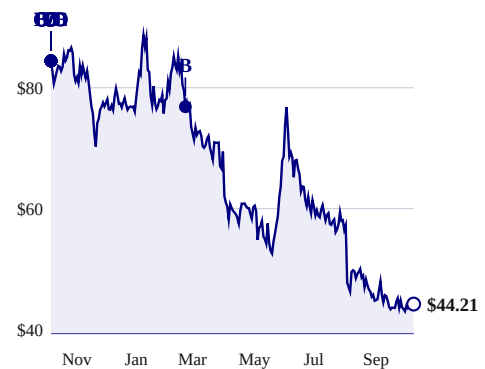


B, the elk

second fifth of its sector; letters are fifths of the 460 graded peers

Share price, twelve months to the rescan

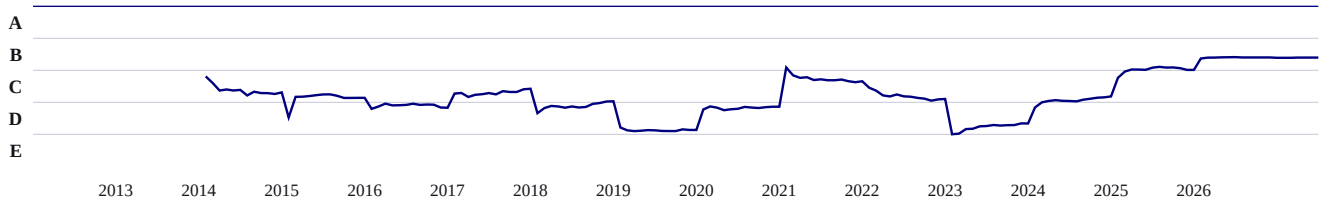
split-adjusted close; the letter is fixed at the rescan that set it



Rescans on file: C/D from Mar 21, 2024, C from Nov 21, 2024, B/C from Mar 21, 2025, B from Feb 6, 2026

Letter at every rescan

Jan 21, 2012 to Oct 9, 2026; sector percentile, 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 6, 2026

In December 2024, Old Aptiv (as defined below), a public limited company formed under the laws of Jersey on May 19, 2011, completed its previously announced reorganization transaction (the "Transaction," or the "reorganization transaction"), in which Old Aptiv established a new publicly-listed Jersey parent company, Aptiv Holdings Limited ("New Aptiv"), which is resident for tax purposes in Switzerland. As a result of the Transaction, all issued and outstanding ordinary shares of Old Aptiv were exchanged on a

one-for-one basis for newly issued ordinary shares of New Aptiv.

