

IDEX Corporation (IEX)

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
\$235.55	\$17.4B	\$243.80	33.8	44.7%	13%	7/9	+44.7%
2026-10-16	VOLUME	52-WK LOW	P/S	NET MARGIN	ROIC	ALTMAN Z	5-YR RETURN
	0.7M	\$160.60	4.84	14.5%	9%	5.6	+56.5%

IDEX Corporation is an international enterprise specializing in engineered solutions across diverse sectors. The company operates through three primary business units: Fluid & Metering Technologies (FMT), Health & Science Technologies (HST), and Fire & Safety/Diversified Products (FSDP). The FMT division is responsible for the design, production, and distribution of a range of fluid-handling equipment, including positive displacement pumps, flow meters, and injectors, alongside offering flow monitoring and related services. Its applications span the food, chemical, general industrial, water management, agricultural, and energy industries. Under the HST umbrella, IDEX develops and supplies precision components and systems for health and scientific applications. This includes advanced fluidic devices, various types of pumps (rotary lobe, centrifugal, positive displacement), roll compaction and drying technologies, pneumatic components, and sealing solutions, as well as biocompatible medical devices, optical components, and precision photonic solutions. Key markets for this segment encompass food and beverage, pharmaceutical, cosmetics, marine, chemical, wastewater treatment, life sciences, research, and defense. Finally, the FSDP segment delivers critical equipment for emergency services, such as firefighting pumps, valves, rescue tools, and lifting bags. It also provides engineered stainless steel banding and clamping devices for industrial and commercial use, alongside specialized precision equipment for dispensing, metering, and mixing colorants and paints for retail and commercial clients. IDEX Corporation was founded in 1987 and maintains its headquarters in Northbrook, Illinois.

SECTOR Industrials INDUSTRY Industrial - Machinery EXCHANGE NYSE MARKET CAP \$17.4B EMPLOYEES 8,700 (SEC-filed) CEO Eric D. Ashleman IPO 1989-06-02
COUNTRY US
3100 Sanders Road, Northbrook, IL 60062 · Tel 847 498 7070 · [idexcorp.com](https://www.idexcorp.com)

