

Allegion plc (ALLE)

Industrials / Security & Protection Services · New York Stock Exchange

Generated: 2026-Oct-18 · Market data through: 2026-10-16

LAST CLOSE \$156.54 2026-10-16	MARKET CAP \$13.3B VOLUME 1.1M	52-WK HIGH \$183.11 52-WK LOW \$125.00	TRAILING PE 20.4 P/S 3.10	GROSS MARGIN 44.8% NET MARGIN 15.4%	ROE 32% ROIC 16%	PIOTROSKI 6/9 ALTMAN Z 4.6	1-YR RETURN -11.6% 5-YR RETURN +80.0%
---	---	---	--	--	---	---	--

Allegion plc engages in the provision of security products and solutions worldwide. It is operating through two segments: Allegion Americas and Allegion International. The company offers door controls, door control system, and exit devices; doors, glass and door systems, and accessories; electronic security products and access control systems, including time, attendance, and workforce productivity; and locks, locksets, portable locks, and key systems. It also provides services and software, such as inspection, maintenance, and repair services for its automatic entrance solutions; software as a service, including access control, platform integration, and workforce management solutions; and ongoing aftermarket services, and design and installation offerings. In addition, the company sells its products and solutions to end-users in commercial, institutional, and residential facilities, including education, healthcare, government, hospitality, retail, commercial office, and single and multi-family residential markets under the CISA, Interflex, LCN, Schlage, SimonsVoss, and Von Duprin brands. It sells its products and solutions through distribution and retail channels, such as specialty distribution, e-commerce, and wholesalers, as well as through various retail channels comprising do-it-yourself home improvement centers, online and e-commerce platforms, and small specialty showroom outlets. Allegion plc was incorporated in 2013 and is based in Dublin, Ireland.

SECTOR Industrials INDUSTRY Security & Protection Services EXCHANGE NYSE MARKET CAP \$13.3B EMPLOYEES 13,300 (SEC-filed) CEO John H. Stone
IPO 2013-11-18 COUNTRY IE
Unit No. 233, Dublin, HE D07 X324 · Tel 353 1 6833399 · allegion.com

1 INSIDERSTREET SCORE

INSIDERSTREET SCORE

65 / 100

Street mean \$175.00 (2 analysts, last qtr) — their number, not ours

INSIDER CONSENSUS SIGNAL

TWO-WAY FLOW

\$0.3M buys against \$2.1M sells / 6 mo

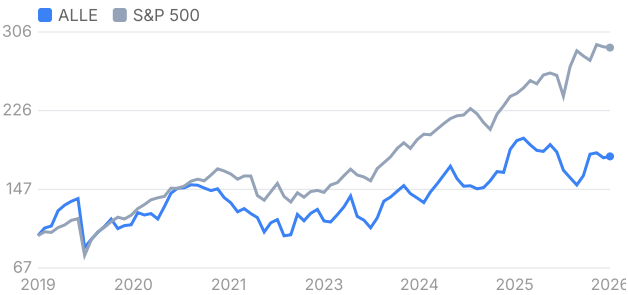
2 PRICE AND VOLUME

adjusted close, prod data layer

1 Year vs S&P 500 · ALLE -11.6% · S&P 500 +15.9% · spread -27.4pp



7 Years vs S&P 500 · ALLE +80.0% · S&P 500 +189.9% · spread -109.9pp



Both charts indexed to 100 at the start of their window and drawn on a single shared scale, so the gap to the benchmark is the gap you see. Adjusted closes throughout.

THIS SPACE INTENTIONALLY LEFT BLANK — THE NEXT SECTION BEGINS ON THE FOLLOWING PAGE

NOT INVESTMENT ADVICE — FOR INFORMATIONAL PURPOSES ONLY

3 INSIDERSTREET SCORE

live IS factor model

INSIDERSTREET
SCORE

65

OF 100

Score Breakdown

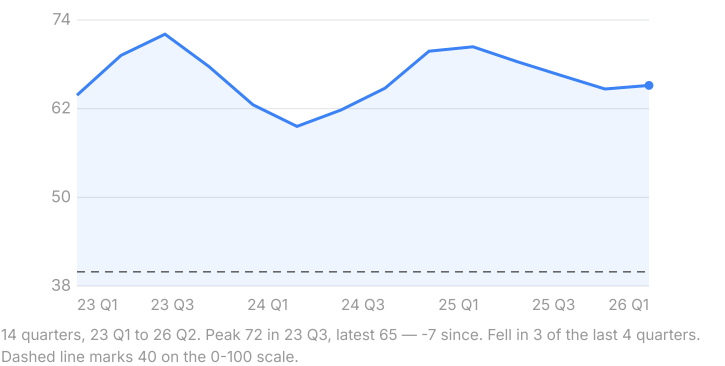
Profitability	72/100
Growth	54/100
Momentum	77/100
Quality	79/100
Earnings Quality	80/100
Balance Sheet	61/100
Value	52/100
Risk (safety)	100/100
Overall	65.5/100

Each component is a diagnostic reading on its own 0-100 scale. The overall score is computed separately from the underlying financials and is **not** the average of the rows above — components are not equally weighted and three of them (Momentum, Value, Risk) are derived partly from price rather than from the business.

Peer Comparison — IS Score

SYMBOL	IS SCORE
MSA	73
ADT	53
BCO	43
BRC	69
GEO	64
CXW	53
ALLE	65

IS Score Trend — quarterly



4 TWO READINGS

business vs price

BUSINESS QUALITY

65 / 100

IS Score 65.5 / 100 · -7.0 from peak of 72

Quarter	Business Quality
23 Q1	64
23 Q2	68
23 Q3	72
23 Q4	65
24 Q1	59
24 Q2	62
24 Q3	68
24 Q4	70
25 Q1	68
25 Q2	65
25 Q3	64
25 Q4	63
26 Q1	65

Fundamental factor model, quarterly. Measures how the business is doing - not where the price is going.

PRICE STRUCTURE

BULLISH

Technical Score 75 / 100 · Power +50 · 20 of 22 indicator votes bullish

Date	Price Structure
07-23	95%
08-13	95%
08-23	41%
09-03	35%
09-13	38%
09-25	68%
10-05	45%
10-16	82%

Vote share across trend, momentum, volume, volatility and pattern families. Describes where the price is, not where it is going.

Both readings sit above the midpoint — business quality at 65 and price structure at 75 out of 100 — so they are not in conflict. The fundamentals and the tape are saying the same thing, which is the case in which either one alone would have been enough.

5 WHAT WOULD CHANGE OUR MIND

falsifiable - check us next quarter

TRIGGER	WHERE IT STANDS NOW	WHAT IT WOULD MEAN
IS Score reaches 75 and holds two consecutive quarters	now 65.5	would move us up one band
IS Score stops falling - one quarter higher than the prior	last four: 69 → 67 → 65 → 65	the direction matters more than the level
Technical vote share back above 50%	now 82%	price structure no longer broken
Institutional holder count rises two quarters running	peak 799 → now 734	fewer institutions willing to hold is our clearest warning

We publish these so the view can be shown to be wrong. If none of them move and our reading does, we owe you an explanation.

NOT INVESTMENT ADVICE — FOR INFORMATIONAL PURPOSES ONLY

This page is InsiderStreet's own reading, produced from the data in the rest of this document. It is not a price target and not investment advice. Analyst consensus and street price targets appear later under their own heading and are the street's numbers, not ours.

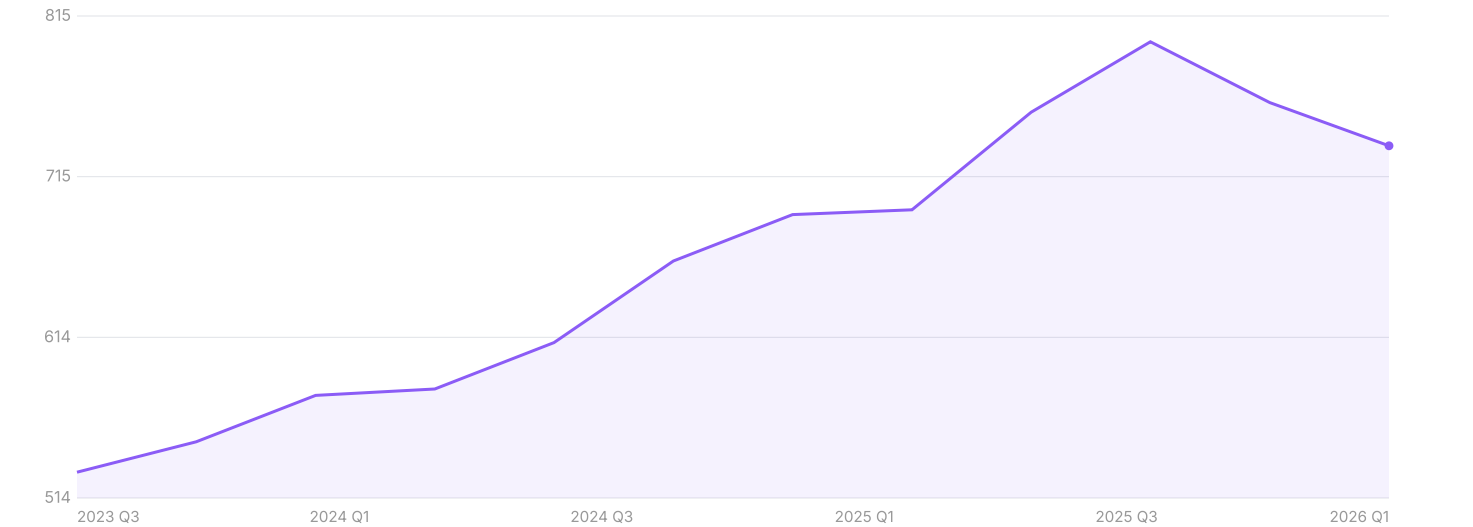
6 SMART MONEY CONFLUENCE EDGE · disclosure sources

