

Pentair plc (PNR)

NYSE; manufacturing; SIC 3550, Special Industry Machinery (No Metalworking Machinery); CIK 0000077360

Pentair plc PNR; manufacturing	
Grade	C A B C D E middle fifth of 255 graded peers percentile 56.3; sampling error 3.0 points; lower is stronger
Rank	144 of 255
Profitability	C percentile 52.0
Solvency	C percentile 53.1
Growth and financing	C percentile 46.7
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 \$6.9B
Standard universe	inside revenue above \$1M and assets above \$10M
Warnings	none active not computable: distress
Inputs computable	10 of 14
Graded from	filings received through Feb 24, 2026 227 days before the rescans; latest periodic filing 10-Q received Jul 28, 2026
Last close	\$52.32 2026-10-08; market equity \$8.5B
Price used in grade	None



C, the tortoise

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

Share price, twelve months to the rescans

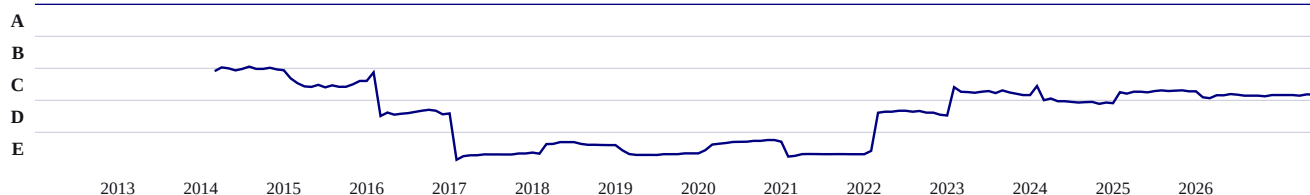
split-adjusted close; the letter is fixed at the rescans that set it



Rescans on file: C/D from Sep 26, 2026, C from Sep 30, 2026, C/D from Oct 6, 2026, C from Oct 7

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 24, 2026

Unless the context otherwise indicates, references herein to "Pentair," the "Company," and such words as "we," "us," and "our" include Pentair plc and its consolidated subsidiaries. At Pentair, we help the world sustainably move, improve and enjoy water, life's most essential resource. From our residential and commercial water solutions to industrial water management and everything in between, Pentair is an S&P 500 company focused on smart, sustainable water solutions that help our planet and people thrive. Our

vision is to be the world's most valued sustainable water solutions company for our employees, customers and shareholders.

