

A. O. Smith Corporation (AOS)

Industrials / Industrial - Machinery · New York Stock Exchange

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

LAST CLOSE	MARKET CAP	52-WK HIGH	TRAILING PE	GROSS MARGIN	ROE	PIOTROSKI	1-YR RETURN
\$59.22	\$8.0B	\$81.87	16.5	38.6%	27%	5/9	-12.7%
2026-10-16	VOLUME	52-WK LOW	P/S	NET MARGIN	ROIC	ALTMAN Z	5-YR RETURN
	1.7M	\$54.16	2.12	13.1%	18%	6.1	+46.4%

A. O. Smith Corporation (AOS) is a global manufacturer and marketer specializing in a comprehensive array of water heating and treatment solutions. Its operations span North America, China, Europe, and India, organized into two primary geographic segments: North America and Rest of World. The company's product portfolio is extensive, featuring residential and commercial water heaters (gas, heat pump, and electric models), boilers, storage tanks, and various water treatment systems. These products cater to a wide range of applications, including homes, apartments, and condominiums, as well as commercial entities such as restaurants, hotels, office buildings, laundries, car washes, small businesses, hospitals, and schools. Specific offerings include diverse water treatment products like point-of-entry water softeners, well water purification systems, whole-home filtration units, portable filtration bottles, point-of-use carbon filters, and reverse osmosis systems, designed for residential, restaurant, hotel, and office use. A. O. Smith also supplies food and beverage filtration products, expansion tanks, commercial solar water heating installations, and heaters for swimming pools and spas, along with associated components. Advanced heating solutions further encompass heat pumps, electric wall-hung units, gas tankless heaters, combi-boilers, and integrated heat pump and solar water heaters. Products are primarily sold under established brands such as A. O. Smith, State, and Lochinvar, in addition to specialized water softener brands. The company leverages various distribution channels, including independent wholesale plumbing distributors, retail outlets like hardware and home center chains, and manufacturer representative firms. Its Aquasana-branded products are sold directly to consumers through e-commerce platforms and other online retailers. Founded in 1874, A. O. Smith Corporation maintains its corporate headquarters in Milwaukee, Wisconsin.

SECTOR Industrials INDUSTRY Industrial - Machinery EXCHANGE NYSE MARKET CAP \$8.0B EMPLOYEES 11,500 (SEC-filed) CEO Stephen Shafer IPO 1983-09-30
COUNTRY US
11270 West Park Place, Milwaukee, WI 53224 · Tel 414 359 4000 · aosmith.com

1 INSIDERSTREET SCORE

INSIDERSTREET SCORE

65 / 100

Street mean **\$73.00** (2 analysts, last qtr) — their number, not ours

INSIDER CONSENSUS SIGNAL

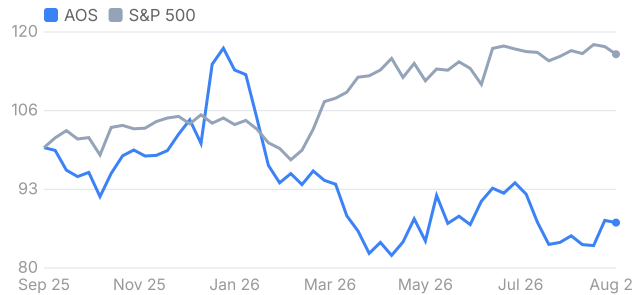
ROUTINE SELLING — LOW SIGNAL

\$0M sold / 6 mo, zero open-market buys

2 PRICE AND VOLUME

adjusted close, prod data layer

1 Year vs S&P 500 · **AOS -12.7%** · **S&P 500 +15.9%** · spread **-28.6pp**



7 Years vs S&P 500 · **AOS +46.4%** · **S&P 500 +189.9%** · spread **-143.5pp**



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.

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3 INSIDERSTREET SCORE

live IS factor model

INSIDERSTREET
SCORE
65
OF 100

Score Breakdown

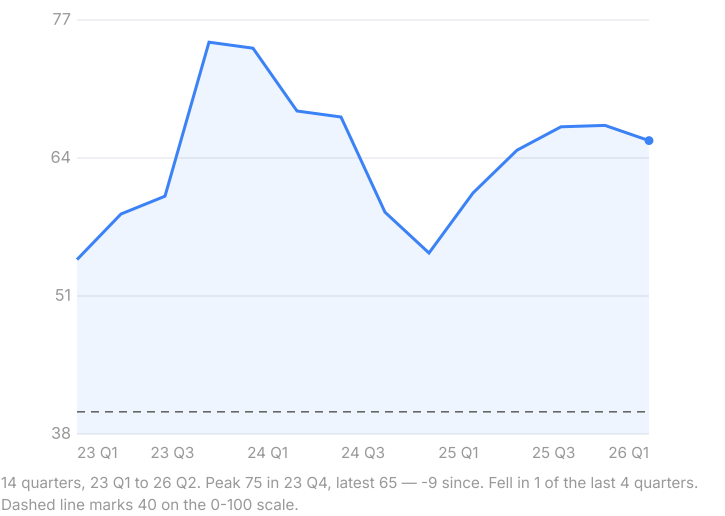
Profitability	66/100
Growth	39/100
Momentum	68/100
Quality	76/100
Earnings Quality	71/100
Balance Sheet	71/100
Value	55/100
Risk (safety)	100/100
Overall	65.4/100

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
MOD	49
ZWS	77
PNR	60
FLS	62
GTES	62
GTLS	13
AOS	65

IS Score Trend — quarterly



4 TWO READINGS

business vs price

BUSINESS QUALITY

65 / 100

IS Score 65.4 / 100 · -9.2 from peak of 75

Quarter	Business Quality
23 Q1	53
23 Q2	58
23 Q3	62
23 Q4	75
24 Q1	74
24 Q2	68
24 Q3	68
24 Q4	60
25 Q1	55
25 Q2	62
25 Q3	65
25 Q4	65
26 Q1	65

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

PRICE STRUCTURE

BULLISH

Technical Score 66 / 100 · Power +32 · 17 of 22 indicator votes bullish

Date	Price Structure
07-23	26%
08-13	87%
09-03	26%
09-25	26%
10-16	87%

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 66 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.

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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 65.4	would move us up one band
IS Score stops falling - one quarter higher than the prior	last four: 65 → 67 → 67 → 65	the direction matters more than the level
Technical vote share back above 50%	now 73%	price structure no longer broken
Institutional holder count rises two quarters running	peak 662 → now 616	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.

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.