SITE CONVERGENCE SCORE 3 of 4 top 4% of 29,420 symbols	SOURCES ALIGNED — of 3 independent disclosures	CONGRESS (180D) 0 buys none disclosed	INSIDER BUYS (180D) 1 \$0.03M
ETF FUNDS (30D) 293 up / 251 down net +42 funds	INSTITUTIONS ADDED (13F) -27 managers opening or increasing		

Congressional and insider figures are disclosed purchases in the trailing 180 days; ETF figures are COUNTS OF FUNDS whose holding changed in 30 days, not dollars. Coincidence of separate disclosures, not coordination. An absent source means nothing qualifying was disclosed in its window.

7 INSTITUTIONAL OWNERSHIP - 12-QUARTER TREND 13F · filed 45 days after quarter end

Institutions holding — 12 quarters



Peak 799 · latest 734 (-65 from peak).

QUARTER	HOLDERS	13F SHARES	VALUE	REPORTED OWN%	GUARD
2026 Q2	734	87.0M	\$11.9B	101.5%	ex-outlier 93.5%
2026 Q1	761	83.6M	\$11.9B	97.6%	
2025 Q4	799	82.2M	\$12.8B	95.9%	
2025 Q3	755	81.9M	\$14.1B	95.5%	
2025 Q2	694	83.1M	\$11.5B	97.0%	
2025 Q1	691	83.6M	\$10.4B	97.6%	
2024 Q4	662	82.4M	\$10.4B	96.2%	
2024 Q3	611	82.0M	\$11.3B	95.6%	
2024 Q2	582	82.0M	\$9.2B	95.7%	
2024 Q1	578	82.8M	\$10.6B	96.6%	
2023 Q4	549	84.4M	\$10.2B	98.5%	
2023 Q3	530	81.7M	\$8.5B	95.3%	

How to read ownership above 100%. A 13F reports the positions a manager has investment discretion over, and where two or more managers share discretion over the same block, each one reports it. Summed across filers, the total can therefore exceed the shares actually outstanding without anything being wrong. We publish the figure as filed rather than netting it down, and flag separately any quarter where the arithmetic is not merely high but impossible.

Why 2026-06 reads 101.48%. Institutions cannot hold more of a company than exists. The reported 87.0M shares exceed the 85.7M outstanding, and a single filer accounts for the excess: BlackRock, Inc. reports 6,806,953 shares against 6,617,855 the prior quarter, a 1x jump, which alone would be 7.9% of the company. Excluding that filing, ownership is 93.5%. We publish both figures. 13F filings are due 45 days after quarter end and amendments keep arriving after that, so the newest quarter is provisional by construction - this is what an unsettled quarter looks like.

NOT INVESTMENT ADVICE — FOR INFORMATIONAL PURPOSES ONLY

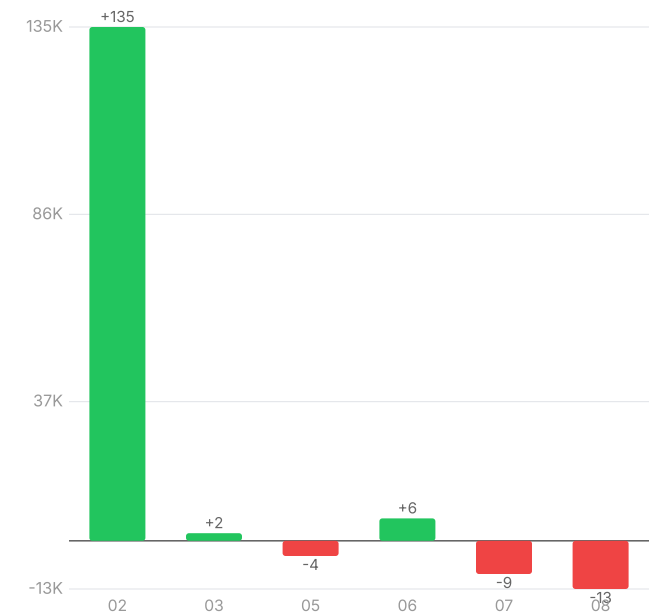
8 INSIDER ACTIVITY live Form 4 data

INSIDER	ROLE	DATE	TYPE	SHARES	VALUE	POST-TXN OWNED
Mizell Steven	director	2026-08-28	BUY	170	\$0.03M	5,899
Eckersley Timothy P	President -Intl & SVP-Allegion	2026-08-19	GIFT	1,527	—	28,392
Eckersley Timothy P	President -Intl & SVP-Allegion	2026-08-19	GIFT	1,527	—	1,527
Ilardi David S.	President -Amer & SVP-Allegion	2026-08-18	EXERCISE	549	\$0.04M	14,301
Ilardi David S.	President -Amer & SVP-Allegion	2026-08-18	SELL	549	\$0.09M	13,752
Ilardi David S.	President -Amer & SVP-Allegion	2026-08-18	EXERCISE	549	\$0.04M	0
Wenos Vincent	SVP - Chief Technology Officer	2026-08-06	SELL	1,000	\$0.17M	12,096
Stone John H	director, President and CEO	2026-08-01	TAX W/H	11,292	\$1.77M	136,161

9 SELL DECOMPOSITION — ROUTINE VS. DISCRETIONARY EDGE

6-MO DECOMPOSITION (FORM 4)	TXNS	SHARES	VALUE	SIGNAL WEIGHT
S — Open-market sales	6	14,114	\$2.1M	Counted
P — Open-market purchases	4	2,170	\$0.3M	Counted
M — Exercises (paired A/D)	4	4,420	\$0.3M	None — mechanics
F — Tax withholding	9	13,638	\$2.1M	None — compensation
G — Gifts	1	1,527	—	None

Monthly Net Insider Flow (000 shares)



Net of acquisitions minus dispositions, all Form 4 types.

Signal Summary

SIGNAL Two-Way Flow	OPEN-MARKET SELLS \$2.1M 6 txns / 6 mo	OPEN-MARKET BUYS \$0.3M 4 txns / 6 mo	CLUSTER None active 3+ insiders / 21 days
-------------------------------	--	---	--

10 FORM 144 PLANNED-SALE PIPELINE live EDGAR data

FILED	FILER	SHARES REGISTERED	EST. PROCEEDS
2026-08-18	Ilardi David S.	549	\$0.1M
2026-08-06	Vincent Wenos	1,000	\$0.2M
2026-07-27	Timothy Eckersley	6,417	\$1.0M
2026-07-23	Wagnes Michael J.	3,184	\$0.5M
Trailing 12 mo	8 filings	17,230	\$3M

NOT INVESTMENT ADVICE — FOR INFORMATIONAL PURPOSES ONLY

11 13D / 13G STAKESCOND

FILED	FORM	REPORTING PERSON	% OF CLASS	SHARES
2026-08-07	SCHEDULE 13G	STATE STREET CORPORATION	5.10%	4.3M sh
2026-08-03	SCHEDULE 13G/A	Boston Partners	5.18%	4.5M sh
2026-05-14	SCHEDULE 13G/A	Boston Partners	4.95%	4.3M sh
2026-04-28	SCHEDULE 13G	Vanguard Capital Management	7.50%	6.5M sh

12 CONGRESSIONAL TRADINGEDGE · STOCK Act

MEMBER	CHAMBER	TRADE	SIZE BAND	TRADED	DISCLOSED
Lisa McClain	House	SELL	\$1,001 - \$15,000	2025-10-31	2025-11-24
Lisa C. McClain	House	SELL	\$1,001 - \$15,000	2025-10-31	2025-11-24
Lisa McClain	House	BUY	\$1,001 - \$15,000	2025-10-30	2025-11-24
Tommy Tuberville	Senate	SELL	\$1,001 - \$15,000	2023-04-03	2023-05-12
Tommy Tuberville	Senate	SELL	\$1,001 - \$15,000	2023-04-03	2023-05-11
Tommy Tuberville	Senate	SELL	\$1,001 - \$15,000	2023-04-03	2023-05-11