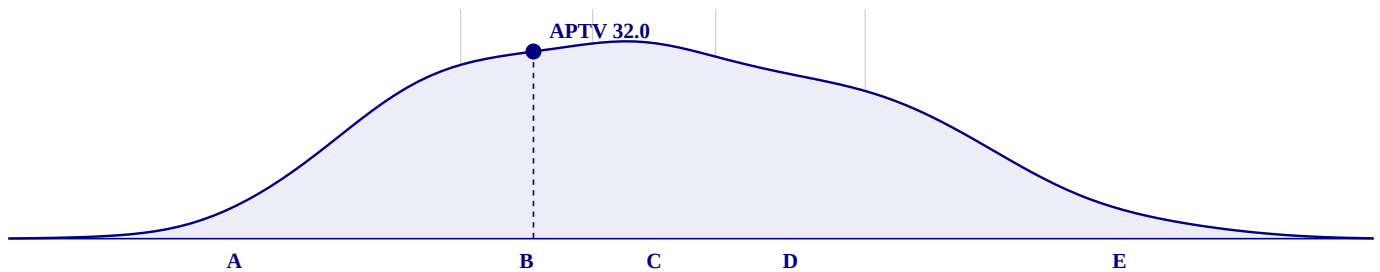
The fourteen inputs

lower percentile is stronger; equal-weighted sleeves

Input	Percentile, 0 to 100	Value	Peer median	Percentile	Peers	Period end
Profitability, sleeve percentile 58.2						
Gross profitability		16.6%	34.4%	76.4	476	2025-12-31
Return on invested capital		1.9%	8.9%	79.0	163	2025-12-31
Accruals ratio		(8.6%)	(5.1%)	29.6	525	2025-12-31
Gross margin stability, five years		1.6 pts	1.7 pts	47.8	407	2025-12-31
Solvency, sleeve percentile 47.0						
Twelve-month failure probability		not computable	0.04%			latest liabilities, cash plus short-term investments, book equity, and shares are required
Altman Z double-prime		2.94	2.11	37.9	402	2025-12-31
Net debt to EBITDA		2.86x	2.11x	63.4	187	2025-12-31
Interest coverage		3.28x	2.57x	44.9	128	2025-12-31
Current ratio		1.74x	1.55x	41.9	541	2025-12-31
Growth and financing, sleeve percentile 20.3						
Revenue growth, three-year compound		5.3%	1.4%	30.4	482	2025-12-31
Free cash flow growth, three-year compound		54.0%	8.3%	13.7	250	2025-12-31
Reinvestment rate		314.0%	12.0%	4.2	265	2025-12-31
Asset growth, three years		2.3%	2.0%	45.5	487	2025-12-31
Net share issuance, one year		(7.3%)	(0.3%)	7.9	382	2026-01-30

Among 460 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
139	Acushnet Holdings Corp. (GOLF)	30.9	B	
140	Natural Grocers by Vitamin Cottage, Inc. (NGVC)	31.1	B	
141	Freshpet, Inc. (FRPT)	31.7	B	
142	Biglari Holdings Inc. (BH)	31.7	B	
143	Biglari Holdings Inc. (BH-A)	31.7	B	
144	Aptiv plc (APTIV) <	32.0	B	
145	Oshkosh Corp. (OSK)	32.2	B	
146	Home Depot, Inc. (HD)	32.3	B	
147	Ethan Allen Interiors Inc. (ETD)	32.5	B	fortress
				balance sheet
148	Cal-Maine Foods Inc. (CALM)	32.5	B	fortress
				balance sheet

What the price implies

at the 2026-10-08 close; none enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(38.7%)	(0.2%)	12
Distance from 52-week high	(50.1%)	(25.6%)	18
EBIT to enterprise value	8.6%	5.0%	82
Free cash flow yield	16.7%	4.6%	92
Book value to price	0.95	0.45	77
Sales to price	2.22	1.49	65
Composite equity issuance, five years	(42.9%)	(16.0%)	8
Relative strength against the sector, log excess return	(0.47)	(0.01)	13

Diagnostics

not in the grade

Measure	Value
Piotroski F-score 8 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	pass
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	\$761.0M
Operating cash flow, four quarters	\$1.4B
Months of runway	not finite
Days since last periodic filing	66 (10-Q received Aug 4, 2026)
Median daily dollar volume, 63 sessions	\$154.5M