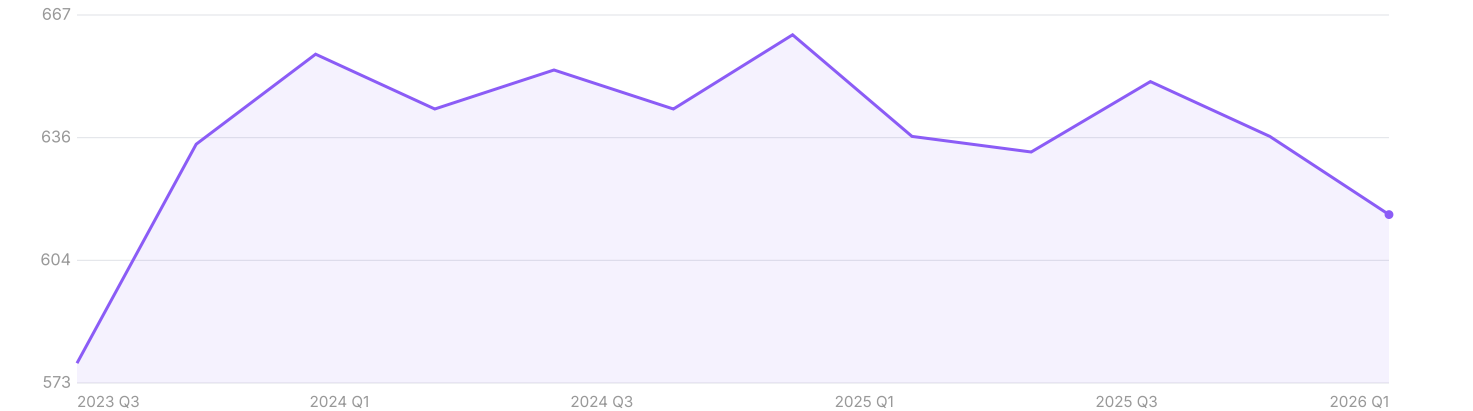
6 SMART MONEY CONFLUENCE EDGE · disclosure sources

SITE CONVERGENCE SCORE 1 of 4 top 66% of 29,420 symbols	SOURCES ALIGNED — of 3 independent disclosures	CONGRESS (180D) 0 buys none disclosed	INSIDER BUYS (180D) 0 none disclosed
ETF FUNDS (30D) 532 up / 556 down net -24 funds	INSTITUTIONS ADDED (13F) -20 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 662 · latest 616 (-46 from peak).

QUARTER	HOLDERS	13F SHARES	VALUE	REPORTED OWN%
2026 Q2	616	127.1M	\$7.8B	91.8%
2026 Q1	636	117.7M	\$7.6B	85.0%
2025 Q4	650	117.5M	\$7.7B	84.8%
2025 Q3	632	106.6M	\$7.9B	77.0%
2025 Q2	636	109.0M	\$7.1B	78.7%
2025 Q1	662	111.5M	\$7.2B	80.5%
2024 Q4	643	110.8M	\$7.5B	80.0%
2024 Q3	653	110.0M	\$9.8B	79.4%
2024 Q2	643	111.0M	\$9.0B	80.2%
2024 Q1	657	113.9M	\$10.0B	82.2%
2023 Q4	634	111.5M	\$9.0B	80.5%
2023 Q3	578	112.5M	\$7.4B	81.2%

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.

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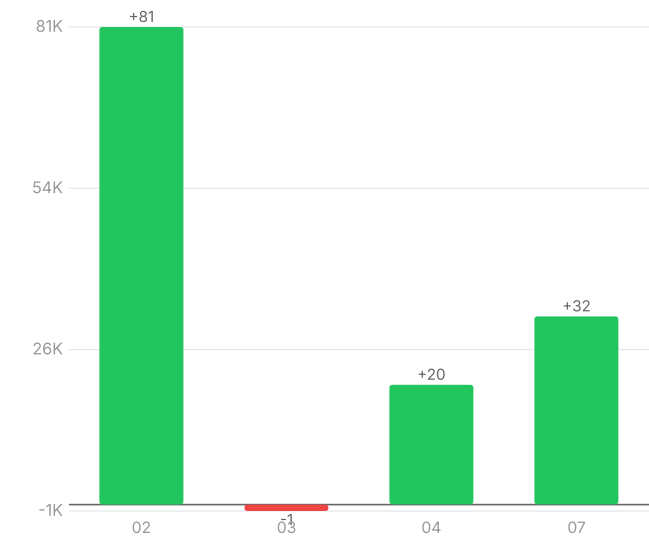
8 INSIDER ACTIVITY live Form 4 data

INSIDER	ROLE	DATE	TYPE	SHARES	VALUE	POST-TXN OWNED
Anderson Carrie L	EVP & CFO	2026-07-01	A-Award	32,060	—	32,060
Saak Aaron W	director	2026-04-23	A-Award	2,296	—	2,296
Saak Aaron W	director	2026-04-13	A-Award	2,262	—	2,262
Smith Mark D	director	2026-04-13	A-Award	2,262	\$0.15M	118,504
Martin Lois M	director	2026-04-13	A-Award	2,262	\$0.15M	6,445
Mapes Christopher L	director	2026-04-13	A-Award	2,262	\$0.15M	8,684
Larsen Michael M	director	2026-04-13	A-Award	2,262	—	13,284
Kadri Ilham	director	2026-04-13	A-Award	2,262	\$0.15M	23,579

9 SELL DECOMPOSITION — ROUTINE VS. DISCRETIONARY EDGE

6-MO DECOMPOSITION (FORM 4)	TXNS	SHARES	VALUE	SIGNAL WEIGHT
S — Open-market sales	1	1,104	\$0.1M	Counted
P — Open-market purchases	0	0	\$0	Counted — none occurred

Monthly Net Insider Flow (000 shares)



Net of acquisitions minus dispositions, all Form 4 types.

Signal Summary

SIGNAL	OPEN-MARKET SELLS	OPEN-MARKET BUYS	CLUSTER
Routine Selling — Low Signal	\$0.1M 1 txns / 6 mo	\$0.0M 0 txns / 6 mo	None active 3+ insiders / 21 days

10 FORM 144 PLANNED-SALE PIPELINE live EDGAR data

FILED	FILER	SHARES REGISTERED	EST. PROCEEDS
2026-03-04	Darrell Schuh	1,104	\$0.1M
2025-07-30	Kevin J & Constance Y Wheeler Rt	22,200	\$1.6M
2025-07-29	Mark D Smith	2,400	\$0.2M
2024-08-07	Samuel M Carver	14,705	\$1.2M
Trailing 12 mo	1 filings	1,104	\$0M

11 13D / 13G STAKES COND

FILED	FORM	REPORTING PERSON	% OF CLASS	SHARES
2026-08-07	SCHEDULE 13G/A	Abigail P. Johnson	10.70%	11.7M sh
2026-04-28	SCHEDULE 13G	Vanguard Portfolio Management	6.32%	7.1M sh
2026-03-25	SCHEDULE 13G/A	The Vanguard Group	—	exit/reporting change
2026-02-09	SCHEDULE 13G	STATE STREET CORPORATION	5.20%	5.9M sh

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12 CONGRESSIONAL TRADING					EDGE · STOCK Act
MEMBER	CHAMBER	TRADE	SIZE BAND	TRADED	DISCLOSED
Julie Johnson	House	SELL	\$1,001 - \$15,000	2025-09-25	2025-10-08
Julie Johnson	House	SELL	\$1,001 - \$15,000	2025-09-24	2025-10-08
Julie Johnson	House	BUY	\$1,001 - \$15,000	2025-09-23	2026-08-06
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 FLOW				live 13F data
13F FILERS (LAST COMPLETE Q) 636		13F SHARES 118M 85.0% of shares out		NEW / CLOSED 85 / 83 positions, QoQ
PUT/CALL (13F) 0.92 option positions		FREE FLOAT 79.8% 108M sh		INCREASED / REDUCED 230 / 236 positions, QoQ