HOUSE 12-MO 8 trades 3 purchases	SENATE 12-MO 0 trades None purchases	COVERAGE STOCK Act filings 30-45 day disclosure lag	
--	--	---	--

13 INSTITUTIONAL OWNERSHIP & 13F FLOWlive 13F data

13F FILERS (LAST COMPLETE Q) 761	13F SHARES 84M 97.6% of shares out	NEW / CLOSED 87 / 111 positions, QoQ	INCREASED / REDUCED 266 / 269 positions, QoQ
PUT/CALL (13F) 1.25 option positions	FREE FLOAT 99.5% 85M sh		

2.8 · Largest Reporting 13F Managers

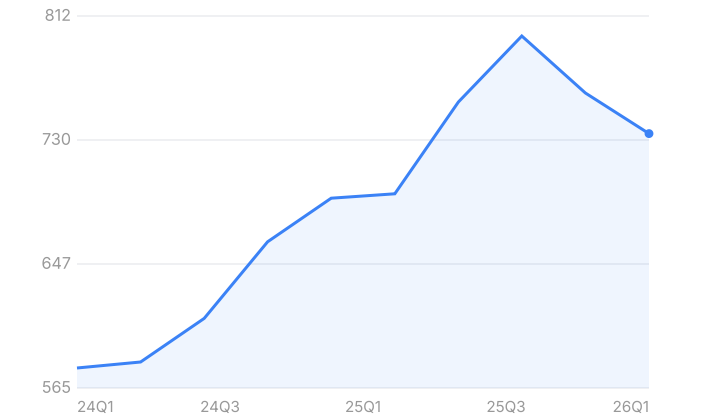
MANAGER	SHARES	VALUE
Vontobel Holding Ltd.	234,504	\$36M
Ninety One North America, Inc.	72,211	\$11M
Wealth Enhancement Advisory Serv	56,126	\$8M
Y-Intercept	41,751	\$6M
Ghp Investment Advisors, Inc.	32,045	\$5M
Assenagon Asset Management S.A.	30,423	\$5M

EDGAR 13F holdings as of 2026-09-30; filer values normalized to dollars.

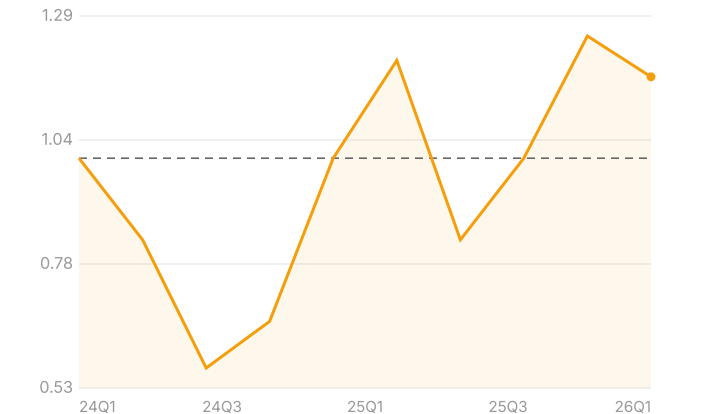
2.9 · Top ETF & Fund Ownership

FUND	WEIGHT	POSITION
VITSX	0.0%	\$414M
VTI	0.0%	\$414M
VTSAX	0.0%	\$414M
VSMPX	0.0%	\$414M
VFFSX	0.0%	\$343M
VFIAX	0.0%	\$343M

13F Filers Holding ALLE — quarterly



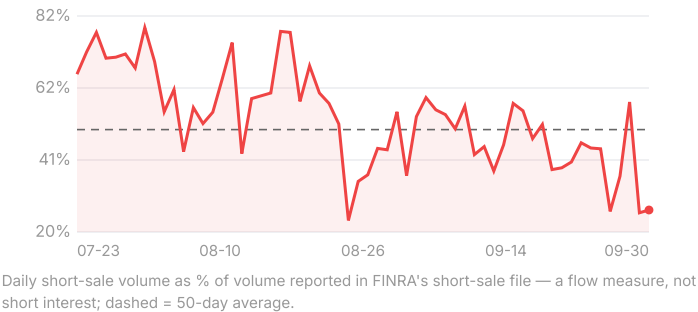
Institutional Put/Call — quarterly



NOT INVESTMENT ADVICE — FOR INFORMATIONAL PURPOSES ONLY

14 SHORT VOLUME — DAILY, 60 SESSIONS

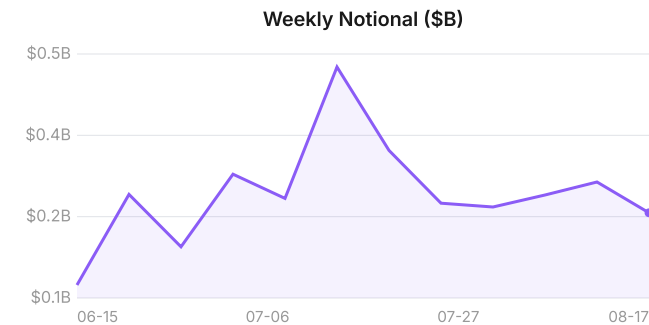
EDGE · live FINRA feed



LATEST SESSION 26.7% 2026-10-15	20-DAY AVG 43.2% 50-day 49.8%	TREND Falling 20d vs 50d	BY MARKET CENTER Q: 26% · N: 42% · B: 12% latest session
---------------------------------------	-------------------------------------	--------------------------------	--

15 DARK POOL ACTIVITY

EDGE · live ATS data

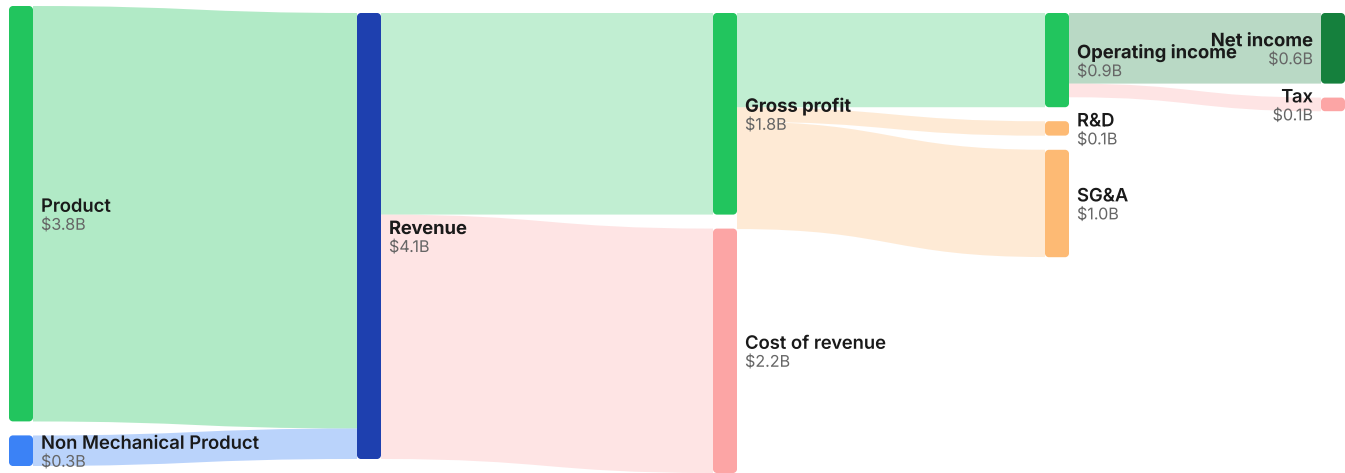


Where ALLE Trades in the Dark

ATS VENUE (4-WK)	SHARES	AVG TRADE
Ubsa Ubs Ats	1.1M	45 sh
Sgmt Sigma X2	0.9M	32 sh
Mspl Ms Pool (Ats- 4)	0.7M	145 sh
Mlix Instinct X	0.6M	48 sh
Ebxi Level Ats	0.6M	19 sh
Incr Intelligent Cross Llc	0.4M	29 sh

16 REVENUE FLOW — FY2025

live segmentation + income data



Where a dollar of Allegion plc revenue goes. All values FY2025 filings, live.

17 GEOGRAPHIC REVENUE

live segmentation

REGION	REVENUE	SHARE
Americas	\$3.0B	75%
Allegion International	\$1.0B	25%

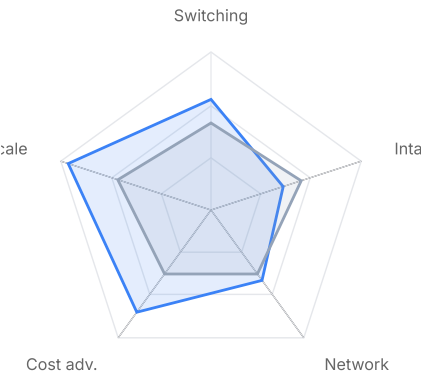
THIS SPACE INTENTIONALLY LEFT BLANK — THE NEXT SECTION BEGINS ON THE FOLLOWING PAGE

NOT INVESTMENT ADVICE — FOR INFORMATIONAL PURPOSES ONLY

18 MOAT & COMPETITIVE POSITION

LIVE MODEL · 68/100 NARROW

Moat score 68/100 — Narrow; primary source Efficient Scale.