Sources

each row links to the filing index on sec.gov

#	Concept	XBRL tag	Value	Period end	Received	Form	Accession
1	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$20.4B	2025-12-31	2026-02-06	10-K	0001521332-26-000009
2	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	\$16.5B	2025-12-31	2026-02-06	10-K	0001521332-26-000009
3	assets	us-gaap:Assets	\$23.4B	2025-12-31	2026-02-06	10-K	0001521332-26-000009
4	operating income	us-gaap:OperatingIncomeLoss	\$1.2B	2025-12-31	2026-02-06	10-K	0001521332-26-000009
5	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraordinaryItemsNoncontrollingInterests	\$919.0M	2025-12-31	2026-02-06	10-K	0001521332-26-000009
6	income tax	us-gaap:IncomeTaxExpenseBenefit	\$700.0M	2025-12-31	2026-02-06	10-K	0001521332-26-000009
7	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	\$7.5B	2025-12-31	2026-02-06	10-K	0001521332-26-000009
8	book equity	us-gaap:StockholdersEquity	\$9.2B	2025-12-31	2026-02-06	10-K	0001521332-26-000009
9	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$1.9B	2025-12-31	2026-02-06	10-K	0001521332-26-000009
10	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	\$7.8B	2024-12-31	2026-02-06	10-K	0001521332-26-000009
11	book equity	us-gaap:StockholdersEquity	\$8.8B	2024-12-31	2026-02-06	10-K	0001521332-26-000009
12	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$1.6B	2024-12-31	2026-02-06	10-K	0001521332-26-000009
13	net income	us-gaap:NetIncomeLoss	\$165.0M	2025-12-31	2026-02-06	10-K	0001521332-26-000009
14	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$2.2B	2025-12-31	2026-02-06	10-K	0001521332-26-000009
15	assets	us-gaap:Assets	\$23.5B	2024-12-31	2026-02-06	10-K	0001521332-26-000009
16	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$19.7B	2024-12-31	2026-02-06	10-K	0001521332-26-000009
17	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	\$16.0B	2024-12-31	2026-02-06	10-K	0001521332-26-000009
18	revenue	us-gaap:Revenues	\$20.1B	2023-12-31	2026-02-06	10-K	0001521332-26-000009
19	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	\$16.6B	2023-12-31	2026-02-06	10-K	0001521332-26-000009
20	revenue	us-gaap:Revenues	\$17.5B	2022-12-31	2025-02-07	10-K	0001521332-25-000010

21	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	\$14.9B	2022-12-31	2025-02-07	10-K	0001521332-25-000010
22	revenue	us-gaap:Revenues	\$15.6B	2021-12-31	2024-02-06	10-K	0001521332-24-000011
23	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	\$13.2B	2021-12-31	2024-02-06	10-K	0001521332-24-000011
24	current assets	us-gaap:AssetsCurrent	\$8.7B	2025-12-31	2026-02-06	10-K	0001521332-26-000009
25	current liabilities	us-gaap:LiabilitiesCurrent	\$5.0B	2025-12-31	2026-02-06	10-K	0001521332-26-000009
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	\$6.2B	2025-12-31	2026-02-06	10-K	0001521332-26-000009
27	liabilities	us-gaap:Liabilities	\$13.9B	2025-12-31	2026-02-06	10-K	0001521332-26-000009
28	depreciation amortization	us-gaap:Depreciation	\$783.0M	2025-12-31	2026-02-06	10-K	0001521332-26-000009
29	interest expense	us-gaap:InterestExpense	\$361.0M	2025-12-31	2026-02-06	10-K	0001521332-26-000009
30	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	\$656.0M	2025-12-31	2026-02-06	10-K	0001521332-26-000009
31	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$2.4B	2024-12-31	2026-02-06	10-K	0001521332-26-000009
32	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	\$830.0M	2024-12-31	2026-02-06	10-K	0001521332-26-000009
33	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$1.9B	2023-12-31	2026-02-06	10-K	0001521332-26-000009
34	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	\$906.0M	2023-12-31	2026-02-06	10-K	0001521332-26-000009
35	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$1.3B	2022-12-31	2025-02-07	10-K	0001521332-25-000010
36	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$844.0M	2022-12-31	2023-02-08	10-K	0001521332-23-000013
37	current assets	us-gaap:AssetsCurrent	\$7.8B	2024-12-31	2026-02-06	10-K	0001521332-26-000009
38	current liabilities	us-gaap:LiabilitiesCurrent	\$5.1B	2024-12-31	2026-02-06	10-K	0001521332-26-000009
39	assets	us-gaap:Assets	\$24.4B	2023-12-31	2025-02-07	10-K	0001521332-25-000010
40	assets	us-gaap:Assets	\$21.9B	2022-12-31	2024-02-06	10-K	0001521332-24-000011
41	shares outstanding	dei:EntityCommonStockSharesOutstanding	212,748,401	2026-01-30	2026-02-06	10-K	0001521332-26-000009
42	shares outstanding	dei:EntityCommonStockSharesOutstanding	229,446,368	2025-01-31	2025-02-07	10-K	0001521332-25-000010