2.8 · Largest Reporting 13F Managers

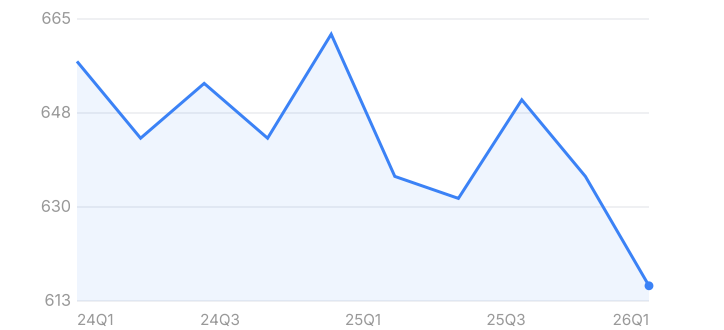
MANAGER	SHARES	VALUE
Sarasin & Partners Llp	1.1M	\$60M
Confluence Investment Management L	284,138	\$16M
Wedge Capital Management L L P/Nc	209,124	\$12M
Wealth Enhancement Advisory Servic	173,979	\$10M
Perpetual Ltd	162,602	\$9M
Assenagon Asset Management S.A.	112,042	\$6M

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

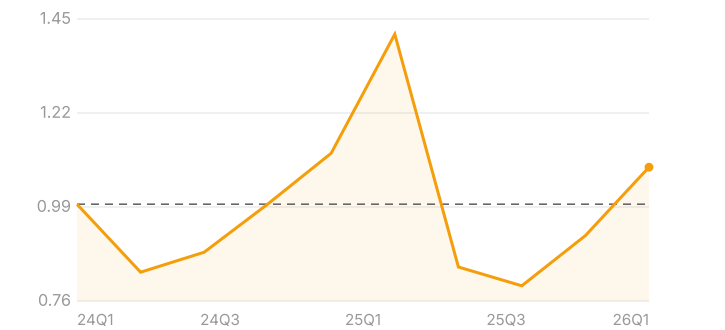
2.9 · Top ETF & Fund Ownership

FUND	WEIGHT	POSITION
RSP	0.2%	\$198M
VITSX	0.0%	\$195M
VTSAX	0.0%	\$195M
VSMPX	0.0%	\$195M
VTI	0.0%	\$195M
VFIAX	0.0%	\$163M

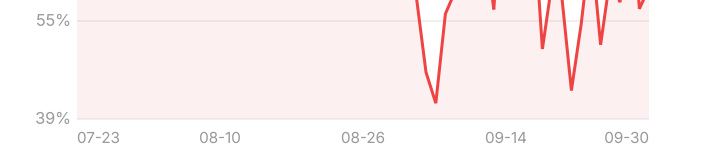
13F Filers Holding AOS — quarterly



Institutional Put/Call — quarterly



14 SHORT VOLUME — DAILY, 60 SESSIONS				EDGE · live FINRA feed
LATEST SESSION 60.4% 2026-10-15		20-DAY AVG 63.2% 50-day 68.1%		TREND Falling 20d vs 50d
				BY MARKET CENTER Q: 59% · N: 81% · B: 28% latest session

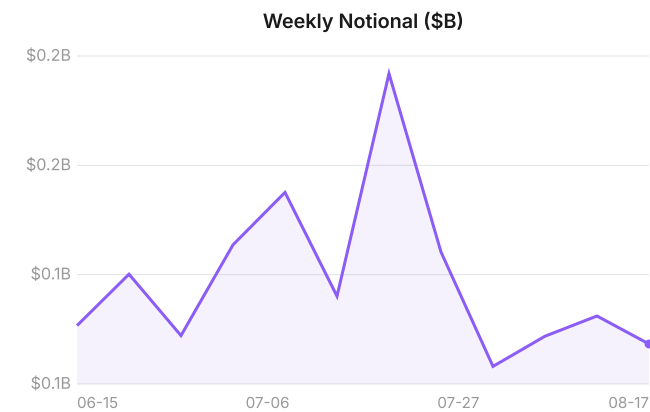


Daily short-sale volume as % of volume reported in FINRA's short-sale file — a flow measure, not short interest; dashed = 50-day average.

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15 DARK POOL ACTIVITY

EDGE · live ATS data

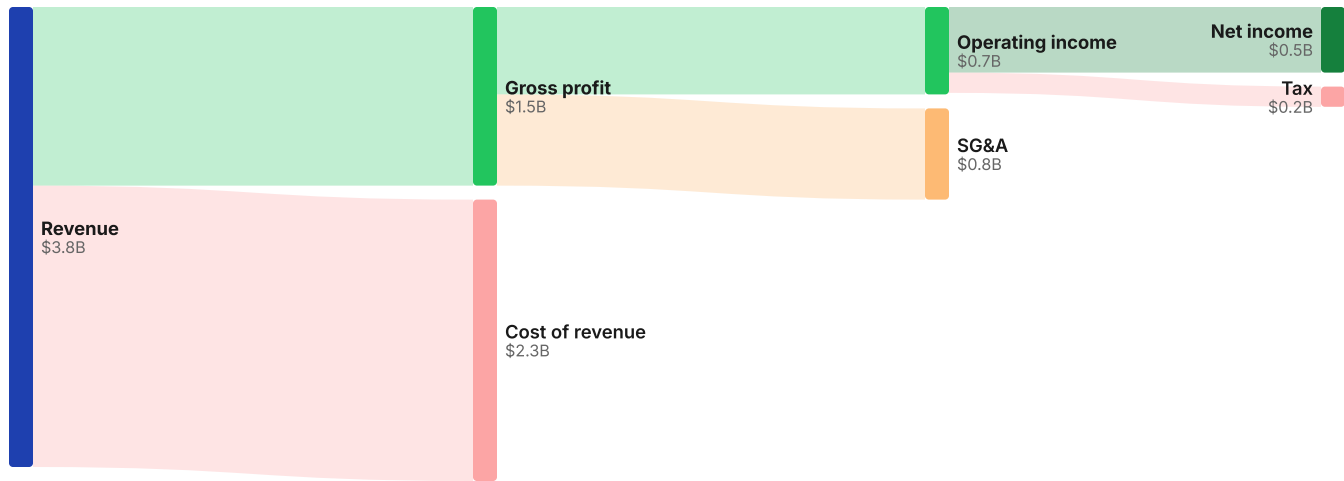


Where AOS Trades in the Dark

ATS VENUE (4-WK)	SHARES	AVG TRADE
Incr Intelligent Cross Llc	1.6M	48 sh
Ubsa Ubs Ats	1.3M	51 sh
Mstx Ms Trajectory Cross (Ats - 1)	1.2M	44 sh
Sgmt Sigma X2	1.2M	43 sh
Ebxl Level Ats	0.9M	25 sh
Mlix Instinct X	0.7M	55 sh

16 REVENUE FLOW — FY2025

live income data



Where a dollar of A. O. Smith Corporation revenue goes. All values FY2025 filings, live. Product segmentation not yet parsed for this symbol — revenue shown unsegmented.