ALLE (live moat model) Peer median: MSA · ADT · BCO · BRC · GEO
Component scores from the live moat model. Peer median illustrative.

3.8 · Employees (SEC filings)



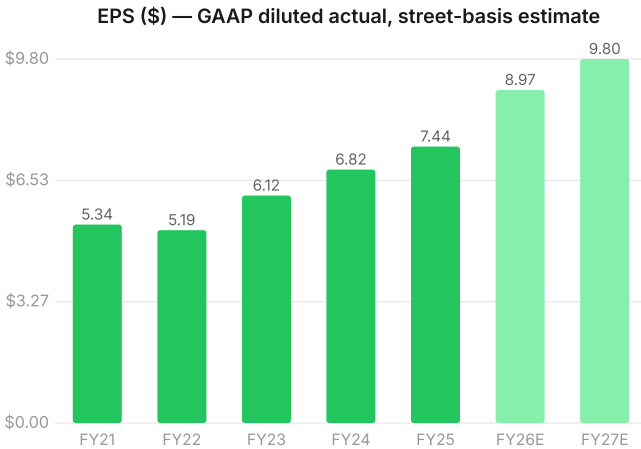
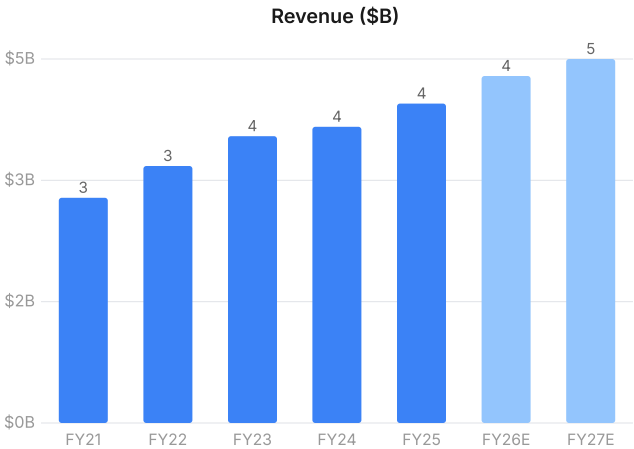
19 CORPORATE INFORMATION — KEY OFFICERS

13,300 employees

OFFICER	TITLE
John H. Stone	President, Chief Executive Officer & Director
Michael Wagnes	Senior Vice President & Chief Financial Officer
Joseph C. Blasko BSFS	Senior Vice President & General Counsel
Timothy Eckersley	SVP & President of International

20 REVENUE & EPS — HISTORY AND ESTIMATES

live consensus

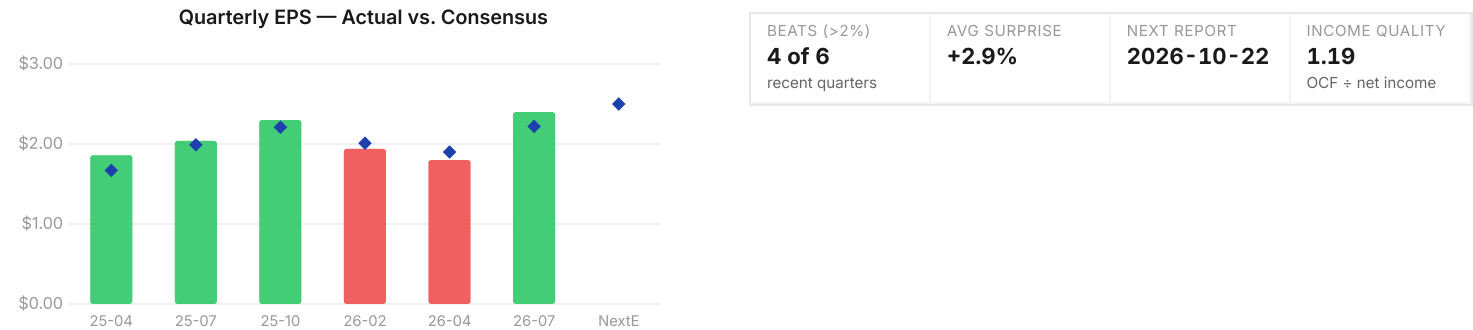


Actual bars are GAAP diluted EPS from the filed income statement; the lighter forward bars are street-basis consensus. The two are different measures and are not comparable quarter to quarter.

NOT INVESTMENT ADVICE — FOR INFORMATIONAL PURPOSES ONLY

21 ESTIMATE VS. ACTUAL & SURPRISES

live data



22 REPORTED VS. CONSENSUS — FULL HISTORY

0 quarters · live data

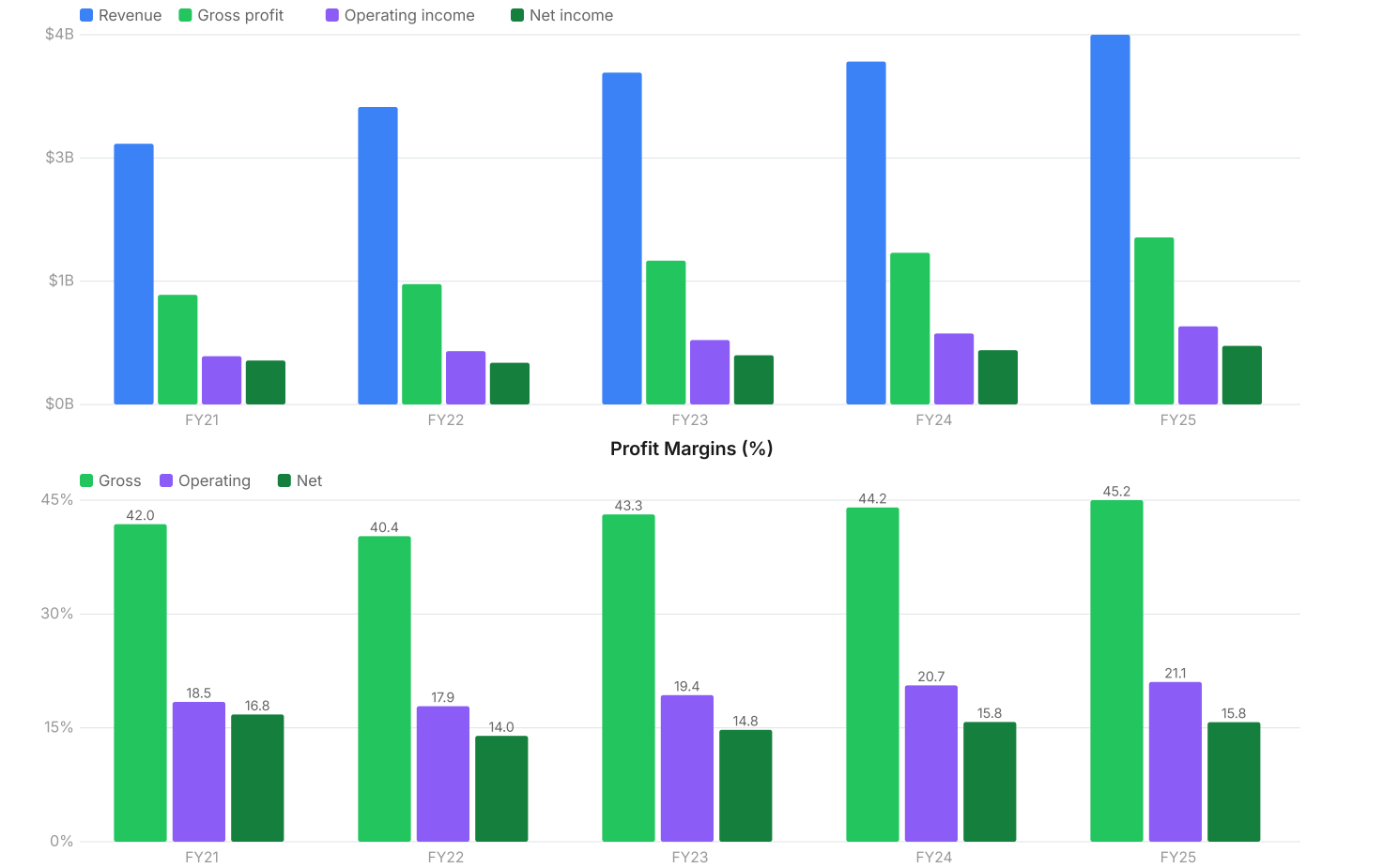
BEAT RATE —% 0 of 0 quarters	CURRENT STREAK 0 longest 0	AVG EPS SURPRISE —% median —%	SURPRISE TREND — last 4 vs prior 4
------------------------------------	----------------------------------	-------------------------------------	--

PERIOD	EPS EST.	EPS ACTUAL	EPS SURPRISE	REV EST. (\$M)	REV ACTUAL (\$M)	REV SURPRISE
--------	----------	------------	--------------	----------------	------------------	--------------

Announcement dates to . Consensus as it stood at each report. Revenue surprise shown where both estimate and actual are filed. A beat record is history, not a forecast.

