

ITT Inc. (ITT)

NYSE; manufacturing; SIC 3561, Pumps & Pumping Equipment; CIK 0000216228

ITT Inc. ITT; manufacturing	
Grade	A ▼ A B C D E strongest fifth of 255 graded peers percentile 2.8; sampling error 3.0 points; lower is stronger
Rank	8 of 255
Profitability	B percentile 36.8
Solvency	A/B percentile 21.1
Growth and financing	B percentile 28.1
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 \$6.3B
Standard universe	inside revenue above \$1M and assets above \$10M
Warnings	none active; fortress balance sheet not computable: distress
Inputs computable	12 of 14
Graded from	filings received through Feb 9, 2026 242 days before the rescans; latest periodic filing 10-Q received Aug 6, 2026
Last close	\$198.73 2026-10-08; market equity \$17.8B
Price used in grade	None

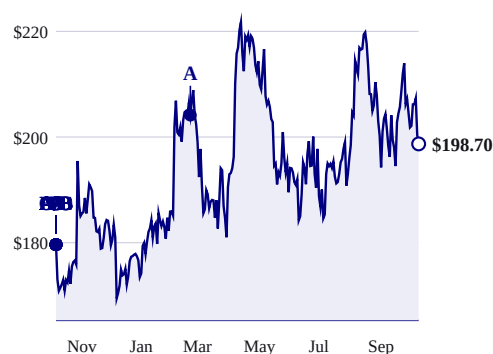


A, the bull

strongest fifth of its sector;
letters are fifths of the 255
graded peers

Share price, twelve months to the rescans

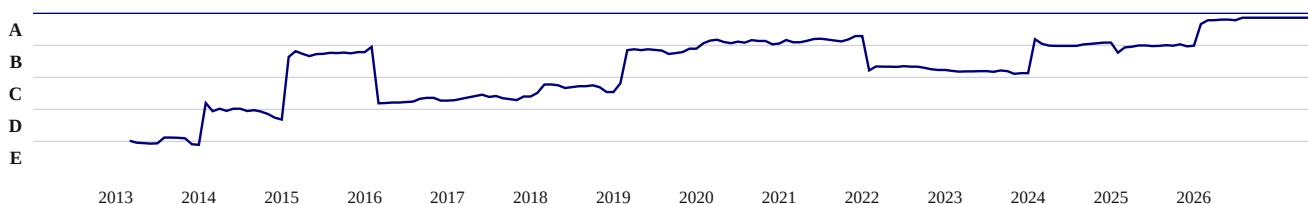
split-adjusted close; the letter is fixed at the rescans that set it



Rescans on file: A/B from Mar 21, 2024, B from Feb 21, 2025, A/B from Mar 21, 2025, A from Feb 21, 2026

Letter at every rescans

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 9, 2026

(Amounts reported in this Annual Report on Form 10-K, except per share amounts, are stated in millions unless otherwise specified. References herein to "ITT," the "Company," and such words as "we," "us," and "our" include ITT Inc. and its subsidiaries on a consolidated basis, unless the context otherwise indicates.) ITT is a diversified manufacturer of highly engineered critical components and customized technology solutions primarily for the transportation, industrial and energy markets. We manufacture components that

are integral to the operation of equipment, systems and manufacturing processes in these key markets.

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 36.8						
Gross profitability		22.1%	21.9%	46.4	275	2025-12-31
Return on invested capital		19.0%	9.7%	19.2	100	2025-12-31
Accruals ratio		(3.3%)	(3.6%)	52.8	308	2025-12-31
Gross margin stability, five years		1.6 pts	2.1 pts	28.9	229	2025-12-31
Solvency, sleeve percentile 21.1						
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		6.34	3.66	20.2	244	2025-12-31
Net debt to EBITDA		(1.48x)	1.78x	4.2	121	2025-12-31
Interest coverage		not computable	5.09x			latest aligned inputs end 2014-12-31; latest annual assets end 2025-12-31
Current ratio		2.58x	2.25x	38.9	325	2025-12-31
Growth and financing, sleeve percentile 28.1						
Revenue growth, three-year compound		9.6%	2.1%	23.1	269	2025-12-31
Free cash flow growth, three-year compound		46.6%	13.9%	13.0	139	2025-12-31
Reinvestment rate		287.0%	26.4%	5.8	139	2025-12-31
Asset growth, three years		18.6%	4.4%	12.6	279	2025-12-31
Net share issuance, one year		5.7%	0.01%	86.0	243	2026-02-06