17 GEOGRAPHIC REVENUE

live segmentation

REGION	REVENUE	SHARE
North America	\$2.6B	68%
Rest of World	\$1.2B	32%

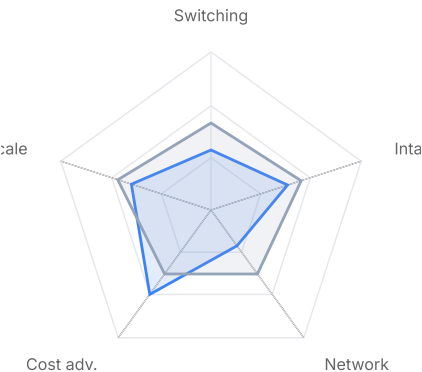
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18 MOAT & COMPETITIVE POSITION

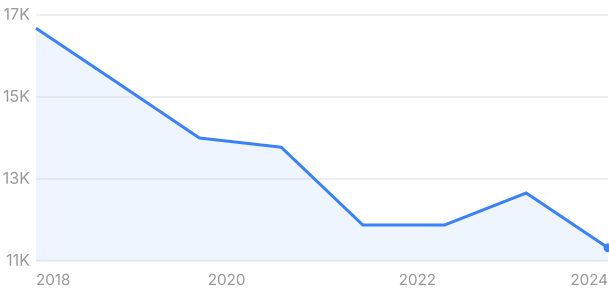
LIVE MODEL · 48/100 WEAK

Moat score 48/100 — Weak; primary source Cost Advantage.



■ AOS (live moat model) ■ Peer median: MOD · ZWS · PNR · FLS · GTES
Component scores from the live moat model. Peer median illustrative.

3.8 · Employees (SEC filings)



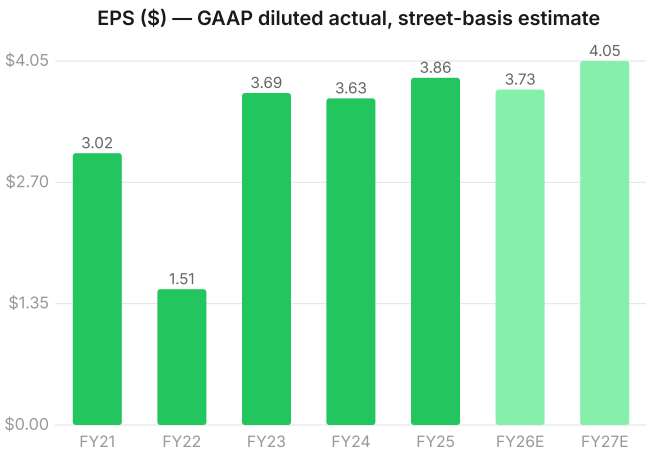
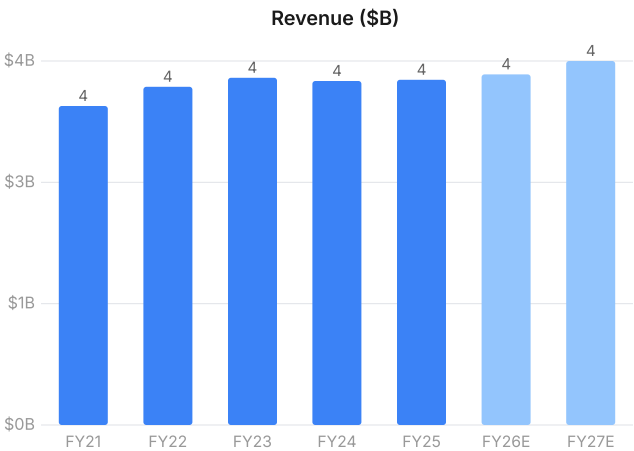
19 CORPORATE INFORMATION — KEY OFFICERS

11,500 employees

OFFICER	TITLE
Kevin J. Wheeler	Executive Director
Stephen Shafer	President, CEO & Chairman
Carrie L. Anderson	Executive Vice President & Chief Financial Officer
Charles T. Lauber	Executive Vice President

20 REVENUE & EPS — HISTORY AND ESTIMATES

live consensus

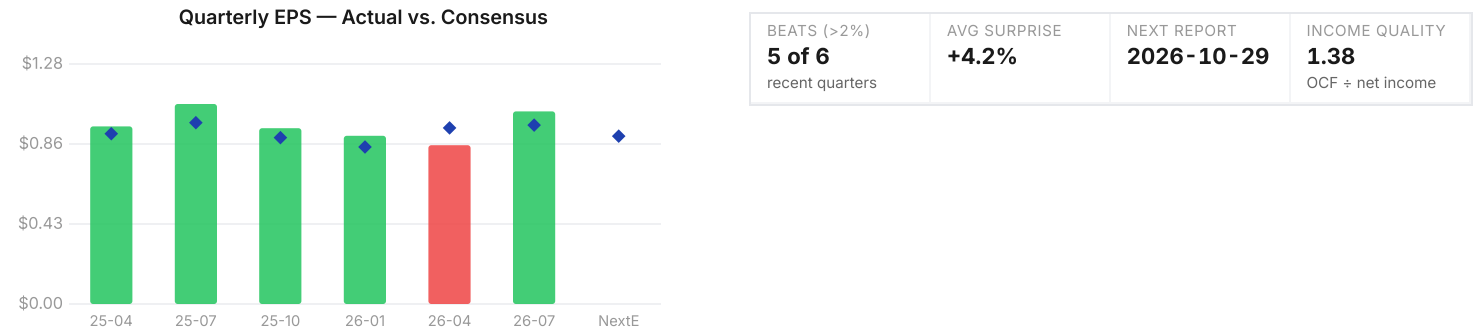


Actual bars are GAAP diluted EPS from the filed income statement; the lighter forward bars are street-basis consensus. The two are different measures and are not comparable quarter to quarter.

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21 ESTIMATE VS. ACTUAL & SURPRISES