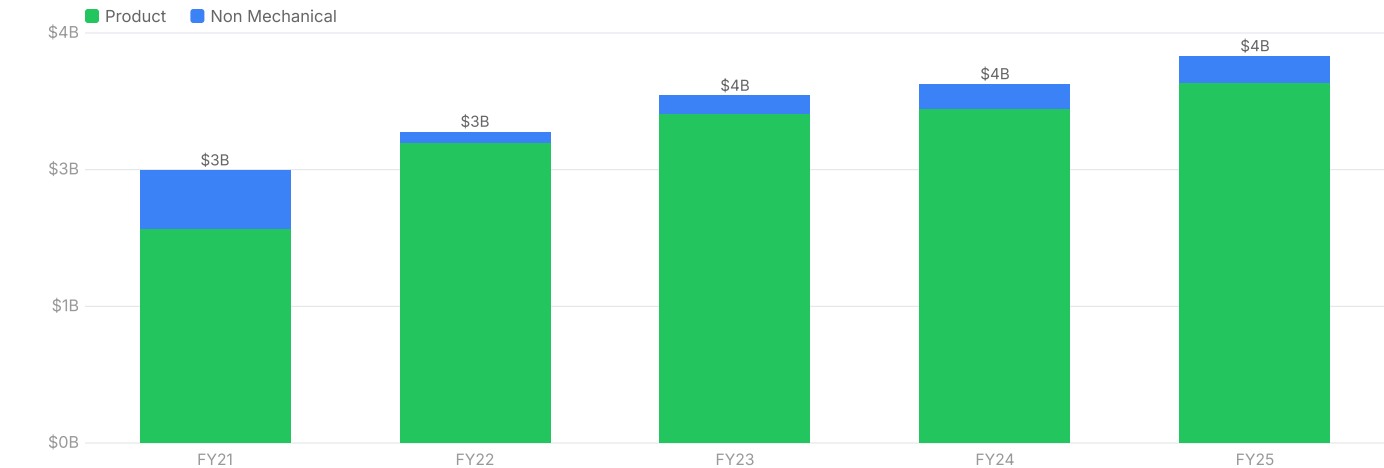
INCOME TRENDS — 5 YEAR

live financials



NOT INVESTMENT ADVICE — FOR INFORMATIONAL PURPOSES ONLY

Revenue by Segment — Stacked



YoY Growth Heatmap — Income Lines

YOY GROWTH	FY21	FY22	FY23	FY24	FY25
Revenue	+5.4%	+14.1%	+11.6%	+3.3%	+7.8%
Gross profit	+2.2%	+9.8%	+19.6%	+5.5%	+10.2%
Operating income	+31.4%	+10.6%	+20.8%	+10.2%	+10.1%
Net income	+53.7%	-5.2%	+18.0%	+10.6%	+7.7%

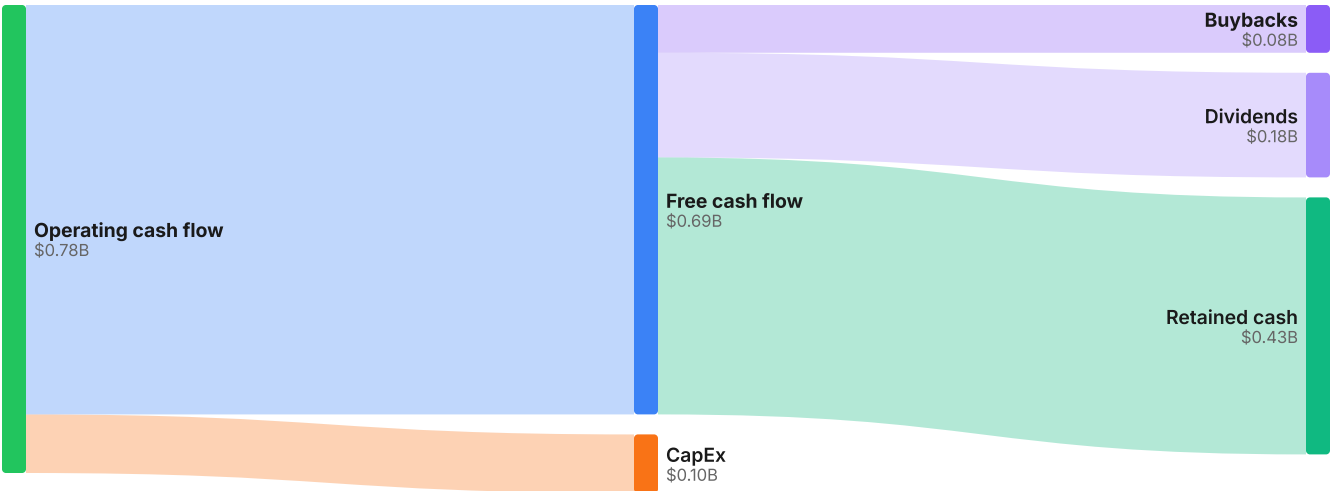
23 INCOME STATEMENT — FULL						live financials
\$B · FY ENDS	FY21	FY22	FY23	FY24	FY25	TREND
Revenue	2.9	3.3	3.7	3.8	4.1	
Cost of revenue	1.7	1.9	2.1	2.1	2.2	
Gross profit	1.2	1.3	1.6	1.7	1.8	
R&D expense	0.0	0.0	0.0	0.1	0.1	
SG&A expense	0.7	0.7	0.9	0.9	1.0	
Operating income	0.5	0.6	0.7	0.8	0.9	
EBITDA	0.7	0.7	0.8	0.9	1.0	
D&A	0.1	0.1	0.1	0.1	0.1	
Pretax income	0.5	0.5	0.6	0.7	0.8	
Income tax	0.0	0.1	0.1	0.1	0.1	
Net income	0.5	0.5	0.5	0.6	0.6	
Diluted EPS (\$)	5.34	5.19	6.12	6.82	7.44	
Diluted shares (M)	90	88	88	88	86	

CASH FLOW TRENDS						live data
OPERATING CF	CAPEX	FREE CASH FLOW	SBC	BUYBACKS	NET CASH CHANGE	
\$1B	\$0B	\$1B	\$0B	\$0B	\$-0B	

NOT INVESTMENT ADVICE — FOR INFORMATIONAL PURPOSES ONLY

WHERE THE CASH WENT — FY2025

cash Sankey, live data



Balance Sheet — Full

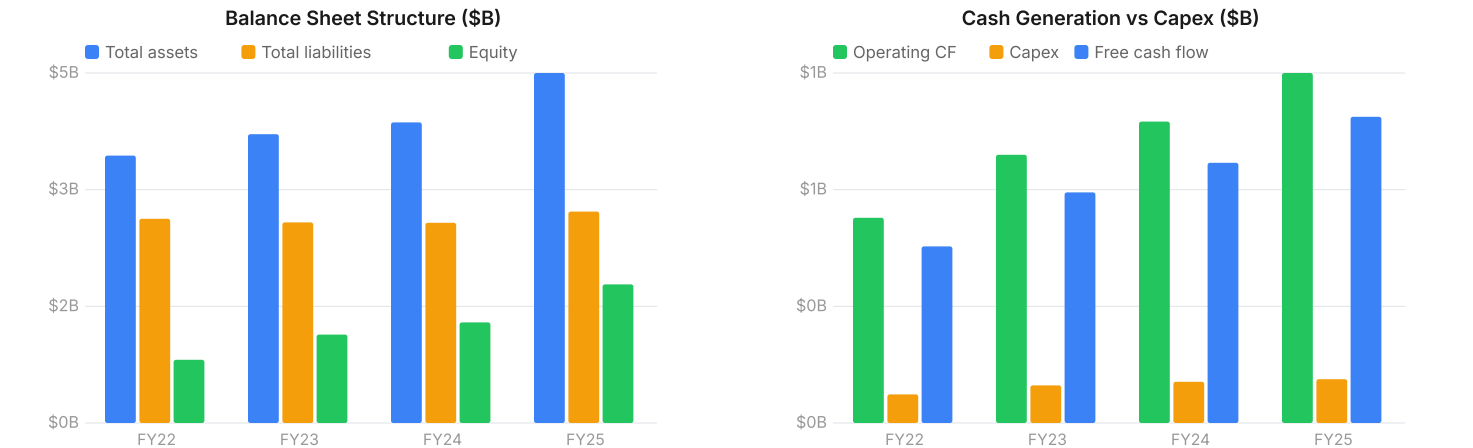
\$B	FY22	FY23	FY24	FY25	
Cash & equivalents	0.3	0.5	0.5	0.4	
ST investments	0.0	0.0	0.0	0.0	
Receivables (net)	0.4	0.4	0.4	0.5	
Total current assets	1.2	1.4	1.4	1.4	
PP&E (net)	0.3	0.4	0.4	0.6	
Goodwill + intangibles	2.0	2.0	2.1	2.7	
Total assets	4.0	4.3	4.5	5.2	
Accounts payable	0.3	0.3	0.3	0.2	
Short-term debt	0.0	0.4	0.0	0.0	
Deferred revenue	0.0	0.0	0.0	0.0	
Total current liabilities	0.7	1.1	0.7	0.8	
Long-term debt	2.1	1.6	2.0	2.1	
Total liabilities	3.0	3.0	3.0	3.2	
Shareholders' equity	0.9	1.3	1.5	2.1	