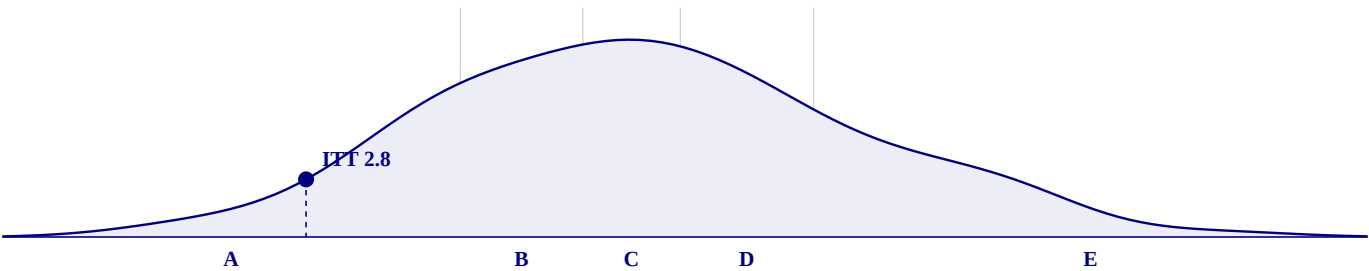
Warnings

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

Check	Measured
Fortress balance sheet	cash minus debt is 1,221,400,000 USD; Altman Z is not used

Among 255 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
3	Xpel, Inc. (XPEL)	0.8	A	fortress balance sheet

4	Cactus, Inc. (WHD)	1.2	A	fortress
				balance sheet
5	Deckers Outdoor Corp. (DECK)	1.6	A	
6	Proto Labs Inc. (PRLB)	2.0	A	fortress
				balance sheet
7	Franklin Electric Co. Inc. (FELE)	2.4	A	
8	ITT Inc. (ITT) <	2.8	A	fortress
				balance sheet
9	Smith Midland Corp. (SMID)	3.1	A	late filer
10	Alamo Group Inc. (ALG)	3.5	A	fortress
				balance sheet
11	Simpson Manufacturing Co., Inc. (SSD)	3.9	A	fortress
				balance sheet
12	ACM Research, Inc. (ACMR)	4.3	A	fortress
				balance sheet
13	Graco Inc. (GGG)	4.7	A	

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	12.5%	13.7%	49
Distance from 52-week high	(10.4%)	(24.3%)	86
EBIT to enterprise value	3.4%	4.1%	42
Free cash flow yield	3.1%	3.4%	45
Book value to price	0.27	0.34	38
Sales to price	0.22	0.54	20
Composite equity issuance, five years	(2.5%)	(9.5%)	61
Relative strength against the sector, log excess return	(0.02)	(0.00)	49

Diagnostics

not in the grade

Measure	Value
Piotroski F-score 5 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	fail
Current ratio improved	pass
No new shares issued	fail
Gross margin improved	pass
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	\$590.8M
Operating cash flow, four quarters	\$632.8M
Months of runway	not finite
Days since last periodic filing	64 (10-Q received Aug 6, 2026)
Median daily dollar volume, 63 sessions	\$152.6M

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	\$1.4B	2025-12-31	2026-02-09	10-K	0000216228-26-000012
2	assets	us-gaap:Assets	\$6.3B	2025-12-31	2026-02-09	10-K	0000216228-26-000012
3	operating income	us-gaap:OperatingIncomeLoss	\$684.5M	2025-12-31	2026-02-09	10-K	0000216228-26-000012
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraordinaryItemsUnusualItems	\$614.5M	2025-12-31	2026-02-09	10-K	0000216228-26-000012