live data



22 REPORTED VS. CONSENSUS — FULL HISTORY

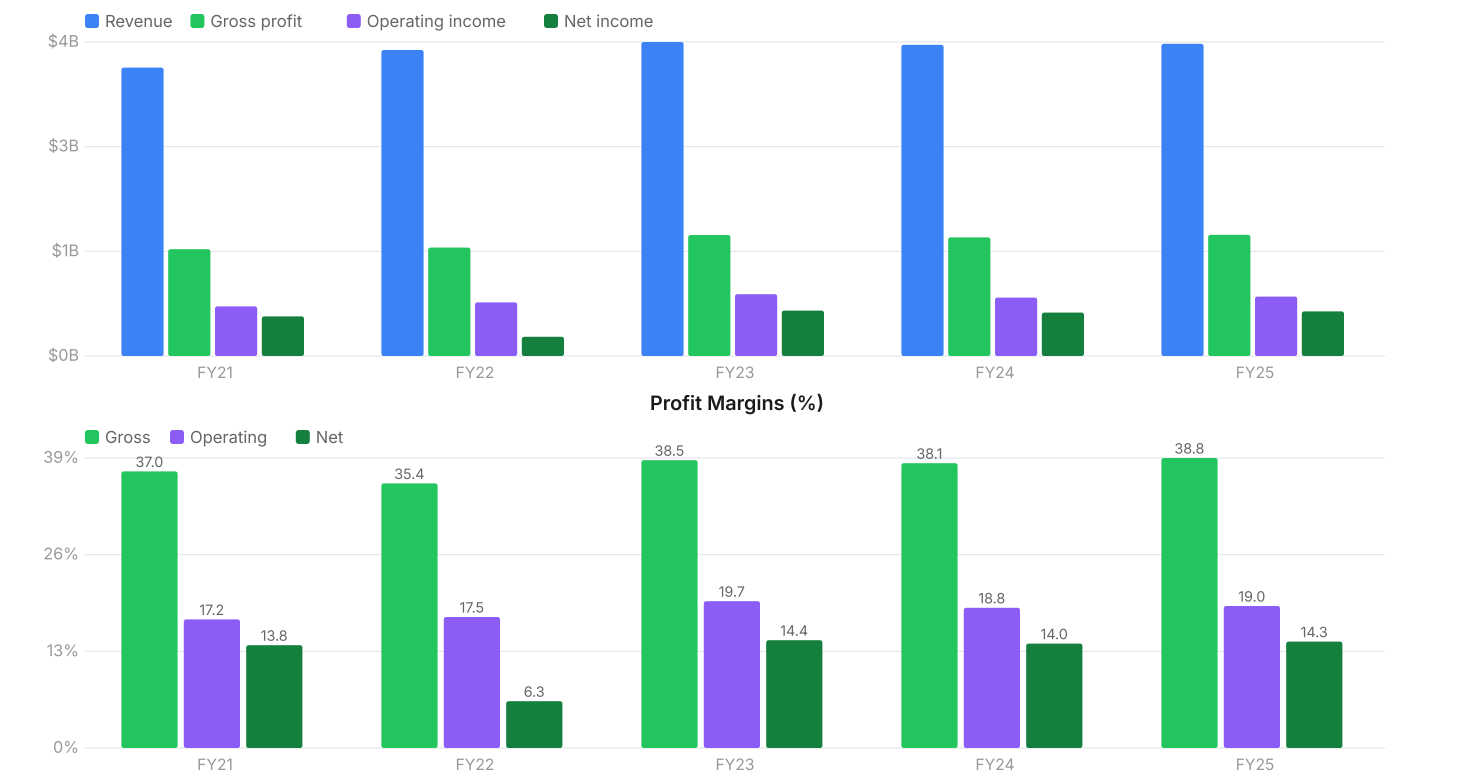
0 quarters · live data

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

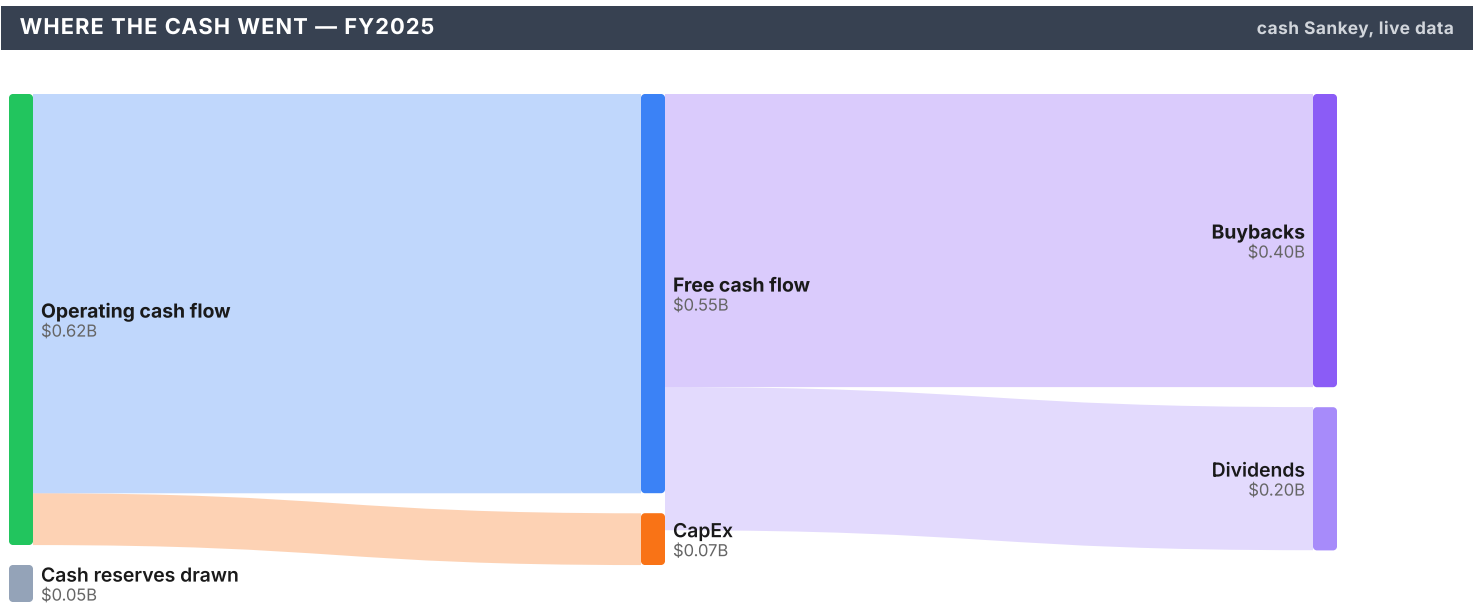
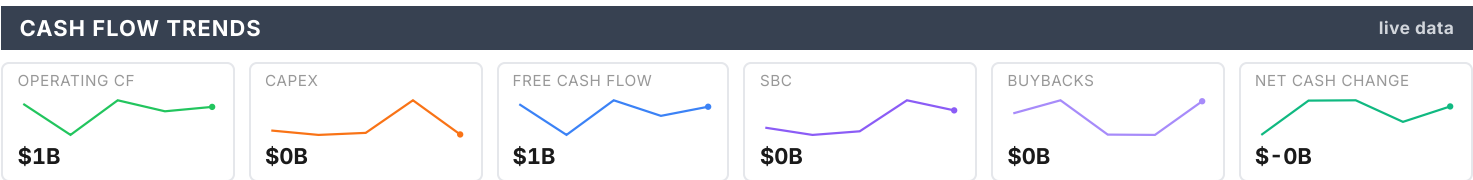
live financials



YOY GROWTH	FY21	FY22	FY23	FY24	FY25
Revenue	+22.2%	+6.1%	+2.6%	-0.9%	+0.3%
Gross profit	+18.3%	+1.4%	+11.7%	-1.9%	+2.1%
Operating income	+36.6%	+8.1%	+15.0%	-5.4%	+1.6%
Net income	+41.2%	-51.6%	+136.1%	-4.1%	+2.4%

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23 INCOME STATEMENT — FULL						live financials
\$B · FY ENDS	FY21	FY22	FY23	FY24	FY25	TREND
Revenue	3.5	3.8	3.9	3.8	3.8	
Cost of revenue	2.2	2.4	2.4	2.4	2.3	
Gross profit	1.3	1.3	1.5	1.5	1.5	
R&D expense	0.1	0.1	0.1	0.1	0.0	
SG&A expense	0.7	0.7	0.7	0.8	0.8	
Operating income	0.6	0.7	0.8	0.7	0.7	
EBITDA	0.7	0.3	0.8	0.8	0.8	
D&A	0.1	0.1	0.1	0.1	0.1	
Pretax income	0.6	0.2	0.7	0.7	0.7	
Income tax	0.1	-0.0	0.2	0.2	0.2	
Net income	0.5	0.2	0.6	0.5	0.5	
Diluted EPS (\$)	3.02	1.51	3.69	3.63	3.86	
Diluted shares (M)	161	156	151	147	140	



