

Regal Rexnord Corp. (RRX)

NYSE; manufacturing; SIC 3569, General Industrial Machinery & Equipment, NEC; CIK 0000082811

Regal Rexnord Corp.

RRX; manufacturing

Grade

D/E

A

B

C

D

E

on the D/E boundary of 255 graded peers
percentile 80.3; sampling error 3.0 points; lower is stronger

Rank

205 of 255

Profitability

C/D

percentile 62.3

Solvency

D

percentile 71.7

Growth and financing

C

percentile 45.3

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 \$13.9B

Standard universe

inside
revenue above \$1M and assets above \$10M

Warnings

none active
not computable: distress

Inputs computable

11 of 14

Graded from

filings received through Feb 20, 2026
231 days before the rescans; latest periodic filing 10-Q received Aug 5, 2026

Last close

\$160.06
2026-10-08; market equity \$10.7B

Price used in grade

None

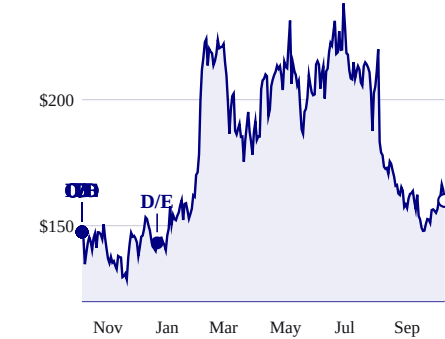


D/E, the sloth

on the D/E 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 Mar 21, 2024, D/E from Feb 21, 2025, D from May 21, 2025, D/E from De

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 20, 2026

Regal Rexnord Corporation (NYSE: RRX) ("we," "us," "our" or the "Company") and its associates around the world help create a better tomorrow by providing sustainable solutions that power, transmit and control motion. The Company's electric motors and air moving subsystems provide the power to create motion. A portfolio of highly engineered power transmission components and subsystems efficiently transmits motion to power industrial applications. The Company's automation offering, comprised of

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Assay RRX, as of Oct 9, 2026, page 1

controllers, drives, precision motors, and actuators, controls motion in applications ranging from factory automation to precision tools used in surgical applications.

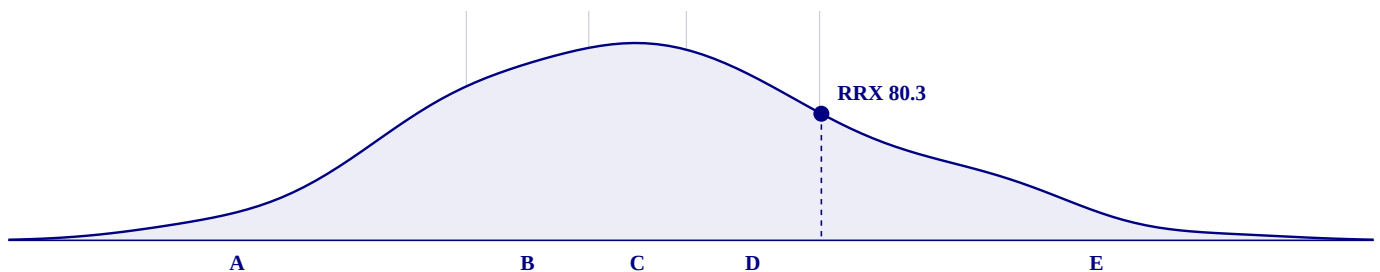
The fourteen inputs

lower percentile is stronger; equal-weighted sleeves

Input	Percentile, 0 to 100	Value	Peer median	Percentile	Peers	Period end
Profitability, sleeve percentile 62.3						
Gross profitability		15.9%	21.9%	69.3	275	2025-12-31
Return on invested capital		4.8%	9.7%	74.7	100	2025-12-31
Accruals ratio		(5.1%)	(3.6%)	39.4	308	2025-12-31
Gross margin stability, five years		3.0 pts	2.1 pts	65.8	229	2025-12-31
Solvency, sleeve percentile 71.7						
Twelve-month failure probability		not computable	0.04%			liabilities and a nearby cover-page share count are required at 2026-06-30
Altman Z double-prime		not computable	3.66			one or more required annual facts are missing
Net debt to EBITDA		5.14x	1.78x	90.8	121	2025-12-31
Interest coverage		not computable	5.09x			latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31
Current ratio		2.15x	2.25x	52.5	325	2025-12-31
Growth and financing, sleeve percentile 45.3						
Revenue growth, three-year compound		4.4%	2.1%	36.9	269	2025-12-31
Free cash flow growth, three-year compound		36.3%	13.9%	19.6	139	2025-12-31
Reinvestment rate		(26.6%)	26.4%	82.6	139	2025-12-31
Asset growth, three years		10.7%	4.4%	24.8	279	2025-12-31
Net share issuance, one year		0.3%	0.01%	62.4	243	2026-02-18

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
200	Otis Worldwide Corp. (OTIS)	78.3	D/E	
201	Silgan Holdings Inc. (SLGN)	78.7	D/E	
202	Mercer International Inc. (MERC)	79.1	D/E	
203	NN Inc. (NNBR)	79.5	D/E	

204	Redwire Corp. (RDW)	79.9	D/E	dilution, fortress balance sheet
205	Regal Rexnord Corp. (RRX) <	80.3	D/E	
206	American Superconductor Corp. (AMSC)	80.7	D/E	
207	Crane NXT, Co. (CXT)	81.1	D/E	
208	Fuelcell Energy Inc. (FCEL)	81.5	D/E	fortress balance sheet
209	Broadwind, Inc. (BWEN)	81.9	D/E	
210	Innovate Corp. (VATE)	82.3	D/E	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	11.1%	13.7%	47
Distance from 52-week high	(32.8%)	(24.3%)	34
EBIT to enterprise value	4.5%	4.1%	53
Free cash flow yield	8.4%	3.4%	86
Book value to price	0.65	0.34	73
Sales to price	0.56	0.54	50
Composite equity issuance, five years	39.2%	(9.5%)	89
Relative strength against the sector, log excess return	(0.03)	(0.00)	47