1 INSIDERSTREET SCORE

INSIDERSTREET SCORE

67 / 100

Street mean \$261.43 (7 analysts, last qtr) — their number, not ours

INSIDER CONSENSUS SIGNAL

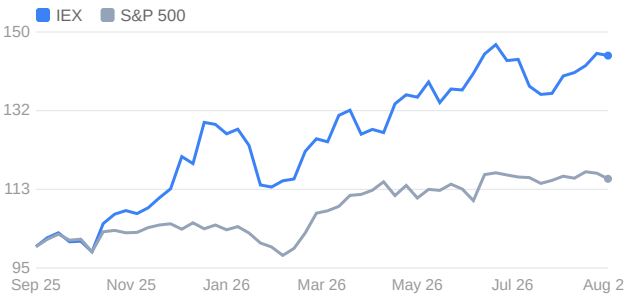
ROUTINE SELLING — LOW SIGNAL

\$3M sold / 6 mo, zero open-market buys

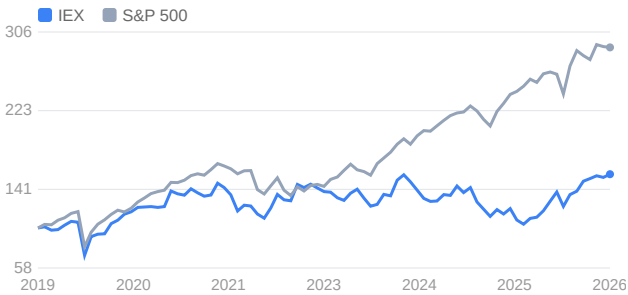
2 PRICE AND VOLUME

adjusted close, prod data layer

1 Year vs S&P 500 · IEX +44.7% · S&P 500 +15.9% · spread +28.8pp



7 Years vs S&P 500 · IEX +56.5% · S&P 500 +189.9% · spread -133.4pp



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
67
OF 100

Score Breakdown

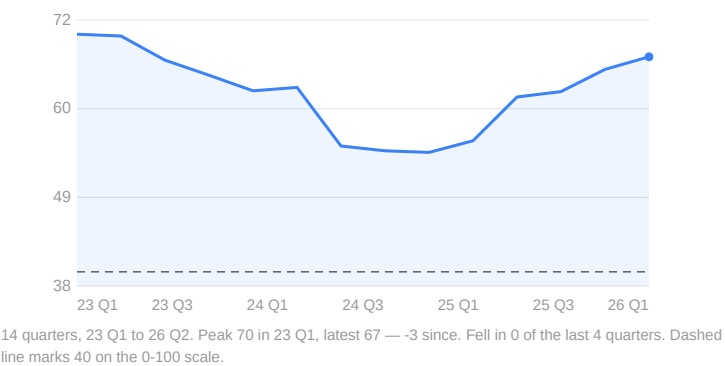
Profitability	57/100
Growth	52/100
Momentum	81/100
Quality	81/100
Earnings Quality	79/100
Balance Sheet	75/100
Value	54/100
Risk (safety)	100/100
Overall	67.0/100

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
ITT	50
NDSN	75
GCG	76
XYL	60
LII	58
WTS	73
IEX	67

IS Score Trend — quarterly



4 TWO READINGS business vs price

BUSINESS QUALITY

67 / 100

IS Score 67.0 / 100 · -2.8 from peak of 70

Quarter	Business Quality
23 Q1	70
23 Q4	63
24 Q3	53
25 Q2	62
26 Q1	67

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

PRICE STRUCTURE

BULLISH

Technical Score 86 / 100 · Power +73 · 20 of 22 indicator votes bullish

Date	Price Structure
07-23	44%
08-13	105%
09-03	13%
09-25	86%
10-16	105%

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 67 and price structure at 86 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 67.0	would move us up one band
IS Score stops falling - one quarter higher than the prior	last four: 62 → 63 → 65 → 67	the direction matters more than the level
Technical vote share back above 50%	now 100%	price structure no longer broken
Institutional holder count rises two quarters running	peak 689 → now 689	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.

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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.

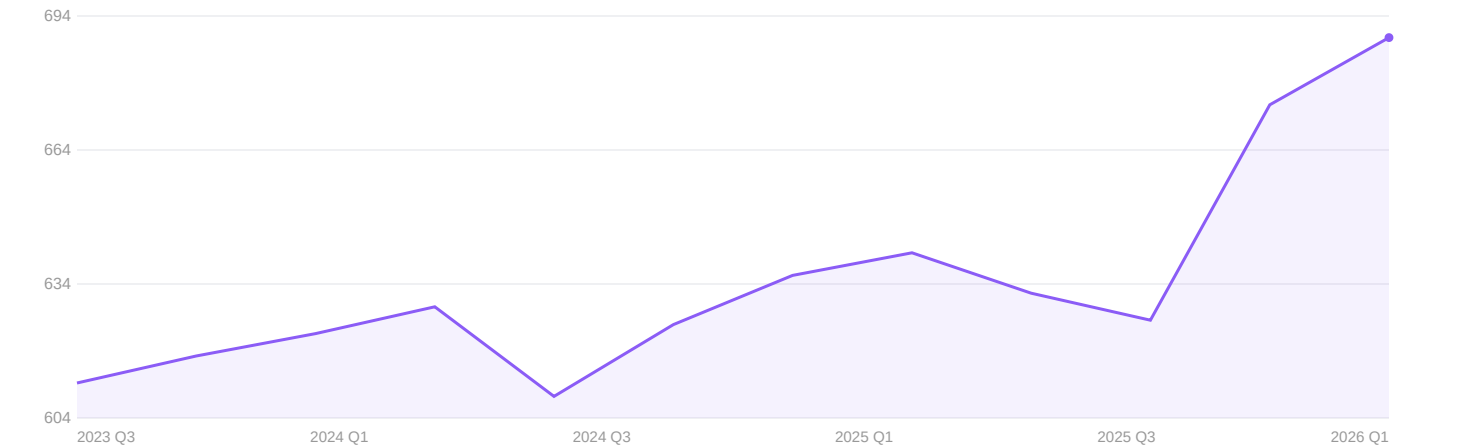
6 SMART MONEY CONFLUENCE EDGE · disclosure sources

SITE CONVERGENCE SCORE 2 of 4 top 13% 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) 897 up / 817 down net +80 funds	INSTITUTIONS ADDED (13F) 15 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 689 · latest 689 (+0 from peak).