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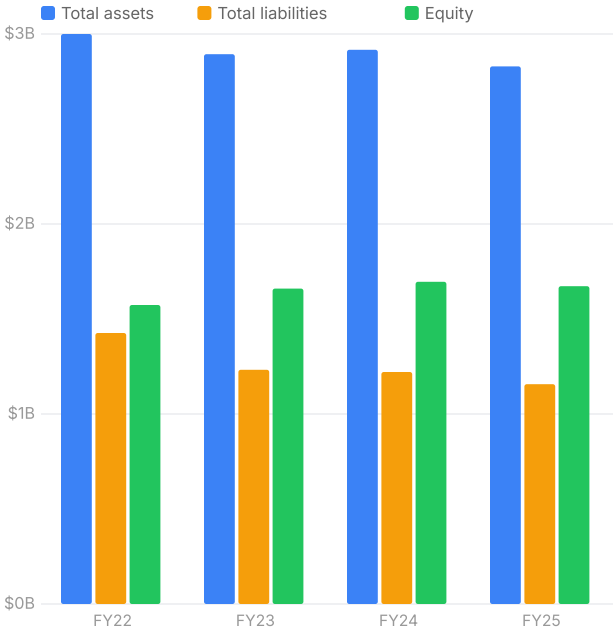
Balance Sheet — Full

\$B	FY22	FY23	FY24	FY25	
Cash & equivalents	0.4	0.3	0.2	0.2	
ST investments	0.1	0.0	0.0	0.0	
Receivables (net)	0.6	0.6	0.5	0.6	
Total current assets	1.6	1.5	1.4	1.3	
PP&E (net)	0.6	0.6	0.7	0.7	
Goodwill + intangibles	1.0	1.0	1.1	1.1	
Total assets	3.3	3.2	3.2	3.1	
Accounts payable	0.6	0.6	0.6	0.5	
Short-term debt	0.0	0.0	0.0	0.0	
Deferred revenue	0.0	0.0	0.0	0.0	
Total current liabilities	0.9	0.9	0.9	0.9	
Long-term debt	0.3	0.1	0.2	0.1	
Total liabilities	1.6	1.4	1.4	1.3	
Shareholders' equity	1.7	1.8	1.9	1.9	

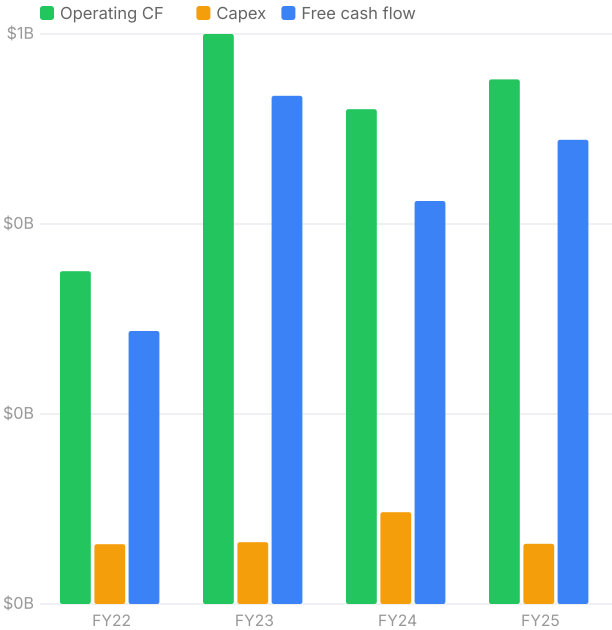
Cash Flow Statement — Full

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

Balance Sheet Structure (\$B)



Cash Generation vs Capex (\$B)



Left: what the balance sheet is made of — the gap between the assets bar and the liabilities bar is book equity. Right: whether the capex bar is covered by the operating-cash bar; where it is not, the difference was funded externally and free cash flow goes negative.

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24 EXPANDED RATIO ANALYSIS (I)							live ratio engine · profitability · valuation
RATIO	FY21	FY22	FY23	FY24	FY25	TTM	TREND
PROFITABILITY							
ROE	26.5%	13.2%	31.0%	28.6%	29.2%	27%	
ROA	14.7%	6.9%	17.0%	16.5%	17.1%	13.7%	
ROIC	33.4%	42.3%	35.1%	29.9%	29.9%	18.4%	
Gross margin	37.0%	35.4%	38.5%	38.1%	38.8%	38.6%	
Operating margin	17.2%	17.5%	19.7%	18.8%	19.0%	17.6%	
Net margin	13.8%	6.3%	14.4%	14.0%	14.3%	13.1%	
EBITDA margin	20.0%	8.3%	21.4%	20.6%	20.7%	19.9%	
FCF margin	16.0%	8.6%	15.5%	12.4%	14.3%	—	
VALUATION							
P/E	26.23	35.21	21.34	18.26	17.13	16.5	
P/B	6.97	4.75	6.44	5.17	5.04	4.5	
P/S	3.61	2.21	3.08	2.55	2.44	2.12	
P/FCF	22.58	25.85	19.87	20.56	17.14	12.6	
EV/EBITDA	17.47	26.40	14.16	12.45	11.50	11.3	
EV/Revenue	3.49	2.18	3.03	2.54	2.44	2.2	
Earnings yield	3.8%	2.8%	4.7%	5.5%	5.8%	6.10%	
FCF yield	4.4%	3.9%	5.0%	4.9%	5.8%	7.94%	
EXPANDED RATIO ANALYSIS (II)							leverage · solvency
RATIO	FY21	FY22	FY23	FY24	FY25	TTM	TREND
LEVERAGE & SOLVENCY							
Current ratio	1.57	1.75	1.59	1.55	1.50	1.59	
Quick ratio	1.17	1.20	1.06	0.96	0.94	1.04	
Debt / equity	0.12	0.21	0.08	0.12	0.10	0.37	
Debt / assets	6.3%	11.0%	4.8%	6.7%	6.1%	18.6%	
Net debt / EBITDA	-0.58	-0.37	-0.25	-0.08	-0.00	0.65	
Interest coverage	146.49	24.80	62.12	104.27	54.03	—	

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EXPANDED RATIO ANALYSIS (III)							efficiency · growth · per-share · scores
RATIO	FY21	FY22	FY23	FY24	FY25	TTM	TREND
EFFICIENCY							
Asset turnover	1.07	1.10	1.18	1.18	1.20	1.04	
Receivables turnover	5.80	6.18	6.55	6.71	6.82	5.7	
DSO (days)	63	59	56	54	54	64	
DPO (days)	110	103	95	92	85	82	
Cash conversion cycle	14	28	39	42	47	58	
GROWTH (YoY)							
Revenue growth	22.2%	6.1%	2.6%	-0.9%	0.3%	—	
Net income growth	41.2%	-51.6%	136.1%	-4.1%	2.4%	—	
EPS growth	43.6%	-49.4%	142.0%	-1.7%	6.6%	—	
FCF growth	12.0%	-43.3%	86.1%	-20.7%	15.2%	—	
PER SHARE (\$)							
EPS (diluted, TTM)	3.04	1.54	3.72	3.66	3.90	3.61	
Book value / share	11.44	11.41	12.34	12.92	13.28	13.30	
Revenue / share	22.09	24.51	25.78	26.19	27.37	27.47	
FCF / share	3.53	2.10	4.00	3.25	3.90	4.62	
Cash / share	3.94	3.15	2.43	1.89	1.38	1.31	
SHAREHOLDER RETURN & SCORES							
Buyback yield	2.9%	4.9%	2.6%	3.1%	4.3%	3.59%	
Altman Z-Score	7.64	5.96	8.79	7.94	8.28	6.1	
Piotroski F-Score	6	7	8	4	8	5/9	
Beneish M-Score	-2.50	-2.78	-2.63	-2.60	-2.54	-2.57	

25 EARNINGS QUALITY PANEL				live scores
MODEL	SCORE	ZONE	NOTE	
Piotroski F-Score	5 / 9	Middling		
Altman Z-Score	6.1	Safe (>2.99)	Safe	
Income quality	1.38	Cash-backed	OCF ÷ net income	
Beneish M-Score	-2.57	Non-manipulator	vs -2.22 threshold	

