

Moog Inc. (MOG-B)

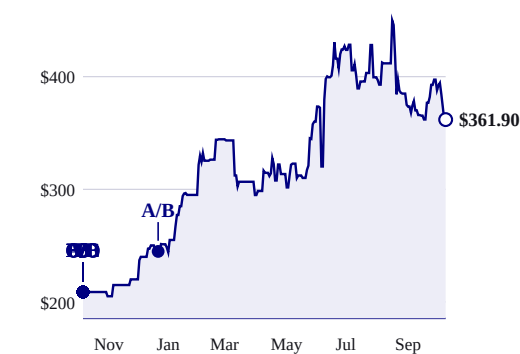
NYSE; manufacturing; SIC 3590, Misc Industrial & Commercial Machinery & Equipment; CIK 0000067887

Moog Inc. MOG-B; manufacturing	
Grade	A/B A B C D E on the A/B boundary of 255 graded peers percentile 17.5; sampling error 3.0 points; lower is stronger
Rank	45 of 255
Profitability	A/B percentile 20.2
Solvency	B/C percentile 38.8
Growth and financing	C percentile 47.2
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 \$4.4B
Standard universe	inside revenue above \$1M and assets above \$10M
Warnings	none active not computable: dilution, distress
Inputs computable	7 of 14
Graded from	filings received through Nov 26, 2025 317 days before the rescans; latest periodic filing 10-Q received Jul 31, 2026
Last close	\$420.07 2026-06-22; market equity \$0
Price used in grade	None



A/B, the bull
on the A/B boundary of its sector; letters are fifths of the 255 graded peers

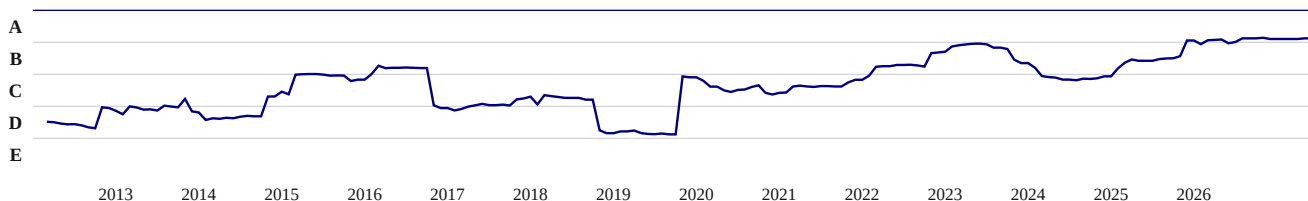
Share price, twelve months to the rescans
split-adjusted close; the letter is fixed at the rescans that set it



Rescans on file: C from Jun 21, 2024, B/C from Sep 21, 2024, B from Feb 21, 2025

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 Nov 26, 2025

Description of the Business. Moog is a worldwide designer, manufacturer and systems integrator of high performance precision motion and fluid controls and control systems for a broad range of applications in aerospace and defense and industrial markets. We have four operating segments: Space and Defense, Military Aircraft, Commercial Aircraft and Industrial. Additional information describing the business and comparative segment revenues, operating profits and related financial information for 2025, 2024 and

2023 are provided in Note 22 - Segments, of Item 8, Financial Statements and Supplementary Data, of this report. Distribution.