Cash Flow Statement — Full

\$B	FY22	FY23	FY24	FY25	
Net income	0.5	0.5	0.6	0.6	
D&A	0.1	0.1	0.1	0.1	
Stock-based compensation	0.0	0.0	0.0	0.0	
Working capital change	(0.1)	(0.0)	(0.0)	0.0	
Operating cash flow	0.5	0.6	0.7	0.8	
Capital expenditures	(0.1)	(0.1)	(0.1)	(0.1)	
Investing cash flow	(1.0)	(0.1)	(0.2)	(0.7)	
Buybacks	(0.1)	(0.1)	(0.2)	(0.1)	
Dividends paid	(0.1)	(0.2)	(0.2)	(0.2)	
Debt issuance / (repay)	0.7	(0.1)	(0.0)	(0.1)	
Financing cash flow	0.4	(0.3)	(0.4)	(0.3)	
Free cash flow	0.4	0.5	0.6	0.7	

THIS SPACE INTENTIONALLY LEFT BLANK — THE NEXT SECTION BEGINS ON THE FOLLOWING PAGE

NOT INVESTMENT ADVICE — FOR INFORMATIONAL PURPOSES ONLY



24 EXPANDED RATIO ANALYSIS (I)

live ratio engine · profitability · valuation

RATIO	FY21	FY22	FY23	FY24	FY25	TTM	TREND
PROFITABILITY							
ROE	60.8%	53.9%	47.8%	42.4%	36.1%	32%	
ROA	15.8%	13.0%	13.0%	13.6%	13.3%	12.3%	
ROIC	27.1%	19.0%	21.7%	21.2%	18.0%	16.2%	
Gross margin	42.0%	40.4%	43.3%	44.2%	45.2%	44.8%	
Operating margin	18.5%	17.9%	19.4%	20.7%	21.1%	20.8%	
Net margin	16.8%	14.0%	14.8%	15.8%	15.8%	15.4%	
EBITDA margin	22.9%	21.0%	22.5%	24.3%	24.3%	24.1%	
FCF margin	15.5%	12.1%	14.1%	15.4%	17.4%	—	
VALUATION							
P/E	23.15	19.41	20.10	18.81	21.39	20.4	
P/B	14.73	9.44	8.24	7.49	6.66	6.3	
P/S	3.90	2.72	2.97	2.98	3.39	3.10	
P/FCF	25.23	22.48	21.03	19.30	19.48	19.5	
EV/EBITDA	18.60	15.54	15.10	14.01	15.71	14.5	
EV/Revenue	4.26	3.27	3.40	3.42	3.86	3.5	
Earnings yield	4.3%	5.2%	5.0%	5.3%	4.7%	4.91%	
FCF yield	4.0%	4.4%	4.8%	5.2%	5.1%	5.12%	

EXPANDED RATIO ANALYSIS (II)

leverage · solvency

RATIO	FY21	FY22	FY23	FY24	FY25	TTM	TREND
LEVERAGE & SOLVENCY							
Current ratio	1.86	1.73	1.26	2.04	1.84	1.93	
Quick ratio	1.23	1.05	0.85	1.43	1.16	1.23	
Debt / equity	1.90	2.22	1.53	1.43	1.10	0.96	
Debt / assets	47.3%	52.5%	46.7%	47.9%	43.6%	37.9%	
Net debt / EBITDA	1.59	2.62	1.88	1.79	1.92	1.65	
Interest coverage	11.44	7.78	7.63	7.85	8.61	—	

NOT INVESTMENT ADVICE — FOR INFORMATIONAL PURPOSES ONLY

EXPANDED RATIO ANALYSIS (III)							efficiency · growth · per-share · scores
RATIO	FY21	FY22	FY23	FY24	FY25	TTM	TREND
EFFICIENCY							
Asset turnover	0.94	0.93	0.88	0.86	0.84	0.80	
Receivables turnover	9.48	9.64	9.03	9.07	9.50	7.7	
DSO (days)	39	38	40	40	38	48	
DPO (days)	53	51	48	45	41	43	
Cash conversion cycle	59	68	74	70	74	88	
GROWTH (YoY)							
Revenue growth	5.4%	14.1%	11.6%	3.3%	7.8%	—	
Net income growth	53.7%	-5.2%	18.0%	10.6%	7.7%	—	
EPS growth	56.2%	-3.7%	18.1%	11.8%	8.6%	—	
FCF growth	0.0%	-10.8%	30.6%	12.7%	21.5%	—	
PER SHARE (\$)							
EPS (diluted, TTM)	5.38	5.19	6.13	6.85	7.44	7.68	
Book value / share	8.46	10.67	14.95	17.21	23.90	24.72	
Revenue / share	31.97	37.05	41.39	43.26	47.02	50.04	
FCF / share	4.94	4.48	5.85	6.68	8.18	7.96	
Cash / share	4.44	3.26	5.31	5.78	4.12	3.74	
SHAREHOLDER RETURN & SCORES							
Buyback yield	3.7%	0.7%	0.6%	2.0%	0.6%	0.00%	
Altman Z-Score	5.13	3.64	4.16	4.45	4.69	4.6	
Piotroski F-Score	6	5	8	8	6	6/9	
Beneish M-Score	-2.62	-1.99	-2.54	-2.51	-2.53	-2.35	

25 EARNINGS QUALITY PANEL				live scores
MODEL	SCORE	ZONE	NOTE	
Piotroski F-Score	6 / 9	Middling		
Altman Z-Score	4.6	Safe (>2.99)	Safe	
Income quality	1.19	Cash-backed	OCF ÷ net income	
Beneish M-Score	-2.35	Non-manipulator	vs -2.22 threshold	

26 DUPONT & GROWTH QUALITY				live analysis engine
DUPONT DECOMPOSITION (TTM)		VALUE	GROWTH QUALITY (LIVE)	VALUE
Tax burden		0.83	Revenue stability	0.96
Interest burden		0.89	Earnings stability	0.95
Operating margin		20.8%	Earnings persistence	0.98
Asset turnover		0.83×	Revenue CAGR 3y	5.9%
Financial leverage		2.63×	EPS CAGR 3y	9.5%
= ROE		34%	FCF CAGR 3y	10.8%

THIS SPACE INTENTIONALLY LEFT BLANK — THE NEXT SECTION BEGINS ON THE FOLLOWING PAGE

NOT INVESTMENT ADVICE — FOR INFORMATIONAL PURPOSES ONLY

SHAREHOLDER RETURN PROFILE				live
BUYBACK YIELD	DIVIDEND YIELD	TOTAL SHAREHOLDER RETURN	SBC / REVENUE	
0.00%	1.38%	1.32%	0.0%	
		cash yield	dilution pressure	



28 PEER COMPARISON							live peer engine
COMPANY	MKT CAP	P/E	ROE	NET MARGIN	REV GROWTH	PIOTROSKI	1-YR RET
MSA	\$6.9B	22.2	24%	17.1%	+6.5%	9/9	+8.9%
ADT	\$5.0B	8.9	17%	12.3%	+2.1%	9/9	-19.0%
BCO	\$4.3B	24.0	64%	3.2%	+8.1%	9/9	-5.3%
BRC	\$3.8B	18.9	16%	10.4%	+9.8%	9/9	+9.2%
GEO	\$3.8B	13.4	20%	6.5%	+15.3%	8/9	—
CXW	\$3.0B	24.9	9%	5.4%	+24.3%	6/9	—
MLI	\$13.3B	15.4	26%	17.5%	+14.8%	5/9	—
GGG	\$13.3B	25.4	21%	24.5%	+4.6%	8/9	—

1-yr returns computed from adjusted price history; peers without a tracked series show —.