26 DUPONT & GROWTH QUALITY				live analysis engine
DUPONT DECOMPOSITION (TTM)		VALUE	GROWTH QUALITY (LIVE)	VALUE
Tax burden		0.78	Revenue stability	0.64
Interest burden		0.97	Earnings stability	0.09
Operating margin		17.5%	Earnings persistence	0.99
Asset turnover		1.10×	Revenue CAGR 3y	0.6%
Financial leverage		1.87×	EPS CAGR 3y	26.0%
= ROE		27%	FCF CAGR 3y	6.2%

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SHAREHOLDER RETURN PROFILE live

BUYBACK YIELD 3.59%	DIVIDEND YIELD 2.43%	TOTAL SHAREHOLDER RETURN 5.86% cash yield	SBC / REVENUE 0.4% dilution pressure
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27 MULTIPLE HISTORY — FY SNAPSHOTS + TTM live ratio engine



28 PEER COMPARISON live peer engine

COMPANY	MKT CAP	P/E	ROE	NET MARGIN	REV GROWTH	PIOTROSKI	1-YR RET
MOD	\$7.9B	55.8	13%	8.5%	+29.5%	5/9	-7.3%
ZWS	\$7.8B	28.5	17%	25.6%	+7.7%	9/9	+3.4%
PNR	\$8.5B	13.3	18%	13.8%	-2.1%	7/9	-50.7%
FLS	\$9.0B	24.5	17%	8.5%	-0.3%	6/9	+39.9%
GTES	\$6.5B	18.1	11%	18.2%	+3.3%	8/9	—
GTLS	\$10.0B	-233.2	-1%	-1.9%	-1.5%	4/9	—
DCI	\$10.2B	22.4	28%	12.2%	+5.3%	7/9	—
RRX	\$10.3B	31.6	5%	7.5%	+3.5%	8/9	—

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

29 ANALYST CONSENSUS & ESTIMATES live consensus

Hold

30 Analysts



MEAN TARGET (QTR) \$73.00 2 targets	TARGET VS. PRICE +23.3% last-quarter mean	NEXT REPORT 2026-10-29 street \$0.90
--	---	--

CONSENSUS ESTIMATES	REVENUE MEAN	HIGH / LOW	EPS MEAN	HIGH / LOW	# EPS EST.
FY2026	\$3.89B	\$3.91B / \$3.85B	\$3.73	\$3.78 / \$3.68	8
FY2027	\$4.04B	\$4.09B / \$3.99B	\$4.05	\$4.19 / \$3.92	9
FY2028	\$4.20B	\$4.28B / \$4.15B	\$4.40	\$4.59 / \$4.25	4

30 STREET TARGETS & THIRD-PARTY RATING live targets + composite

Street Price Target — Trajectory

WINDOW	AVG TARGET	VS. PRICE	# TARGETS
Last Quarter	\$73.00	+23.3%	2
Last Year	\$75.20	+27.0%	15
All Time	\$78.78	+33.0%	27

Rolling mean of published targets vs. last close \$59.22. Aggregated from StreetInsider.

Third-Party Composite Rating



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31 PRICE PERFORMANCE — INDEXED, 12 MO

live prices · benchmark + sector + peer set

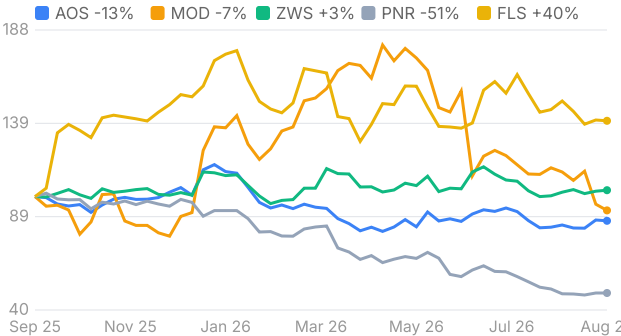
AOS -12.7% vs S&P 500 +15.9% — spread -28.6pp



Sector — XLI +10.7%



Peer Set — indexed to 100



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

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.

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MOVING AVERAGE RIBBON & TREND

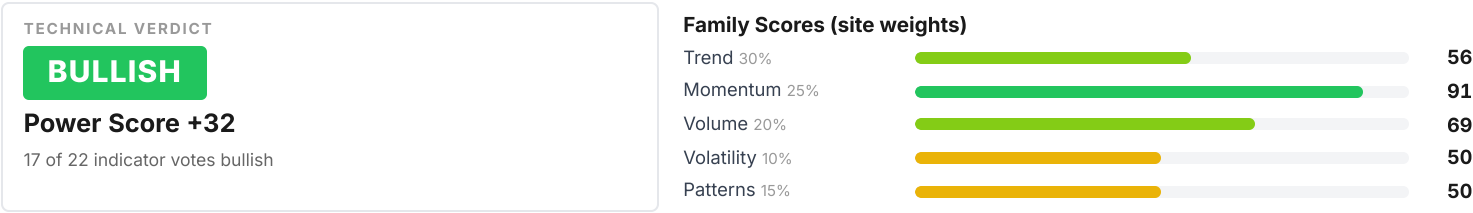
site technicals-tab chart, live indicator history