QUARTER	HOLDERS	13F SHARES	VALUE	REPORTED OWN%	GUARD
2026 Q2	689	75.7M	\$16.9B	102.2%	ex-outlier 94.5%
2026 Q1	674	74.9M	\$13.9B	101.2%	ex-outlier 93.5%
2025 Q4	626	77.1M	\$13.3B	104.2%	
2025 Q3	632	75.5M	\$11.9B	102.1%	
2025 Q2	641	77.1M	\$12.6B	104.2%	
2025 Q1	636	75.2M	\$12.7B	101.6%	
2024 Q4	625	74.9M	\$14.3B	101.3%	
2024 Q3	609	74.0M	\$14.5B	100.0%	
2024 Q2	629	73.8M	\$13.3B	99.7%	
2024 Q1	623	73.0M	\$15.4B	98.7%	
2023 Q4	618	74.0M	\$14.1B	100.0%	
2023 Q3	612	73.9M	\$13.6B	99.9%	

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 102.24%. Institutions cannot hold more of a company than exists. The reported 75.7M shares exceed the 74.0M outstanding, and a single filer accounts for the excess: **BlackRock, Inc.** reports 5,734,272 shares against 5,676,192 the prior quarter, a 1x jump, which alone would be 7.7% of the company. Excluding that filing, ownership is 94.5%. 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.

Why 2026-03 reads 101.17%. Institutions cannot hold more of a company than exists. The reported 74.9M shares exceed the 74.0M outstanding, and a single filer accounts for the excess: **BlackRock, Inc.** reports 5,676,192 shares against 5,686,058 the prior quarter, a 1x jump, which alone would be 7.7% 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.

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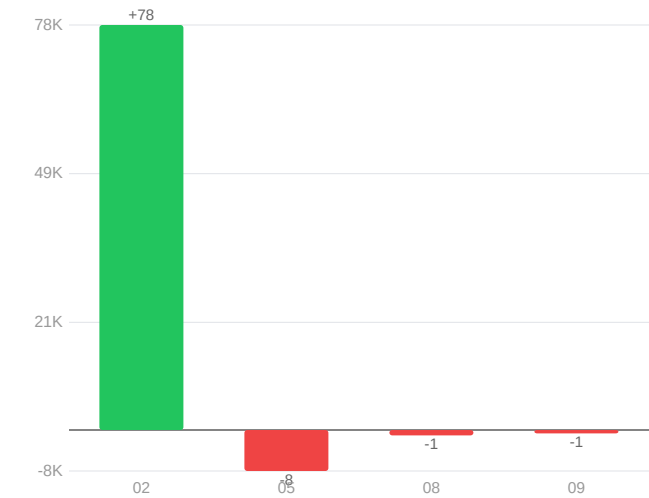
8 INSIDER ACTIVITY live Form 4 data

INSIDER	ROLE	DATE	TYPE	SHARES	VALUE	POST-TXN OWNED
Tereso Tara M.	Group Executive, HST	2026-09-16	TAX W/H	290	\$0.06M	5,408
Simmons William L.	Group Executive, FMT & FSDP	2026-09-16	TAX W/H	218	\$0.05M	2,674
Tereso Tara M.	Group Executive, HST	2026-09-11	TAX W/H	138	\$0.03M	5,698
Lausas Allison S	VP, Chief Accounting Officer	2026-08-29	TAX W/H	645	\$0.15M	3,302
Anderson Lisa M	SVP, GC, CAO & Corp Sec	2026-08-12	EXERCISE	385	\$0.04M	4,712
Anderson Lisa M	SVP, GC, CAO & Corp Sec	2026-08-12	SELL	385	\$0.09M	4,327
Anderson Lisa M	SVP, GC, CAO & Corp Sec	2026-08-12	EXERCISE	385	\$0.04M	0
Ashleman Eric D	director, CEO and President	2026-05-11	EXERCISE	15,385	\$1.43M	82,043

9 SELL DECOMPOSITION — ROUTINE VS. DISCRETIONARY EDGE

6-MO DECOMPOSITION (FORM 4)	TXNS	SHARES	VALUE	SIGNAL WEIGHT
S — Open-market sales	3	15,770	\$3.4M	Counted
M — Exercises (paired A/D)	2	15,770	\$1.5M	None — mechanics
F — Tax withholding	4	1,291	\$0.3M	None — compensation
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	\$3.4M 3 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
2026-08-12	Lisa Anderson	385	\$0.1M
2026-03-04	Roopa Unnikrishnan	4,309	\$0.9M
2026-02-06	Melissa Flores	14,150	\$0.7M
Trailing 12 mo	3 filings	18,844	\$2M

