

Element Solutions Inc. (ESI)

NYSE; chemicals; SIC 2890, Miscellaneous Chemical Products; CIK 0001590714

Element Solutions Inc. ESI; chemicals	
Grade	C A B C D E middle fifth of 331 graded peers percentile 53.6; sampling error 2.7 points; lower is stronger
Rank	167 of 331
Profitability	C percentile 53.8
Solvency	B/C percentile 42.3
Growth and financing	C percentile 56.7
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 \$5.1B
Standard universe	inside revenue above \$1M and assets above \$10M
Warnings	none active not computable: distress
Inputs computable	12 of 14
Graded from	filings received through Feb 18, 2026 233 days before the rescans; latest periodic filing 10-Q received Jul 28, 2026
Last close	\$36.69 2026-10-08; market equity \$8.9B
Price used in grade	None

C, the tortoise

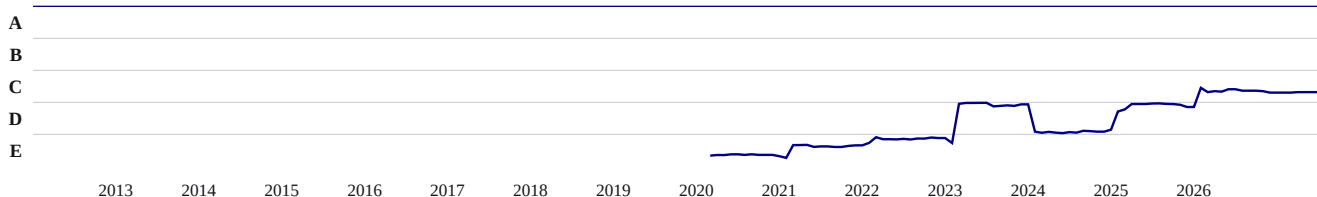
middle fifth of its sector; letters are fifths of the 331 graded peers

Share price, twelve months to the rescans

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

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 18, 2026

Unless the context otherwise indicates or requires, all product names, trade names, trademarks, service marks or logos used in this 2025 Annual Report are part of our intellectual property, although the "®" and "TM" trademark designations may have been omitted.

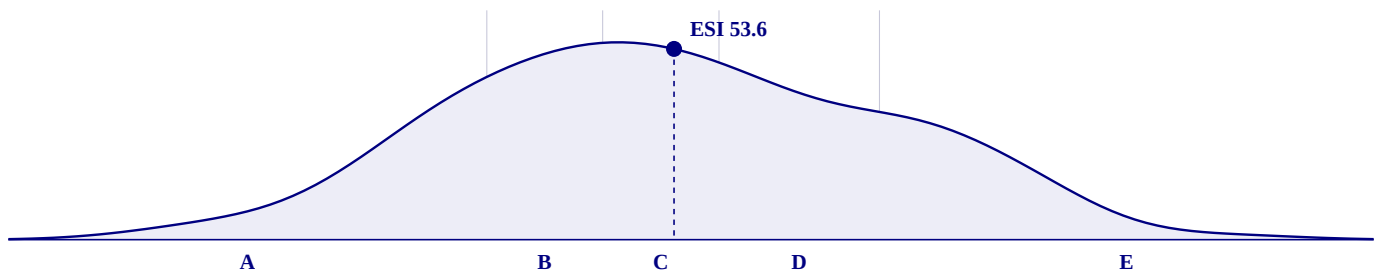
The fourteen inputs

lower percentile is stronger; equal-weighted sleeves

Input	Percentile, 0 to 100	Value	Peer median	Percentile	Peers	Period end
Profitability, sleeve percentile 53.8						
Gross profitability		21.0%	21.3%	48.6	359	2025-12-31
Return on invested capital		6.6%	9.5%	62.6	124	2025-12-31
Accruals ratio		(2.0%)	(4.2%)	69.2	400	2025-12-31
Gross margin stability, five years		1.8 pts	2.2 pts	35.0	301	2025-12-31
Solvency, sleeve percentile 42.3						
Twelve-month failure probability		not computable	0.05%			latest liabilities, cash plus short-term investments, book equity, and shares are required
Altman Z double-prime		2.52	3.41	51.7	301	2025-12-31
Net debt to EBITDA		2.03x	1.88x	56.4	150	2025-12-31
Interest coverage		not computable	4.16x			one or more required annual facts are missing
Current ratio		3.68x	2.20x	18.7	423	2025-12-31
Growth and financing, sleeve percentile 56.7						
Revenue growth, three-year compound		0.02%	1.2%	55.6	350	2025-12-31
Free cash flow growth, three-year compound		(2.8%)	12.6%	76.4	179	2025-12-31
Reinvestment rate		70.4%	24.3%	26.0	170	2025-12-31
Asset growth, three years		1.3%	2.9%	59.5	369	2025-12-31
Net share issuance, one year		0.5%	0.0%	65.9	321	2026-02-12

Among 331 peers

chemicals; 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
162	Gorman Rupp Co. (GRC)	52.4	C	
163	Linde plc (LIN)	52.7	C	
164	Ouster, Inc. (OUST)	52.8	C	fortress balance sheet
165	General Dynamics Corp. (GD)	53.1	C	
166	Eastern Co. (EML)	53.5	C	
167	Element Solutions Inc. (ESI) <	53.6	C	
168	Owens Corning (OC)	53.9	C	
169	Edgewell Personal Care Co. (EPC)	53.9	C	
170	Greenland Technologies Holding Corp. (GTEC)	54.3	C	dilution, fortress balance sheet

