

Vontier Corp. (VNT)

NYSE; business equipment; SIC 3824, Totalizing Fluid Meters & Counting Devices; CIK 0001786842

Vontier Corp.					
VNT; business equipment					
Grade	E	A B C D E			
	weakest fifth of 497 graded peers percentile 83.7; sampling error 2.2 points; lower is stronger				
Rank	416 of 497				
Profitability	D		percentile 77.6		
Solvency	C		percentile 55.0		
Growth and financing	C		percentile 52.0		
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: distress				
Inputs computable	8 of 14				
Graded from	filings received through Feb 12, 2026 239 days before the rescans; latest periodic filing 10-Q received Aug 6, 2026				
Last close	\$32.20	2026-10-08; market equity \$4.4B			
Price used in grade	None				

E, the bear

weakest fifth of its sector;
letters are fifths of the 497
graded peers

Share price, twelve months to the rescan

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

Rescans on file: C from Mar 21, 2022, D from Feb 21, 2023, C/D from Apr 21,

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 12, 2026

- General" included in this Annual Report for a discussion of our strategies for delivering long-term shareholder value. We operate through three reportable segments which align to our three operating segments: (i) Mobility Technologies, which provides digitally enabled equipment and solutions to support efficient operations across the mobility ecosystem, including point-of-sale and payment systems, workflow automation solutions, telematics, data analytics, software platform for electric vehicle charging networks, and

integrated solutions for alternative fuel dispensing; (ii) Repair Solutions, which manufactures and distributes aftermarket vehicle repair tools, toolboxes, automotive diagn...

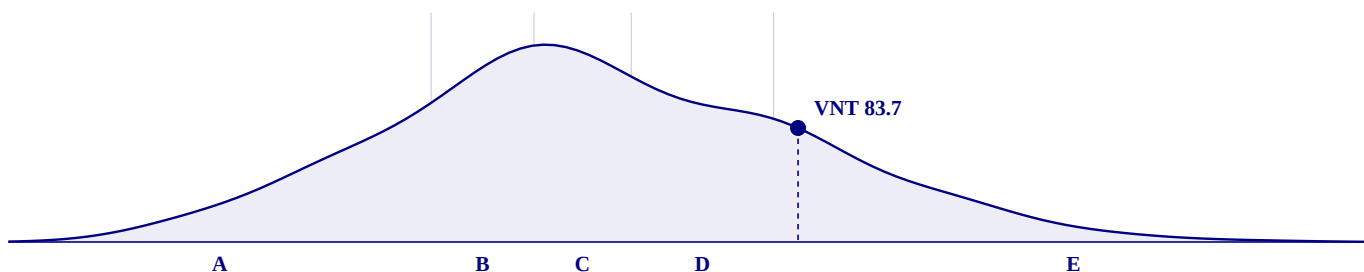
The fourteen inputs

lower percentile is stronger; equal-weighted sleeves

Input	Percentile, 0 to 100	Value	Peer median	Percentile	Peers	Period end
Profitability, sleeve percentile 77.6						
Gross profitability		not computable	28.5%			latest aligned inputs end 2022-12-31; latest annual assets end 2025-12-31
Return on invested capital		not computable	10.9%			latest aligned inputs end 2022-12-31; latest annual assets end 2025-12-31
Accruals ratio		(2.4%)	(7.4%)	77.6	621	2025-12-31
Gross margin stability, five years		not computable	2.4 pts			five annual gross margins are required; found 3
Solvency, sleeve percentile 55.0						
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		3.03	2.18	36.5	566	2025-12-31
Net debt to EBITDA		not computable	1.11x			latest aligned inputs end 2022-12-31; latest annual assets end 2025-12-31
Interest coverage		not computable	3.77x			one or more required annual facts are missing
Current ratio		1.16x	2.02x	73.5	666	2025-12-31
Growth and financing, sleeve percentile 52.0						
Revenue growth, three-year compound		(1.2%)	6.4%	71.3	538	2025-12-31
Free cash flow growth, three-year compound		19.1%	17.2%	47.2	268	2025-12-31
Reinvestment rate		(53.2%)	14.3%	71.1	226	2025-12-31
Asset growth, three years		0.2%	5.0%	61.4	563	2025-12-31
Net share issuance, one year		(4.8%)	0.5%	8.9	407	2026-02-09

Among 497 peers

business equipment; 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
411	NCR Atleos Corp. (NATL)	82.7	E	
412	Microvision, Inc. (MVIS)	82.9	E	short runway, fortress balance sheet
413	ONE Stop Systems, Inc. (OSS)	83.1	E	
414	Synaptics Inc. (SYNA)	83.3	E	
415	Comtech Telecommunications Corp. (CMTL)	83.5	E	late filer
416	Vontier Corp. (VNT) <	83.7	E	
417	Magnite, Inc. (MGNI)	83.9	E	
418	Pacific Biosciences OF California, Inc. (PACB)	84.1	E	
419	Marqeta, Inc. (MQ)	84.3	E	
420	Neonode Inc. (NEON)	84.5	E	
421	Vistance Networks, Inc. (VISN)	84.7	E	

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	(23.1%)	2.2%	28
Distance from 52-week high	(25.5%)	(30.0%)	58
EBIT to enterprise value	8.7%	1.5%	91
Free cash flow yield	10.1%	2.7%	86
Book value to price	0.27	0.23	55
Sales to price	0.71	0.30	71
Composite equity issuance, five years	(23.7%)	3.9%	9
Relative strength against the sector, log excess return	(0.55)	(0.26)	28