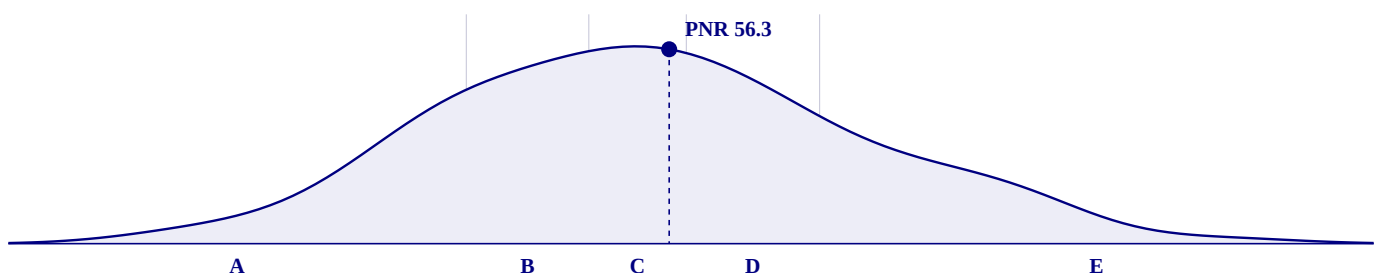
The fourteen inputs

lower percentile is stronger; equal-weighted sleeves

Input	Percentile, 0 to 100	Value	Peer median	Percentile	Peers	Period end
Profitability, sleeve percentile 52.0						
Gross profitability		24.6%	21.9%	36.1	275	2025-12-31
Return on invested capital		not computable	9.7%			latest aligned inputs end 2019-12-31; latest annual assets end 2025-12-31
Accruals ratio		(2.4%)	(3.6%)	60.6	308	2025-12-31
Gross margin stability, five years		2.7 pts	2.1 pts	59.2	229	2025-12-31
Solvency, sleeve percentile 53.1						
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		4.09	3.66	37.0	244	2025-12-31
Net debt to EBITDA		not computable	1.78x			latest aligned inputs end 2019-12-31; latest annual assets end 2025-12-31
Interest coverage		not computable	5.09x			latest aligned inputs end 2019-12-31; latest annual assets end 2025-12-31
Current ratio		1.61x	2.25x	69.1	325	2025-12-31
Growth and financing, sleeve percentile 46.7						
Revenue growth, three-year compound		0.4%	2.1%	59.0	269	2025-12-31
Free cash flow growth, three-year compound		38.9%	13.9%	16.7	139	2025-12-31
Reinvestment rate		6.9%	26.4%	62.3	139	2025-12-31
Asset growth, three years		2.1%	4.4%	60.8	279	2025-12-31
Net share issuance, one year		(1.0%)	0.01%	34.7	243	2025-12-31

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
139	Greenland Technologies Holding Corp. (GTEC)	54.3	C	dilution, fortress balance sheet
140	Hayward Holdings, Inc. (HAYW)	54.7	C	
141	Dover Corp. (DOV)	55.1	C	
142	Timken Co. (TKR)	55.5	C	
143	nVent Electric plc (NVT)	55.9	C	
144	Pentair plc (PNR) <	56.3	C	
145	Trio-Tech International (TRT)	56.7	C	fortress balance sheet
146	Northern Technologies International Corp. (NTIC)	57.1	C/D	
147	Kaiser Aluminum Corp. (KALU)	57.5	C/D	fortress balance sheet
148	RBC Bearings Inc. (RBC)	57.9	C/D	
149	Steel Dynamics Inc. (STLD)	58.3	C/D	

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	(44.8%)	13.7%	6
Distance from 52-week high	(53.2%)	(24.3%)	14
EBIT to enterprise value	8.3%	4.1%	87
Free cash flow yield	8.8%	3.4%	87
Book value to price	0.45	0.34	60
Sales to price	0.49	0.54	45
Composite equity issuance, five years	(10.3%)	(9.5%)	45
Relative strength against the sector, log excess return	(0.73)	(0.00)	6

Diagnostics

not in the grade

Measure	Value
Piotroski F-score 9 of 9, period end 2025-12-31	
Return on assets above zero	pass
Operating cash flow above zero	pass
Return on assets improved	pass
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	\$67.7M
Operating cash flow, four quarters	\$786.3M
Months of runway	not finite
Days since last periodic filing	73 (10-Q received Jul 28, 2026)
Median daily dollar volume, 63 sessions	\$159.4M

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	\$1.7B	2025-12-31	2026-02-24	10-K	0000077360-26-000007
2	assets	us-gaap:Assets	\$6.9B	2025-12-31	2026-02-24	10-K	0000077360-26-000007
3	operating income	us-gaap:OperatingIncomeLoss	\$432.5M	2019-12-31	2022-02-22	10-K	0000077360-22-000006
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraordina	\$407.5M	2019-12-31	2022-02-22	10-K	0000077360-22-000006