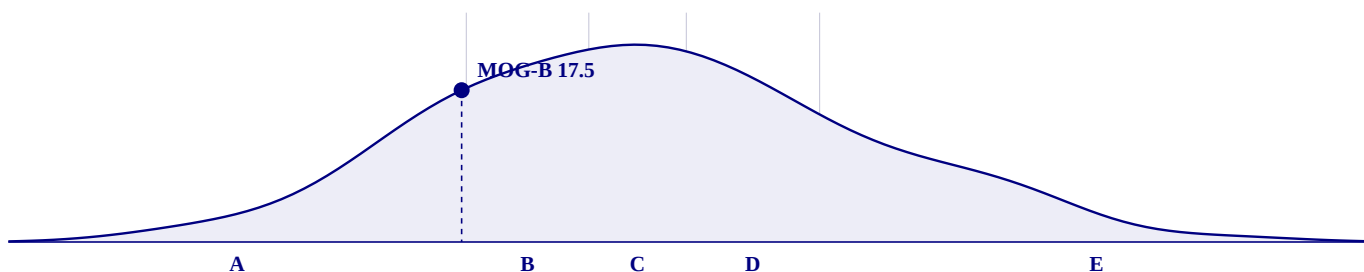
The fourteen inputs

lower percentile is stronger; equal-weighted sleeves

Input	Percentile, 0 to 100	Value	Peer median	Percentile	Peers	Period end
Profitability, sleeve percentile 20.2						
Gross profitability		23.9%	21.9%	38.5	275	2025-09-27
Return on invested capital		not computable	9.7%			latest aligned inputs end 2021-10-02; latest annual assets end 2025-09-27
Accruals ratio		not computable	(3.6%)			prior assets observation is 91 days earlier
Gross margin stability, five years		0.4 pts	2.1 pts	2.0	229	2025-09-27
Solvency, sleeve percentile 38.8						
Twelve-month failure probability		not computable	0.04%			firm-wide XBRL shares cannot be assigned to one ticker class
Altman Z double-prime		5.48	3.66	25.7	244	2025-09-27
Net debt to EBITDA		not computable	1.78x			latest aligned inputs end 2021-10-02; latest annual assets end 2025-09-27
Interest coverage		6.24x	5.09x	37.3	64	2025-09-27
Current ratio		2.12x	2.25x	53.2	325	2025-09-27
Growth and financing, sleeve percentile 47.2						
Revenue growth, three-year compound		8.3%	2.1%	27.4	269	2025-09-27
Free cash flow growth, three-year compound		6.1%	13.9%	67.0	139	2025-09-27
Reinvestment rate		not computable	26.4%			prior working capital is not one fiscal year earlier
Asset growth, three years		not computable	4.4%			four consecutive annual observations are required
Net share issuance, one year		not computable	0.01%			firm-wide XBRL shares cannot be assigned to one ticker class

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
41	Axcelis Technologies Inc. (ACLS)	15.7	A	
42	Gencor Industries Inc. (GENC)	16.1	A	late filer,
				fortress
				balance sheet
43	Movado Group Inc. (MOV)	16.5	A	
44	Kratos Defense & Security Solutions, Inc. (KTOS)	16.9	A	fortress
				balance sheet
45	Moog Inc. (MOG-A)	17.5	A/B	
46	Moog Inc. (MOG-B) <	17.5	A/B	
47	Douglas Dynamics, Inc. (PLOW)	18.1	A/B	
48	Mueller Water Products, Inc. (MWA)	18.5	A/B	
49	Power Solutions International, Inc. (PSIX)	18.9	A/B	
50	Carpenter Technology Corp. (CRS)	19.3	A/B	
51	Tecnoglass Holdings Inc. (TGLS)	19.7	A/B	

What the price implies

at the 2026-06-22 close; none enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	82.7%	13.7%	88
Distance from 52-week high	(19.6%)	(24.3%)	62
EBIT to enterprise value	not computable	4.1%	
Free cash flow yield	not computable	3.4%	
Book value to price	not computable	0.34	
Sales to price	not computable	0.54	
Composite equity issuance, five years	not computable	(9.5%)	
Relative strength against the sector, log excess return	0.47	(0.00)	88

Diagnostics

not in the grade

Measure	Value
Piotroski F-score None of 9, period end 2025-09-27	
Return on assets above zero	fail
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	fail
No new shares issued	fail
Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	\$66.8M
Operating cash flow, four quarters	\$485.6M
Months of runway	not finite

Days since last periodic filing	70 (10-Q received Jul 31, 2026)
Median daily dollar volume, 63 sessions	\$57,376