Diagnostics

not in the grade

Measure	Value
Piotroski F-score 7 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	fail
No new shares issued	fail
Gross margin improved	pass
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	\$441.6M
Operating cash flow, four quarters	\$556.9M
Months of runway	not finite
Days since last periodic filing	65 (10-Q received Aug 5, 2026)
Median daily dollar volume, 63 sessions	\$188.3M

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	\$2.2B	2025-12-31	2026-02-20	10-K	0000082811-26-000054
2	assets	us-gaap:Assets	\$13.9B	2025-12-31	2026-02-20	10-K	0000082811-26-000054
3	operating income	us-gaap:OperatingIncomeLoss	\$680.8M	2025-12-31	2026-02-20	10-K	0000082811-26-000054
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraordinaryItemsUnusualItems	\$352.5M	2025-12-31	2026-02-20	10-K	0000082811-26-000054
5	income tax	us-gaap:IncomeTaxExpenseBenefit	\$71.7M	2025-12-31	2026-02-20	10-K	0000082811-26-000054
6	total debt	us-gaap:LongTermDebt	\$4.8B	2025-12-31	2026-02-20	10-K	0000082811-26-000054
7	book equity	us-gaap:StockholdersEquity	\$6.8B	2025-12-31	2026-02-20	10-K	0000082811-26-000054
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$521.7M	2025-12-31	2026-02-20	10-K	0000082811-26-000054
9	total debt	us-gaap:LongTermDebt	\$5.5B	2024-12-31	2025-02-21	10-K	0000082811-25-000046
10	book equity	us-gaap:StockholdersEquity	\$6.3B	2024-12-31	2026-02-20	10-K	0000082811-26-000054

11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$393.5M	2024-12-31	2026-02-20	10-K	0000082811-26-000054
12	net income	us-gaap:NetIncomeLoss	\$279.5M	2025-12-31	2026-02-20	10-K	0000082811-26-000054
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$990.8M	2025-12-31	2026-02-20	10-K	0000082811-26-000054
14	assets	us-gaap:Assets	\$14.0B	2024-12-31	2026-02-20	10-K	0000082811-26-000054
15	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAssessedTax	\$5.9B	2025-12-31	2026-02-20	10-K	0000082811-26-000054
16	gross profit	us-gaap:GrossProfit	\$2.2B	2024-12-31	2026-02-20	10-K	0000082811-26-000054
17	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAssessedTax	\$6.0B	2024-12-31	2026-02-20	10-K	0000082811-26-000054
18	gross profit	us-gaap:GrossProfit	\$2.1B	2023-12-31	2026-02-20	10-K	0000082811-26-000054
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$6.3B	2023-12-31	2024-02-26	10-K	0000082811-24-000035
20	gross profit	us-gaap:GrossProfit	\$1.7B	2022-12-31	2025-02-21	10-K	0000082811-25-000046
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$5.2B	2022-12-31	2024-02-26	10-K	0000082811-24-000035
22	gross profit	us-gaap:GrossProfit	\$1.1B	2022-01-01	2024-02-26	10-K	0000082811-24-000035
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$3.8B	2022-01-01	2024-02-26	10-K	0000082811-24-000035
24	depreciation amortization	us-gaap:Depreciation	\$154.5M	2025-12-31	2026-02-20	10-K	0000082811-26-000054
25	operating income	us-gaap:OperatingIncomeLoss	\$377.1M	2023-12-31	2026-02-20	10-K	0000082811-26-000054
26	interest expense	us-gaap:InterestExpense	\$431.0M	2023-12-31	2024-02-26	10-K	0000082811-24-000035
27	current assets	us-gaap:AssetsCurrent	\$2.7B	2025-12-31	2026-02-20	10-K	0000082811-26-000054
28	current liabilities	us-gaap:LiabilitiesCurrent	\$1.3B	2025-12-31	2026-02-20	10-K	0000082811-26-000054
29	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$97.7M	2025-12-31	2026-02-20	10-K	0000082811-26-000054
30	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$609.4M	2024-12-31	2026-02-20	10-K	0000082811-26-000054
31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$109.5M	2024-12-31	2026-02-20	10-K	0000082811-26-000054
32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$715.3M	2023-12-31	2026-02-20	10-K	0000082811-26-000054
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$119.1M	2023-12-31	2026-02-20	10-K	0000082811-26-000054
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$436.2M	2022-12-31	2025-02-21	10-K	0000082811-25-000046
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$83.8M	2022-12-31	2025-02-21	10-K	0000082811-25-000046
36	current assets	us-gaap:AssetsCurrent	\$2.8B	2024-12-31	2026-02-20	10-K	0000082811-26-000054
37	current liabilities	us-gaap:LiabilitiesCurrent	\$1.2B	2024-12-31	2026-02-20	10-K	0000082811-26-000054
38	assets	us-gaap:Assets	\$15.4B	2023-12-31	2025-02-21	10-K	0000082811-25-000046
39	assets	us-gaap:Assets	\$10.3B	2022-12-31	2024-02-26	10-K	0000082811-24-000035
40	shares outstanding	dei:EntityCommonStockSharesOutstanding	66,499,582	2026-02-18	2026-02-20	10-K	0000082811-26-000054
41	shares outstanding	dei:EntityCommonStockSharesOutstanding	66,268,365	2025-02-19	2025-02-21	10-K	0000082811-25-000046