Diagnostics

not in the grade

Measure	Value
Piotroski F-score None 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	fail
No new shares issued	pass
Gross margin improved	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	\$265.8M
Operating cash flow, four quarters	\$463.4M
Months of runway	not finite
Days since last periodic filing	64 (10-Q received Aug 6, 2026)

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	2022-12-31	2023-02-17	10-K	0001786842-23-000011
2	assets	us-gaap:Assets	\$4.3B	2022-12-31	2024-02-15	10-K	0001786842-24-000015
3	operating income	us-gaap:OperatingIncomeLoss	\$577.9M	2022-12-31	2025-02-13	10-K	0001786842-25-000008
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraordinaryItemsDeductibleItems	\$577.9M	2022-12-31	2025-02-13	10-K	0001786842-25-000008
5	income tax	us-gaap:IncomeTaxExpenseBenefit	\$126.1M	2022-12-31	2025-02-13	10-K	0001786842-25-000008
6	total debt	us-gaap:LongTermDebt	\$2.6B	2022-12-31	2023-02-17	10-K	0001786842-23-000011
7	book equity	us-gaap:StockholdersEquity	\$576.5M	2022-12-31	2024-02-15	10-K	0001786842-24-000015
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$204.5M	2022-12-31	2024-02-15	10-K	0001786842-24-000015
9	total debt	us-gaap:LongTermDebt	\$2.6B	2021-12-31	2023-02-17	10-K	0001786842-23-000011
10	book equity	us-gaap:StockholdersEquity	\$569.9M	2021-12-31	2023-02-17	10-K	0001786842-23-000011
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$572.6M	2021-12-31	2023-02-17	10-K	0001786842-23-000011
12	net income	us-gaap:ProfitLoss	\$406.1M	2025-12-31	2026-02-12	10-K	0001628280-26-007648
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$511.0M	2025-12-31	2026-02-12	10-K	0001628280-26-007648
14	assets	us-gaap:Assets	\$4.4B	2025-12-31	2026-02-12	10-K	0001628280-26-007648
15	assets	us-gaap:Assets	\$4.3B	2024-12-31	2026-02-12	10-K	0001628280-26-007648
16	current assets	us-gaap:AssetsCurrent	\$1.5B	2025-12-31	2026-02-12	10-K	0001628280-26-007648
17	current liabilities	us-gaap:LiabilitiesCurrent	\$1.3B	2025-12-31	2026-02-12	10-K	0001628280-26-007648
18	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	\$1.9B	2025-12-31	2026-02-12	10-K	0001628280-26-007648
19	operating income	us-gaap:OperatingIncomeLoss	\$561.6M	2025-12-31	2026-02-12	10-K	0001628280-26-007648
20	book equity	us-gaap:StockholdersEquity	\$1.2B	2025-12-31	2026-02-12	10-K	0001628280-26-007648
21	liabilities	us-gaap:Liabilities	\$3.1B	2025-12-31	2026-02-12	10-K	0001628280-26-007648
22	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	\$40.9M	2022-12-31	2025-02-13	10-K	0001786842-25-000008
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$3.1B	2025-12-31	2026-02-12	10-K	0001628280-26-007648
24	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$3.0B	2024-12-31	2026-02-12	10-K	0001628280-26-007648
25	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$3.1B	2023-12-31	2026-02-12	10-K	0001628280-26-007648
26	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$3.2B	2022-12-31	2025-02-13	10-K	0001786842-25-000008
27	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$69.9M	2025-12-31	2026-02-12	10-K	0001628280-26-007648
28	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$427.5M	2024-12-31	2026-02-12	10-K	0001628280-26-007648
29	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$82.7M	2024-12-31	2026-02-12	10-K	0001628280-26-007648
30	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$455.0M	2023-12-31	2026-02-12	10-K	0001628280-26-007648
31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$60.1M	2023-12-31	2026-02-12	10-K	0001628280-26-007648
32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$321.2M	2022-12-31	2025-02-13	10-K	0001786842-25-000008
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$60.0M	2022-12-31	2025-02-13	10-K	0001786842-25-000008
34	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	\$51.1M	2025-12-31	2026-02-12	10-K	0001628280-26-007648
35	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraordinaryItemsDeductibleItems	\$508.2M	2022-12-31	2026-02-12	10-K	0001628280-26-007648
36	income tax	us-gaap:IncomeTaxExpenseBenefit	\$102.1M	2025-12-31	2026-02-12	10-K	0001628280-26-007648
37	current assets	us-gaap:AssetsCurrent	\$1.4B	2024-12-31	2026-02-12	10-K	0001628280-26-007648
38	current liabilities	us-gaap:LiabilitiesCurrent	\$909.2M	2024-12-31	2026-02-12	10-K	0001628280-26-007648
39	assets	us-gaap:Assets	\$4.3B	2023-12-31	2025-02-13	10-K	0001786842-25-000008
40	shares outstanding	dei:EntityCommonStockSharesOutstanding	141,600,000	2026-02-09	2026-02-12	10-K	0001628280-26-007648
41	shares outstanding	dei:EntityCommonStockSharesOutstanding	148,700,000	2025-02-10	2025-02-13	10-K	0001786842-25-000008