11 13D / 13G STAKES COND

FILED	FORM	REPORTING PERSON	% OF CLASS	SHARES
2026-05-15	SCHEDULE 13G/A	Wellington Investment Advisors Holdings LLP	2.30%	1.7M sh
2026-04-30	SCHEDULE 13G	Vanguard Capital Management	7.53%	5.6M sh
2026-03-27	SCHEDULE 13G/A	The Vanguard Group	—	exit/reporting change
2025-08-12	SCHEDULE 13G/A	Wellington Management Company LLP	8.00%	6.3M sh

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12 CONGRESSIONAL TRADING					EDGE · STOCK Act
MEMBER	CHAMBER	TRADE	SIZE BAND	TRADED	DISCLOSED
Lisa C. McClain	House	SELL	\$1,001 - \$15,000	2025-10-30	2025-11-24
Lisa McClain	House	BUY	\$1,001 - \$15,000	2025-08-04	2025-09-15
Lisa C. McClain	House	BUY	\$1,001 - \$15,000	2025-08-03	2025-09-15
Tommy Tuberville	Senate	SELL	\$1,001 - \$15,000	2024-04-03	2024-05-15
Tommy Tuberville	Senate	SELL	\$1,001 - \$15,000	2024-04-03	2024-05-14
Thomas Hawley Tuberville	Senate	SELL	\$1,001 - \$15,000	2024-04-03	2024-05-14
HOUSE 12-MO 1 trades 0 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) 674	13F SHARES 75M 101.2% of shares out	NEW / CLOSED 113 / 53 positions, QoQ	INCREASED / REDUCED 230 / 208 positions, QoQ	
PUT/CALL (13F) 0.57 option positions	FREE FLOAT 99.7% 74M sh			

2.8 · Largest Reporting 13F Managers

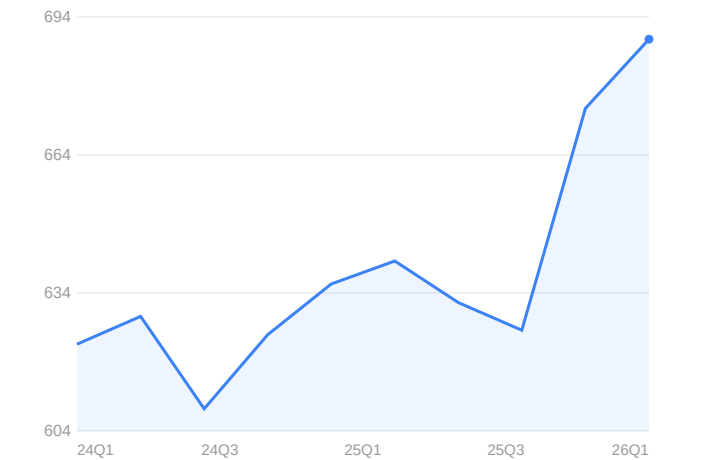
MANAGER	SHARES	VALUE
Fenimore Asset Management Inc	772,862	\$176M
Deprince Race & Zollo Inc	272,218	\$62M
Asr Vermogensbeheer N.V.	170,156	\$39M
Fjarde Ap-Fonden /Fourth Swedish N	50,430	\$11M
Wealth Enhancement Advisory Servic	22,130	\$5M
Vontobel Holding Ltd.	21,984	\$5M

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

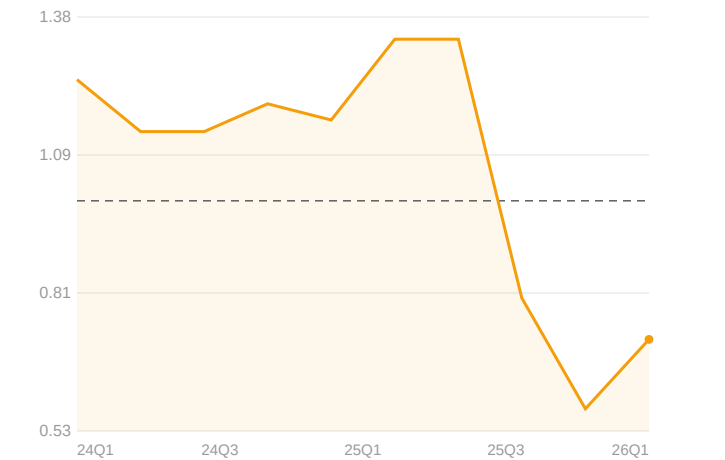
2.9 · Top ETF & Fund Ownership

FUND	WEIGHT	POSITION
VITSX	0.0%	\$532M
VSMPX	0.0%	\$532M
VTSAX	0.0%	\$532M
VTI	0.0%	\$532M
VFINX	0.0%	\$441M
VFIAX	0.0%	\$441M