29 ANALYST CONSENSUS & ESTIMATES						live consensus
Hold 23 Analysts Str Sell (0) Sell (0) Hold (15) Buy (8) Str Buy (0) MEAN TARGET (QTR) \$175.00 2 targets TARGET VS. PRICE +11.8% last-quarter mean NEXT REPORT 2026-10-22 street \$2.50	CONSENSUS ESTIMATES	REVENUE MEAN	HIGH / LOW	EPS MEAN	HIGH / LOW	# EPS EST.
	FY2026	\$4.42B	\$4.46B / \$4.38B	\$8.97	\$9.03 / \$8.89	7
	FY2027	\$4.63B	\$4.75B / \$4.48B	\$9.80	\$10.03 / \$9.47	7
	FY2028	\$4.86B	\$4.92B / \$4.75B	\$10.74	\$11.09 / \$10.47	4

NOT INVESTMENT ADVICE — FOR INFORMATIONAL PURPOSES ONLY

30 STREET TARGETS & THIRD-PARTY RATING

live targets + composite

Street Price Target — Trajectory

WINDOW	AVG TARGET	VS. PRICE	# TARGETS
Last Month	\$180.00	+15.0%	1
Last Quarter	\$175.00	+11.8%	2
Last Year	\$171.17	+9.3%	6
All Time	\$146.06	-6.7%	16

Rolling mean of published targets vs. last close \$156.54. Aggregated from StreetInsider, Pulse 2.0, Benzinga.

Third-Party Composite Rating

B+

DCF4/5

ROE5/5

ROA5/5

DEBT/EQ1/5

P/E3/5

P/B1/5

Independent quant composite as of 2026-10-16; components scored 1-5 (5 best). Shown for contrast with the InsiderStreet Score — methodologies differ.

31 PRICE PERFORMANCE — INDEXED, 12 MO

live prices · benchmark + sector + peer set



All series indexed to 100 at the start of the window, adjusted closes.

NOT INVESTMENT ADVICE — FOR INFORMATIONAL PURPOSES ONLY

TECHNICAL CHART — 6-MONTH DAILY CANDLES, INDICATORS ON

site chart, print edition



Candlesticks with SMA 20/50 overlay, Bollinger (20,2σ) band, volume, and Wilder RSI(14) — computed from live daily OHLCV.

MOVING AVERAGE RIBBON & TREND

site technicals-tab chart, live indicator history



MOVING AVERAGE	VALUE	DISTANCE	% DISTANCE	SIGNAL
SMA 20	\$153.23	+3.31	+2.16%	Above
SMA 50	\$156.50	+0.04	+0.03%	Above
SMA 200	\$149.80	+6.74	+4.50%	Above
EMA 9	\$153.53	+3.01	+1.96%	Above
EMA 21	\$153.50	+3.04	+1.98%	Above
EMA 50	\$153.33	+3.21	+2.09%	Above
EMA 200	\$150.65	+5.89	+3.91%	Above

Series and readings from the nightly technical-indicator history — identical data to the site's ribbon chart. Supertrend segments colored by direction.

NOT INVESTMENT ADVICE — FOR INFORMATIONAL PURPOSES ONLY

32 TECHNICAL POWER SCORE

EDGE · site engine · 75/100 composite

TECHNICAL VERDICT

BULLISH

Power Score +50

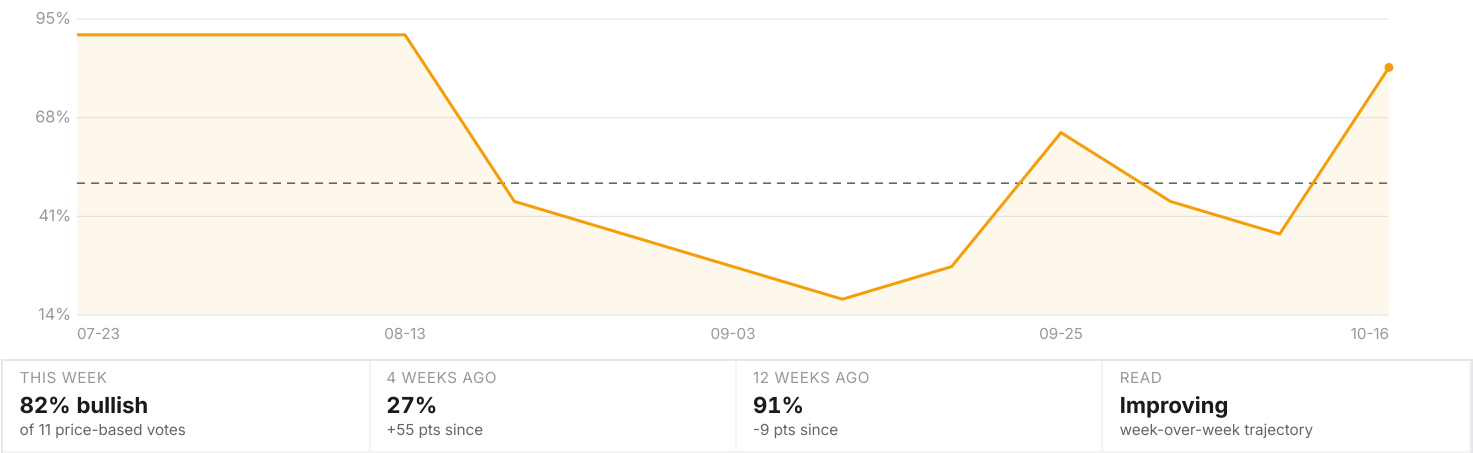
20 of 22 indicator votes bullish

Family Scores (site weights)

Trend 30%		78
Momentum 25%		91
Volume 20%		81
Volatility 10%		50
Patterns 15%		50

BULLISH — BUT WHICH WAY IS IT TRENDING?

vote share recomputed weekly, 13 weeks



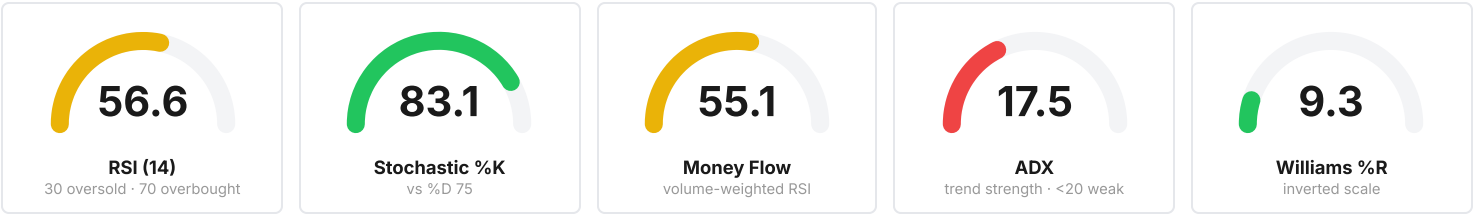
INDICATOR VOTE GRID

20 bull / 2 bear

● Price vs SMA 20	\$153.23	● Price vs SMA 50	\$156.50	● Price vs SMA 200	\$149.80
● EMA 9/21 Cross	153.5/153.5	● SMA 50/200	Golden	● ADX Direction	ADX 17
● Supertrend	\$159	● Parabolic SAR	\$142	● SMA Slope	0.210
● RSI	56.6	● Stochastic K/D	83/75	● StochRSI K/D	92/82
● Williams %R	-9	● CCI	117	● TSI vs Signal	-2.8
● CMO	13.1	● ROC	1.48%	● OBV Signal	Accum
● Chaikin MF	0.060	● MFI	55	● Force Index	0M
● Elder Ray Bull	4.48				

INDICATOR GAUGES

site technicals-tab style



33 KEY LEVELS & VOLATILITY

live indicator table

LEVEL	VALUE	LEVEL	VALUE
Pivot / R1 / R2	\$155.35 / \$156.69 / \$157.62	S1 / S2	\$154.42 / \$153.08
Bollinger (20,2)	\$148.83 – \$157.63	Squeeze	ON
52-wk range	\$125.00 – \$183.11	Off 52-wk high	-14.5%
ATR (14)	\$3.61 (2.3%)	Historical vol	23.6%