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

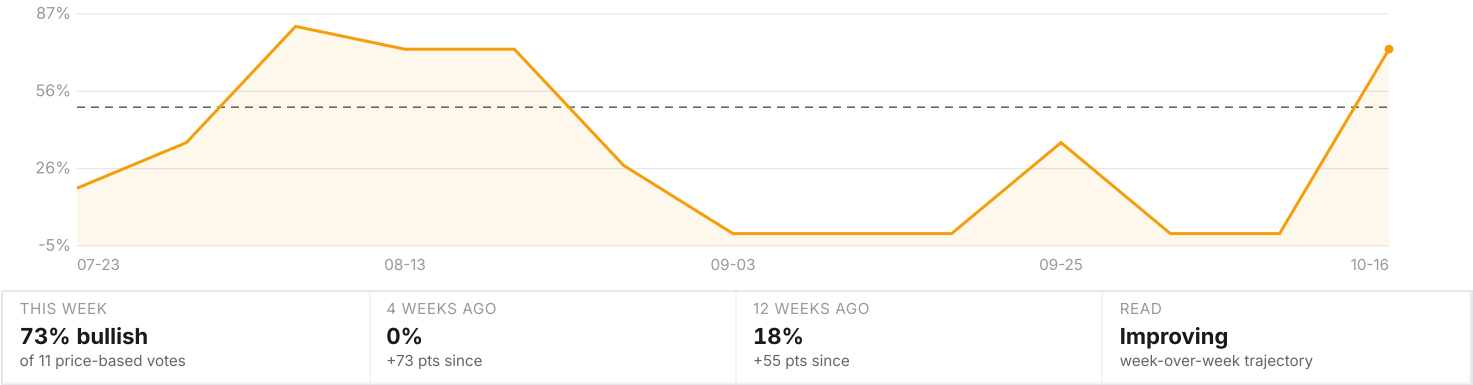
32 TECHNICAL POWER SCORE

EDGE · site engine · 66/100 composite



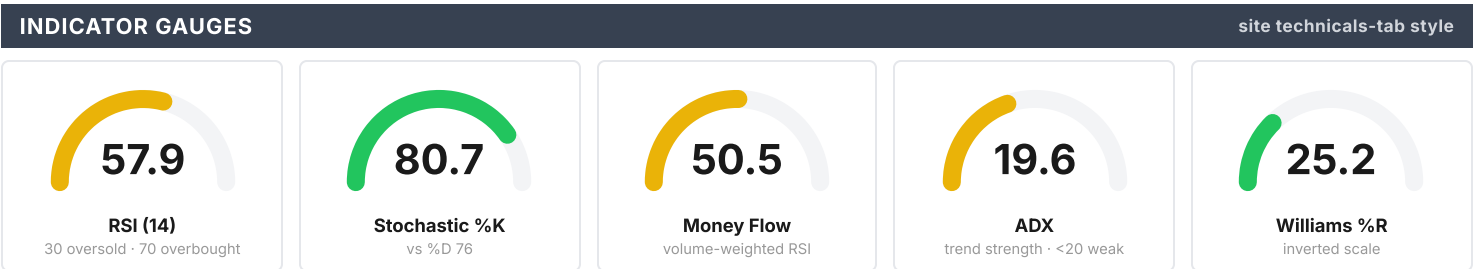
BULLISH — BUT WHICH WAY IS IT TRENDING?

vote share recomputed weekly, 13 weeks



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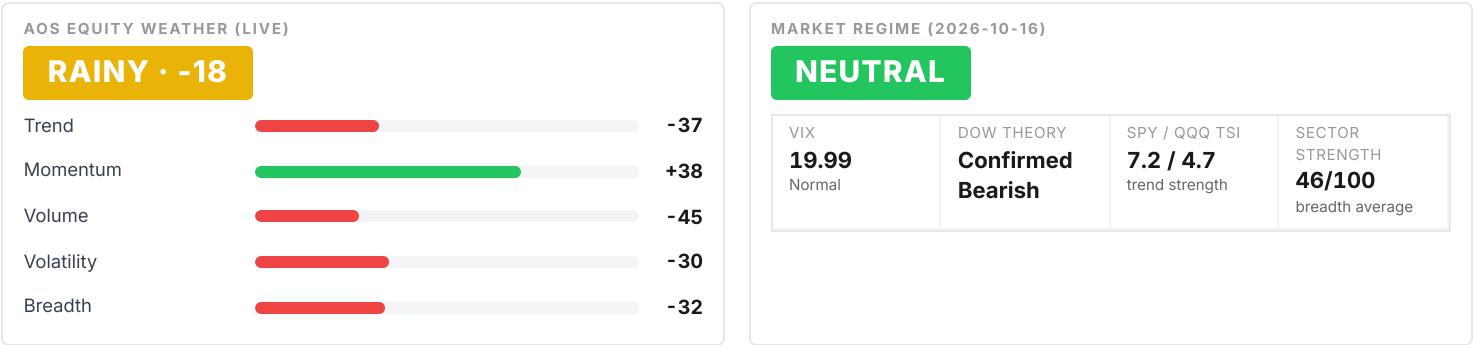
INDICATOR VOTE GRID				17 bull / 5 bear	
● Price vs SMA 20	\$57.43	● Price vs SMA 50	\$59.22	● Price vs SMA 200	\$63.35
● EMA 9/21 Cross	57.9/57.8	● SMA 50/200	Death	● ADX Direction	ADX 20
● Supertrend	\$60	● Parabolic SAR	\$55	● SMA Slope	0.110
● RSI	57.9	● Stochastic K/D	81/76	● StochRSI K/D	97/94
● Williams %R	-25	● CCI	173	● TSI vs Signal	-3.4
● CMO	15.7	● ROC	4.35%	● OBV Signal	Distrib
● Chaikin MF	0.010	● MFI	50	● Force Index	0M
● Elder Ray Bull	3.04				



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36 EQUITY WEATHER & MARKET REGIME

EDGE · live weather engine



37 NEWS SENTIMENT — WEEKLY

live Glauxie-scored feed



38 WEATHER - COMPANY VS INDUSTRY, SECTOR, UNIVERSE

EDGE · live weather engine · Rainy

OVERALL	TREND	MOMENTUM	VOLUME
-18.3	-36.8	+37.7	-45.1
+8.3 vs industry	-5.2 vs industry	+69.0 vs industry	-27.7 vs industry

READING	AOS	INDUSTRIAL - MACHINERY N=1,754	INDUSTRIALS N=9,922	ALL US SYMBOLS N=70,435
Overall	-18.3	-26.7	-24.1	-20.5
Trend	-36.8	-31.6	-26.2	-21.3
Momentum	+37.7	-31.2	-24.5	-15.8
Volume	-45.1	-17.4	-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

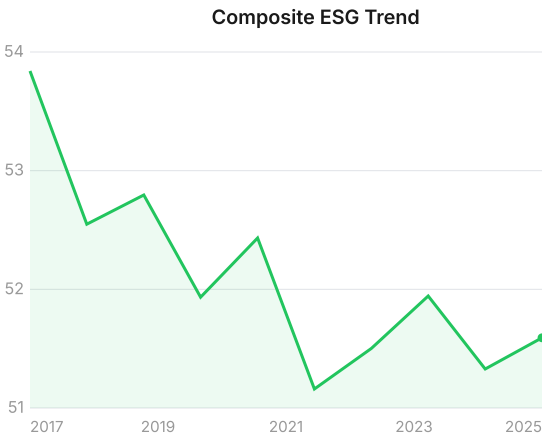
EXECUTIVE	TOTAL COMP	STRUCTURE
Kevin J. Wheeler Executive Chairman	\$8.5M	83% equity+incentive
Stephen M. Shafer President and Chief Execut	\$5.0M	76% equity+incentive
James F. Stern Executive Vice President, Cor	\$2.9M	54% equity+incentive
Charles T. Lauber Executive Vice President a	\$2.8M	71% equity+incentive
Ming Cheng Senior Vice President and Chief T	\$2.5M	76% equity+incentive

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40 ESG ASSESSMENT

live disclosure-derived scores

PILLAR (LIVE DISCLOSURE SCORES)	SCORE
Environmental	46
Social	48
Governance	60
Composite ESG	51



41 8-K MATERIAL EVENTS

live EDGAR feed

FILED	8-K CONTENTS	ITEMS
2026-07-30	Earnings Release; Exhibits	2.02,9.01
2026-06-22	Officer/Director Change; Exhibits	5.02,9.01
2026-05-19	Officer/Director Change; Exhibits	5.02,9.01
2026-04-30	Earnings Release; Exhibits	2.02,9.01
2026-04-17	Shareholder Vote; Other Events	5.07,8.01
2026-01-29	Results of Operations and Financial Condition; Financial Statements an	2.02,9.01
2026-01-06	Creation of Direct Financial Obligation; Other Events; Financial State	2.03,8.01,9.01
2025-11-12	Other Events; Financial Statements and Exhibits	8.01,9.01

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

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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 · 2020-10-29 to 2026-07-30	
Analyst estimates	dim/forward_estimates	3 rows · 2026-12-31 to 2028-12-31	
Institutional ownership (13F)	holdings_db.institutional_ownership_summary	114 rows · 1998 to 2026	
Insider transactions (Form 4)	edgar/form4	11 rows · 2026-03-04 to 2026-07-01	
Proposed sales (Form 144)	edgar/form144	1 record	
Beneficial ownership (13D/G)	edgar/13dg	4 rows · 2026-02-09 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.