13F Filers Holding IEX — quarterly



Institutional Put/Call — quarterly

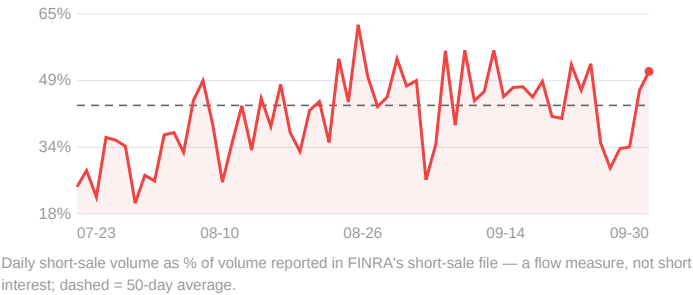


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14 SHORT VOLUME — DAILY, 60 SESSIONS

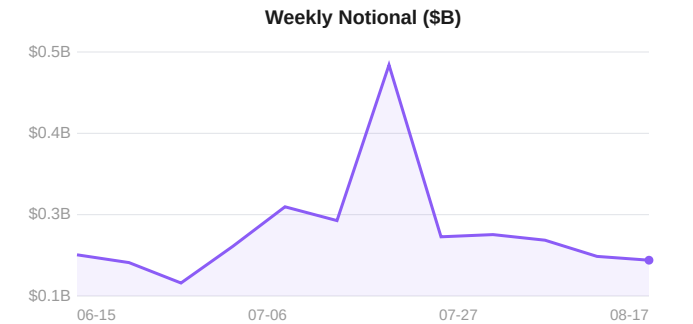
EDGE · live FINRA feed



LATEST SESSION 51.7% 2026-10-15	20-DAY AVG 45.3% 50-day 43.6%	TREND Rising 20d vs 50d	BY MARKET CENTER Q: 52% · N: 60% · B: 26% latest session
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15 DARK POOL ACTIVITY

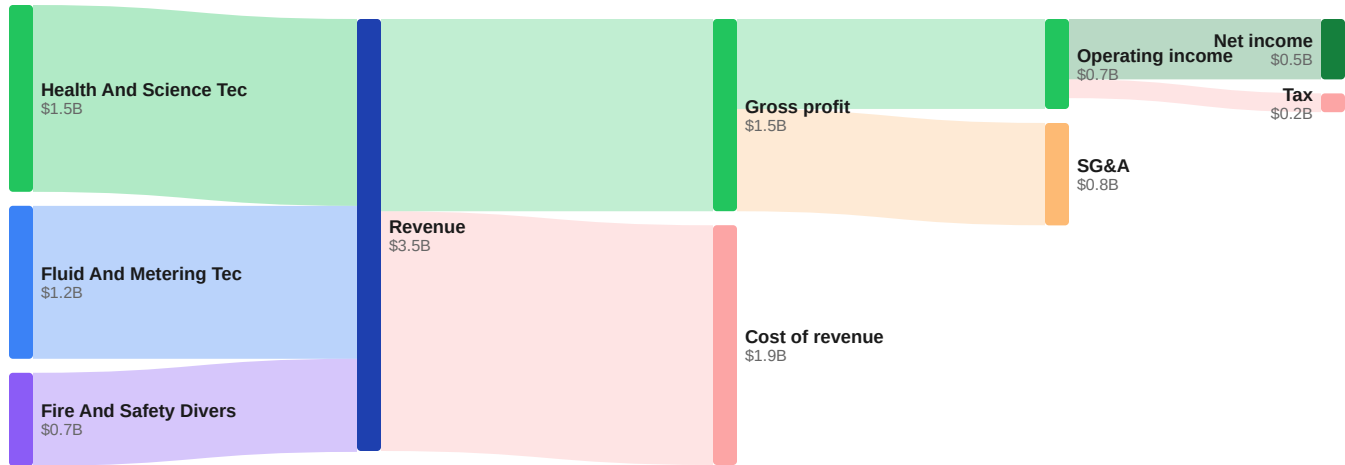
EDGE · live ATS data



Where IEX Trades in the Dark		
ATS VENUE (4-WK)	SHARES	AVG TRADE
Ubsa Ubs Ats	1.3M	50 sh
Sgmt Sigma X2	1.1M	35 sh
Ebxl Level Ats	0.8M	21 sh
Mlix Instinct X	0.7M	55 sh
Cgxs Onechronos	0.6M	60 sh
Bids Bids Ats	0.6M	438 sh

16 REVENUE FLOW — FY2025

live segmentation + income data



Where a dollar of IDEX Corporation revenue goes. All values FY2025 filings, live.