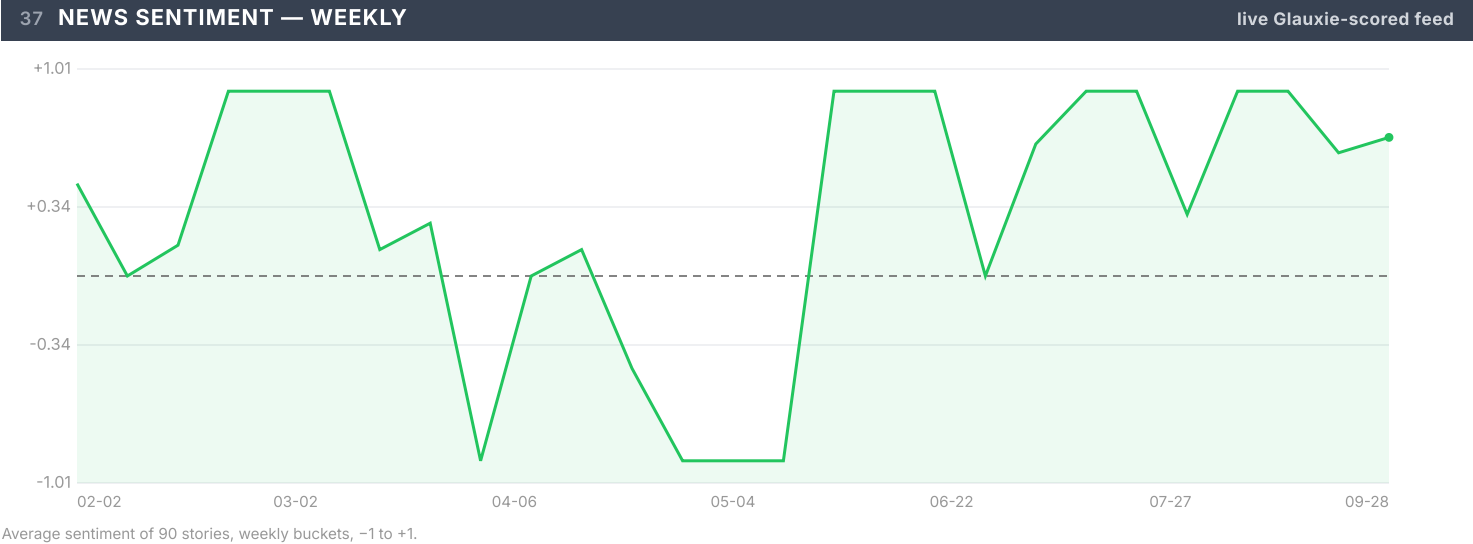
NOT INVESTMENT ADVICE — FOR INFORMATIONAL PURPOSES ONLY

34 SEASONALITY — 13-YEAR AVERAGES											live model · win rates shown
+2.0% Jan 62%	+0.8% Feb 46%	-1.0% Mar 46%	+2.0% Apr 75%	+0.4% May 67%	+2.4% Jun 67%	+2.3% Jul 50%	-0.1% Aug 50%	-0.4% Sep 42%	+1.4% Oct 33%	+2.1% Nov 85%	-0.5% Dec 46%

Sample: 13 years — treat short histories as suggestive, not statistical.

35 RISK INDICATORS			computed from live price history
COMPUTED FROM LIVE WEEKLY PRICES		ALLE	S&P 500
Weekly volatility (σ , 1y)		4.05%	1.83%
Best / worst week (1y)		+13.2% / -10.1%	—
Max drawdown (5y, monthly)		-36.0%	—
1-week VaR (95%)		-6.8%	—
Beta (5y)		0.84	1.00

36 EQUITY WEATHER & MARKET REGIME		EDGE · live weather engine
ALLE EQUITY WEATHER (LIVE)		MARKET REGIME (2026-10-16)
CLOUDY · +6		NEUTRAL
Trend	-6	VIX 19.99 Normal
Momentum	+30	DOW THEORY Confirmed Bearish
Volume	+41	SPY / QQQ TSI 7.2 / 4.7 trend strength
Volatility	-30	SECTOR STRENGTH 46/100 breadth average
Breadth	-32	



THIS SPACE INTENTIONALLY LEFT BLANK — THE NEXT SECTION BEGINS ON THE FOLLOWING PAGE

NOT INVESTMENT ADVICE — FOR INFORMATIONAL PURPOSES ONLY

38 WEATHER - COMPANY VS INDUSTRY, SECTOR, UNIVERSE

EDGE · live weather engine · Cloudy

OVERALL +5.9 +25.7 vs industry	TREND -6.4 +0.7 vs industry	MOMENTUM +29.5 +56.2 vs industry	VOLUME +40.6 +58.2 vs industry
---	--	---	---

READING	ALLE	SECURITY & PROTECTION SERVICES N=140	INDUSTRIALS N=9,922	ALL US SYMBOLS N=70,435
Overall	+5.9	-19.8	-24.1	-20.5
Trend	-6.4	-7.1	-26.2	-21.3
Momentum	+29.5	-26.7	-24.5	-15.8
Volume	+40.6	-17.6	-22.6	-3.8

Trend, momentum and volume are computed per company. Volatility and breadth are market-regime values shared by every symbol in the universe, so they are reported once under Market Regime rather than compared here - a company cannot differ from its sector on a constant.

39 EXECUTIVE COMPENSATION

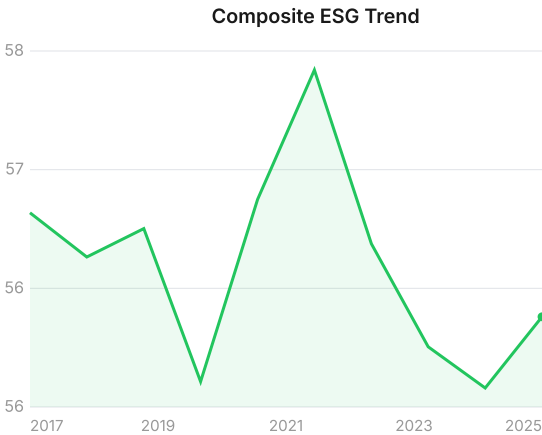
live proxy data · FY2025

EXECUTIVE	TOTAL COMP	STRUCTURE
John H. Stone President and CEO	\$9.2M	71% equity+incentive
Michael J. Wagnes Senior Vice President and	\$3.1M	64% equity+incentive
Timothy P. Eckersley President, Internationa	\$2.8M	48% equity+incentive
David S. Ilardi Senior Vice President, Alleg	\$2.2M	60% equity+incentive
Joseph C. Blasko Senior Vice President and G	\$2.0M	45% equity+incentive

40 ESG ASSESSMENT

live disclosure-derived scores

PILLAR (LIVE DISCLOSURE SCORES)	SCORE
Environmental	46
Social	58
Governance	65
Composite ESG	56



41 8-K MATERIAL EVENTS

live EDGAR feed

FILED	8-K CONTENTS	ITEMS
2026-09-08	Officer/Director Change; Regulation FD; Exhibits	5.02,7.01,9.01
2026-07-23	Earnings Release; Exhibits	2.02,9.01
2026-06-09	Shareholder Vote	5.07
2026-04-28	Earnings Release; Exhibits	2.02,9.01
2026-04-15	Other Events	8.01
2026-02-17	Results of Operations and Financial Condition; Financial Statements an	2.02,9.01
2025-12-09	Entry into Material Definitive Agreement; Creation of Direct Financial	1.01,2.03,9.01
2025-10-23	Results of Operations and Financial Condition; Financial Statements an	2.02,9.01

NOT INVESTMENT ADVICE — FOR INFORMATIONAL PURPOSES ONLY

42 METHODOLOGY

Methodology. Every figure originates in InsiderStreet's production data layer and is computed deterministically by the same engines that power insiderstreet.ai. This factsheet contains no model-written text. Sections without underlying data are omitted rather than estimated.

43 DISCLOSURES

DISCLOSURES. This document is produced by InsiderStreet.ai from live production data. It is not investment advice, not an offer or solicitation to buy or sell any security, and not a recommendation tailored to any person. Data is sourced as of the dates shown and may no longer be current. InsiderStreet.ai is not a registered investment adviser or broker-dealer. Investing involves risk, including loss of principal. Past performance does not guarantee future results. Do not make any investment decision based on this document. © 2026 InsiderStreet.ai — all rights reserved. Redistribution prohibited.

44 DATA PROVENANCE FOR THIS REPORT

sources · coverage · method

DATA DOMAIN	SOURCE	COVERAGE FOR THIS REPORT
Price & volume	market_db.historical_prices	52 rows
Fundamentals	income_statements_annual	6 rows · 2020 to 2025
Reported vs consensus	fact/earnings_calendar	24 rows · 2020-10-22 to 2026-07-23
Analyst estimates	dim/forward_estimates	3 rows · 2026-12-31 to 2028-12-31
Institutional ownership (13F)	holdings_db.institutional_ownership_summary	51 rows · 2013 to 2026
Insider transactions (Form 4)	edgar/form4	12 rows · 2026-07-23 to 2026-08-28
Proposed sales (Form 144)	edgar/form144	1 record
Beneficial ownership (13D/G)	edgar/13dg	4 rows · 2026-04-28 to 2026-08-07
Short-sale volume (FINRA)	edgar/short_volume_daily	60 rows · 2026-07-23 to 2026-10-15
Dark pool (ATS, tier 1)	edgar/darkpool_weekly	12 rows · 2026-06-15 to 2026-08-31
ETF & fund holding	etf_holdings_changelog (30d)	1 record
Peer set	stock_peers_dynamic	8 rows
Industry medians	industry_medians	1 record
Congressional trades	congress_db (House + Senate)	1 record
ESG	fact/esg_disclosures	1 record

Method. Every figure in this factsheet is looked up from a named field computed in code. It contains no model-written text.

Not covered. Short interest as a percent of float and days-to-cover are not in this data set — the short-sale figures above are FINRA volume, a flow, and cannot support squeeze or covering analysis. Options positioning and intraday data are also absent. 13F ownership is filed 45 days after quarter end and congressional trades are disclosed on a lag, so both describe a past position, not a current one.