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	2025-09-27	2025-11-26	10-K	0001628280-25-054103
2	assets	us-gaap:Assets	\$4.4B	2025-09-27	2025-11-26	10-K	0001628280-25-054103
3	operating income	us-gaap:OperatingIncomeLoss	\$271.0M	2021-10-02	2023-11-14	10-K	0000067887-23-000115
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraordinaryItems	\$203.6M	2021-10-02	2023-11-14	10-K	0000067887-23-000115
5	income tax	us-gaap:IncomeTaxExpenseBenefit	\$46.6M	2021-10-02	2023-11-14	10-K	0000067887-23-000115
6	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	\$823.4M	2021-10-02	2021-11-15	10-K	0000067887-21-000065
7	book equity	us-gaap:StockholdersEquity	\$1.4B	2021-10-02	2023-11-14	10-K	0000067887-23-000115
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$99.6M	2021-10-02	2022-11-14	10-K	0000067887-22-000089
9	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	\$930.0M	2020-10-03	2021-11-15	10-K	0000067887-21-000065
10	book equity	us-gaap:StockholdersEquity	\$1.2B	2020-10-03	2022-11-14	10-K	0000067887-22-000089
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$84.6M	2020-10-03	2021-11-15	10-K	0000067887-21-000065
12	net income	us-gaap:NetIncomeLoss	\$235.0M	2025-09-27	2025-11-26	10-K	0001628280-25-054103
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$273.1M	2025-09-27	2025-11-26	10-K	0001628280-25-054103
14	assets	us-gaap:Assets	\$4.4B	2025-06-28	2025-11-26	10-K	0001628280-25-054103
15	revenue	us-gaap:Revenues	\$3.9B	2025-09-27	2025-11-26	10-K	0001628280-25-054103
16	gross profit	us-gaap:GrossProfit	\$1.0B	2024-09-28	2025-11-26	10-K	0001628280-25-054103
17	revenue	us-gaap:Revenues	\$3.6B	2024-09-28	2025-11-26	10-K	0001628280-25-054103
18	gross profit	us-gaap:GrossProfit	\$897.8M	2023-09-30	2025-11-26	10-K	0001628280-25-054103
19	revenue	us-gaap:Revenues	\$3.3B	2023-09-30	2025-11-26	10-K	0001628280-25-054103
20	gross profit	us-gaap:GrossProfit	\$820.8M	2022-10-01	2024-11-27	10-K	0000067887-24-000166
21	revenue	us-gaap:Revenues	\$3.0B	2022-10-01	2024-11-27	10-K	0000067887-24-000166
22	gross profit	us-gaap:GrossProfit	\$775.7M	2021-10-02	2023-11-14	10-K	0000067887-23-000115
23	revenue	us-gaap:Revenues	\$2.9B	2021-10-02	2023-11-14	10-K	0000067887-23-000115
24	current assets	us-gaap:AssetsCurrent	\$2.4B	2025-09-27	2025-11-26	10-K	0001628280-25-054103
25	current liabilities	us-gaap:LiabilitiesCurrent	\$1.1B	2025-09-27	2025-11-26	10-K	0001628280-25-054103
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	\$2.8B	2025-09-27	2025-11-26	10-K	0001628280-25-054103
27	operating income	us-gaap:OperatingIncomeLoss	\$449.6M	2025-09-27	2025-11-26	10-K	0001628280-25-054103
28	book equity	us-gaap:StockholdersEquity	\$2.0B	2025-09-27	2025-11-26	10-K	0001628280-25-054103
29	liabilities	us-gaap:Liabilities	\$2.4B	2025-09-27	2025-11-26	10-K	0001628280-25-054103
30	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	\$90.2M	2021-10-02	2023-11-14	10-K	0000067887-23-000115
31	interest expense	us-gaap:InterestExpense	\$72.1M	2025-09-27	2025-11-26	10-K	0001628280-25-054103
32	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$144.7M	2025-09-27	2025-11-26	10-K	0001628280-25-054103
33	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$197.9M	2024-09-28	2025-11-26	10-K	0001628280-25-054103
34	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$152.0M	2024-09-28	2025-11-26	10-K	0001628280-25-054103
35	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$139.7M	2023-09-30	2025-11-26	10-K	0001628280-25-054103
36	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$177.3M	2023-09-30	2025-11-26	10-K	0001628280-25-054103
37	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$246.8M	2022-10-01	2024-11-27	10-K	0000067887-24-000166
38	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$139.4M	2022-10-01	2024-11-27	10-K	0000067887-24-000166
39	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	\$103.7M	2025-09-27	2025-11-26	10-K	0001628280-25-054103
40	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraordinaryItems	\$312.6M	2021-10-02	2023-11-14	10-K	0001628280-25-054103
41	income tax	us-gaap:IncomeTaxExpenseBenefit	\$77.6M	2025-09-27	2025-11-26	10-K	0001628280-25-054103
42	assets	us-gaap:Assets	\$4.3B	2025-03-29	2025-11-26	10-K	0001628280-25-054103
43	assets	us-gaap:Assets	\$4.2B	2024-12-28	2025-11-26	10-K	0001628280-25-054103