5	income tax	us-gaap:IncomeTaxExpenseBenefit	\$160.1M	2025-12-31	2026-02-09	10-K	0000216228-26-000012
6	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	\$521.5M	2025-12-31	2026-02-09	10-K	0000216228-26-000012
7	book equity	us-gaap:StockholdersEquity	\$4.1B	2025-12-31	2026-02-09	10-K	0000216228-26-000012
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$1.7B	2025-12-31	2026-02-09	10-K	0000216228-26-000012
9	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	\$232.6M	2024-12-31	2026-02-09	10-K	0000216228-26-000012
10	book equity	us-gaap:StockholdersEquity	\$2.8B	2024-12-31	2026-02-09	10-K	0000216228-26-000012
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$439.3M	2024-12-31	2026-02-09	10-K	0000216228-26-000012
12	net income	us-gaap:NetIncomeLoss	\$488.0M	2025-12-31	2026-02-09	10-K	0000216228-26-000012
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesContinuingOperations	\$668.8M	2025-12-31	2026-02-09	10-K	0000216228-26-000012
14	assets	us-gaap:Assets	\$4.7B	2024-12-31	2026-02-09	10-K	0000216228-26-000012
15	revenue	us-gaap:Revenues	\$3.9B	2025-12-31	2026-02-09	10-K	0000216228-26-000012
16	gross profit	us-gaap:GrossProfit	\$1.2B	2024-12-31	2026-02-09	10-K	0000216228-26-000012
17	revenue	us-gaap:Revenues	\$3.6B	2024-12-31	2026-02-09	10-K	0000216228-26-000012
18	gross profit	us-gaap:GrossProfit	\$1.1B	2023-12-31	2026-02-09	10-K	0000216228-26-000012
19	revenue	us-gaap:Revenues	\$3.3B	2023-12-31	2026-02-09	10-K	0000216228-26-000012
20	gross profit	us-gaap:GrossProfit	\$922.3M	2022-12-31	2025-02-10	10-K	0000216228-25-000014
21	revenue	us-gaap:Revenues	\$3.0B	2022-12-31	2025-02-10	10-K	0000216228-25-000014
22	gross profit	us-gaap:GrossProfit	\$899.5M	2021-12-31	2024-02-12	10-K	0000216228-24-000020
23	revenue	us-gaap:Revenues	\$2.8B	2021-12-31	2024-02-12	10-K	0000216228-24-000020
24	current assets	us-gaap:AssetsCurrent	\$3.4B	2025-12-31	2026-02-09	10-K	0000216228-26-000012
25	current liabilities	us-gaap:LiabilitiesCurrent	\$1.3B	2025-12-31	2026-02-09	10-K	0000216228-26-000012
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	\$3.0B	2025-12-31	2026-02-09	10-K	0000216228-26-000012
27	liabilities	us-gaap:Liabilities	\$2.2B	2025-12-31	2026-02-09	10-K	0000216228-26-000012
28	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	\$143.2M	2025-12-31	2026-02-09	10-K	0000216228-26-000012
29	operating income	us-gaap:OperatingIncomeLoss	\$266.4M	2014-12-31	2017-02-17	10-K	0000216228-17-000006
30	interest expense	us-gaap:InterestExpense	\$4.0M	2014-12-31	2015-02-20	10-K	0000216228-15-000007
31	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	\$121.3M	2025-12-31	2026-02-09	10-K	0000216228-26-000012
32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesContinuingOperations	\$562.6M	2024-12-31	2026-02-09	10-K	0000216228-26-000012
33	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	\$123.9M	2024-12-31	2026-02-09	10-K	0000216228-26-000012
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesContinuingOperations	\$538.0M	2023-12-31	2026-02-09	10-K	0000216228-26-000012
35	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	\$107.6M	2023-12-31	2026-02-09	10-K	0000216228-26-000012
36	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesContinuingOperations	\$257.7M	2022-12-31	2025-02-10	10-K	0000216228-25-000014
37	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	\$103.9M	2022-12-31	2025-02-10	10-K	0000216228-25-000014
38	current assets	us-gaap:AssetsCurrent	\$1.9B	2024-12-31	2026-02-09	10-K	0000216228-26-000012
39	current liabilities	us-gaap:LiabilitiesCurrent	\$1.3B	2024-12-31	2026-02-09	10-K	0000216228-26-000012
40	assets	us-gaap:Assets	\$3.9B	2023-12-31	2025-02-10	10-K	0000216228-25-000014
41	assets	us-gaap:Assets	\$3.8B	2022-12-31	2024-02-12	10-K	0000216228-24-000020
42	shares outstanding	dei:EntityCommonStockSharesOutstanding	86,000,000	2026-02-06	2026-02-09	10-K	0000216228-26-000012
43	shares outstanding	dei:EntityCommonStockSharesOutstanding	81,400,000	2025-02-07	2025-02-10	10-K	0000216228-25-000014