5	income tax	us-gaap:IncomeTaxExpenseBenefit	\$45.8M	2019-12-31	2022-02-22	10-K	0000077360-22-000006
6	total debt	us-gaap:LongTermDebt	\$1.0B	2019-12-31	2021-02-16	10-K	0000077360-21-000005
7	book equity	us-gaap:StockholdersEquityIncludingPortionAttributableToNoncontrollingInterest	\$2.4B	2019-12-31	2023-02-21	10-K	0000077360-23-000006
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$82.5M	2019-12-31	2020-02-25	10-K	0000077360-20-000006
9	total debt	us-gaap:LongTermDebt	\$787.6M	2018-12-31	2020-02-25	10-K	0000077360-20-000006
10	book equity	us-gaap:StockholdersEquityIncludingPortionAttributableToNoncontrollingInterest	\$1.8B	2018-12-31	2022-02-22	10-K	0000077360-22-000006
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$74.3M	2018-12-31	2020-02-25	10-K	0000077360-20-000006
12	net income	us-gaap:NetIncomeLoss	\$653.8M	2025-12-31	2026-02-24	10-K	0000077360-26-000007
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$814.8M	2025-12-31	2026-02-24	10-K	0000077360-26-000007
14	assets	us-gaap:Assets	\$6.4B	2024-12-31	2026-02-24	10-K	0000077360-26-000007
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$4.2B	2025-12-31	2026-02-24	10-K	0000077360-26-000007
16	gross profit	us-gaap:GrossProfit	\$1.6B	2024-12-31	2026-02-24	10-K	0000077360-26-000007
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$4.1B	2024-12-31	2026-02-24	10-K	0000077360-26-000007
18	gross profit	us-gaap:GrossProfit	\$1.5B	2023-12-31	2026-02-24	10-K	0000077360-26-000007
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$4.1B	2023-12-31	2026-02-24	10-K	0000077360-26-000007
20	gross profit	us-gaap:GrossProfit	\$1.4B	2022-12-31	2025-02-25	10-K	0000077360-25-000006
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$4.1B	2022-12-31	2025-02-25	10-K	0000077360-25-000006
22	gross profit	us-gaap:GrossProfit	\$1.3B	2021-12-31	2024-02-20	10-K	0000077360-24-000007
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$3.8B	2021-12-31	2024-02-20	10-K	0000077360-24-000007
24	current assets	us-gaap:AssetsCurrent	\$1.5B	2025-12-31	2026-02-24	10-K	0000077360-26-000007
25	current liabilities	us-gaap:LiabilitiesCurrent	\$959.3M	2025-12-31	2026-02-24	10-K	0000077360-26-000007
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	\$2.8B	2025-12-31	2026-02-24	10-K	0000077360-26-000007
27	operating income	us-gaap:OperatingIncomeLoss	\$857.5M	2025-12-31	2026-02-24	10-K	0000077360-26-000007
28	book equity	us-gaap:StockholdersEquityIncludingPortionAttributableToNoncontrollingInterest	\$3.9B	2025-12-31	2026-02-24	10-K	0000077360-26-000007
29	liabilities	us-gaap:Liabilities	\$3.0B	2025-12-31	2026-02-24	10-K	0000077360-26-000007
30	depreciation amortization	us-gaap:Depreciation	\$48.3M	2019-12-31	2022-02-22	10-K	0000077360-22-000006
31	interest expense	us-gaap:InterestExpense	\$30.1M	2019-12-31	2020-02-25	10-K	0000077360-20-000006
32	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$68.8M	2025-12-31	2026-02-24	10-K	0000077360-26-000007
33	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$766.7M	2024-12-31	2026-02-24	10-K	0000077360-26-000007
34	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$74.4M	2024-12-31	2026-02-24	10-K	0000077360-26-000007
35	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$619.2M	2023-12-31	2026-02-24	10-K	0000077360-26-000007
36	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$76.0M	2023-12-31	2026-02-24	10-K	0000077360-26-000007
37	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$363.3M	2022-12-31	2025-02-25	10-K	0000077360-25-000006
38	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$85.2M	2022-12-31	2025-02-25	10-K	0000077360-25-000006
39	depreciation amortization	us-gaap:Depreciation	\$59.6M	2025-12-31	2026-02-24	10-K	0000077360-26-000007
40	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraordinaryItemsDeductibleItems	\$756.5M	2025-12-31	2026-02-24	10-K	0000077360-26-000007
41	income tax	us-gaap:IncomeTaxExpenseBenefit	\$107.0M	2025-12-31	2026-02-24	10-K	0000077360-26-000007
42	current assets	us-gaap:AssetsCurrent	\$1.4B	2024-12-31	2026-02-24	10-K	0000077360-26-000007
43	current liabilities	us-gaap:LiabilitiesCurrent	\$895.1M	2024-12-31	2026-02-24	10-K	0000077360-26-000007
44	assets	us-gaap:Assets	\$6.6B	2023-12-31	2026-02-24	10-K	0000077360-26-000007
45	assets	us-gaap:Assets	\$6.4B	2022-12-31	2025-02-25	10-K	0000077360-25-000006
46	shares outstanding	dei:EntityCommonStockSharesOutstanding	163,235,706	2025-12-31	2026-02-24	10-K	0000077360-26-000007
47	shares outstanding	dei:EntityCommonStockSharesOutstanding	164,817,183	2024-12-31	2025-02-25	10-K	0000077360-25-000006