171	Procter & Gamble Co. (PG)	54.5	C
172	Hayward Holdings, Inc. (HAYW)	54.7	C

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	41.9%	13.8%	76
Distance from 52-week high	(25.2%)	(24.2%)	48
EBIT to enterprise value	3.2%	3.9%	42
Free cash flow yield	2.5%	3.2%	42
Book value to price	0.31	0.39	42
Sales to price	0.29	0.57	25
Composite equity issuance, five years	(8.7%)	(9.9%)	55
Relative strength against the sector, log excess return	0.18	(0.02)	73

Diagnostics

not in 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	\$177.3M
Operating cash flow, four quarters	\$197.2M
Months of runway	not finite
Days since last periodic filing	73 (10-Q received Jul 28, 2026)
Median daily dollar volume, 63 sessions	\$153.2M

Sources

each row links to the filing index on sec.gov

#	Concept	XBRL tag	Value	Period end	Received	Form	Accession
1	gross profit	us-gaap:GrossProfit	\$1.1B	2025-12-31	2026-02-18	10-K	0001590714-26-000018
2	assets	us-gaap:Assets	\$5.1B	2025-12-31	2026-02-18	10-K	0001590714-26-000018
3	operating income	us-gaap:OperatingIncomeLoss	\$342.2M	2025-12-31	2026-02-18	10-K	0001590714-26-000018
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraord	\$255.6M	2025-12-31	2026-02-18	10-K	0001590714-26-000018
5	income tax	us-gaap:IncomeTaxExpenseBenefit	\$74.6M	2025-12-31	2026-02-18	10-K	0001590714-26-000018
6	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	\$1.6B	2025-12-31	2026-02-18	10-K	0001590714-26-000018
7	book equity	us-gaap:StockholdersEquity	\$2.7B	2025-12-31	2026-02-18	10-K	0001590714-26-000018
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$626.5M	2025-12-31	2026-02-18	10-K	0001590714-26-000018
9	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	\$1.8B	2024-12-31	2026-02-18	10-K	0001590714-26-000018
10	book equity	us-gaap:StockholdersEquity	\$2.4B	2024-12-31	2026-02-18	10-K	0001590714-26-000018
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$359.4M	2024-12-31	2026-02-18	10-K	0001590714-26-000018
12	net income	us-gaap:NetIncomeLoss	\$190.8M	2025-12-31	2026-02-18	10-K	0001590714-26-000018
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesContinuingOperati	\$289.8M	2025-12-31	2026-02-18	10-K	0001590714-26-000018
14	assets	us-gaap:Assets	\$4.9B	2024-12-31	2026-02-18	10-K	0001590714-26-000018
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$2.6B	2025-12-31	2026-02-18	10-K	0001590714-26-000018
16	gross profit	us-gaap:GrossProfit	\$1.0B	2024-12-31	2026-02-18	10-K	0001590714-26-000018
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$2.5B	2024-12-31	2026-02-18	10-K	0001590714-26-000018
18	gross profit	us-gaap:GrossProfit	\$918.5M	2023-12-31	2026-02-18	10-K	0001590714-26-000018
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$2.3B	2023-12-31	2026-02-18	10-K	0001590714-26-000018
20	gross profit	us-gaap:GrossProfit	\$952.7M	2022-12-31	2025-02-19	10-K	0001590714-25-000022

21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$2.5B	2022-12-31	2025-02-19	10-K	0001590714-25-000022
22	gross profit	us-gaap:GrossProfit	\$960.8M	2021-12-31	2024-02-21	10-K	0001590714-24-000054
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$2.4B	2021-12-31	2024-02-21	10-K	0001590714-24-000054
24	current assets	us-gaap:AssetsCurrent	\$1.6B	2025-12-31	2026-02-18	10-K	0001590714-26-000018
25	current liabilities	us-gaap:LiabilitiesCurrent	\$429.9M	2025-12-31	2026-02-18	10-K	0001590714-26-000018
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-\$904.6M	2025-12-31	2026-02-18	10-K	0001590714-26-000018
27	liabilities	us-gaap:Liabilities	\$2.4B	2025-12-31	2026-02-18	10-K	0001590714-26-000018
28	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	\$151.2M	2025-12-31	2026-02-18	10-K	0001590714-26-000018
29	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$62.2M	2025-12-31	2026-02-18	10-K	0001590714-26-000018
30	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesContinuingOperations	\$362.0M	2024-12-31	2026-02-18	10-K	0001590714-26-000018
31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$68.4M	2024-12-31	2026-02-18	10-K	0001590714-26-000018
32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesContinuingOperations	\$33.6M	2023-12-31	2026-02-18	10-K	0001590714-26-000018
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$52.7M	2023-12-31	2026-02-18	10-K	0001590714-26-000018
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$295.9M	2022-12-31	2023-02-22	10-K	0001590714-23-000027
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$47.8M	2022-12-31	2025-02-19	10-K	0001590714-25-000022
36	current assets	us-gaap:AssetsCurrent	\$1.3B	2024-12-31	2026-02-18	10-K	0001590714-26-000018
37	current liabilities	us-gaap:LiabilitiesCurrent	\$379.7M	2024-12-31	2026-02-18	10-K	0001590714-26-000018
38	assets	us-gaap:Assets	\$5.0B	2023-12-31	2025-02-19	10-K	0001590714-25-000022
39	assets	us-gaap:Assets	\$4.9B	2022-12-31	2024-02-21	10-K	0001590714-24-000054
40	shares outstanding	dei:EntityCommonStockSharesOutstanding	243,578,414	2026-02-12	2026-02-18	10-K	0001590714-26-000018
41	shares outstanding	dei:EntityCommonStockSharesOutstanding	242,452,327	2025-02-14	2025-02-19	10-K	0001590714-25-000022