17 GEOGRAPHIC REVENUE

live segmentation

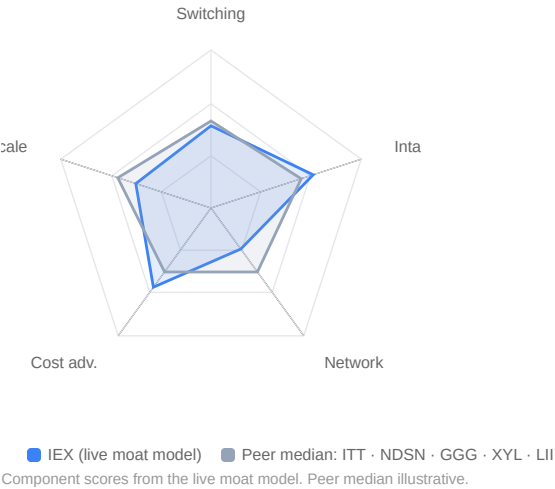
REGION	REVENUE	SHARE
UNITED STATES	\$1.8B	53%
Europe	\$846M	26%
Asia	\$563M	17%
North America, Excluding United States	\$130M	4%

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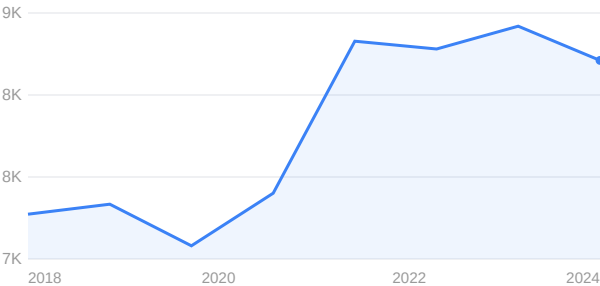
18 MOAT & COMPETITIVE POSITION

LIVE MODEL · 55/100 WEAK

Moat score 55/100 — Weak; primary source Intangible Assets.



3.8 · Employees (SEC filings)



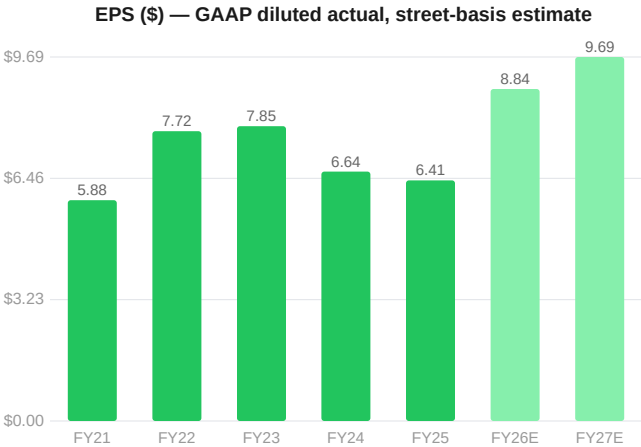
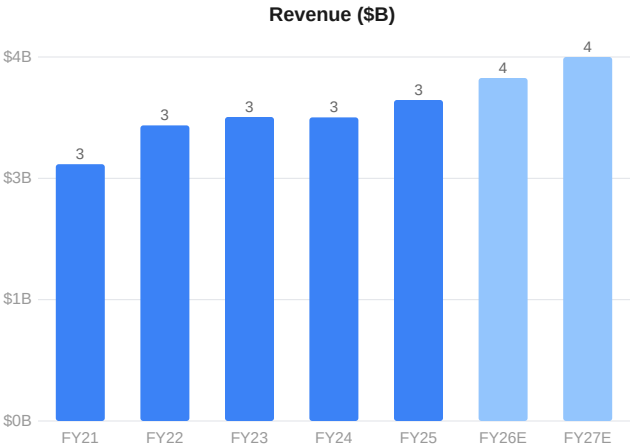
19 CORPORATE INFORMATION — KEY OFFICERS

8,700 employees

OFFICER	TITLE
Eric D. Ashleman	Chief Executive Officer, President & Director
Lisa Anderson	Senior VP, General Counsel, Chief Administrative Officer & Corporate Secretary
Akhil Mahendra	Vice President of Corporate Development
Sean Gillen	Senior Vice President & Chief Financial Officer

20 REVENUE & EPS — HISTORY AND ESTIMATES

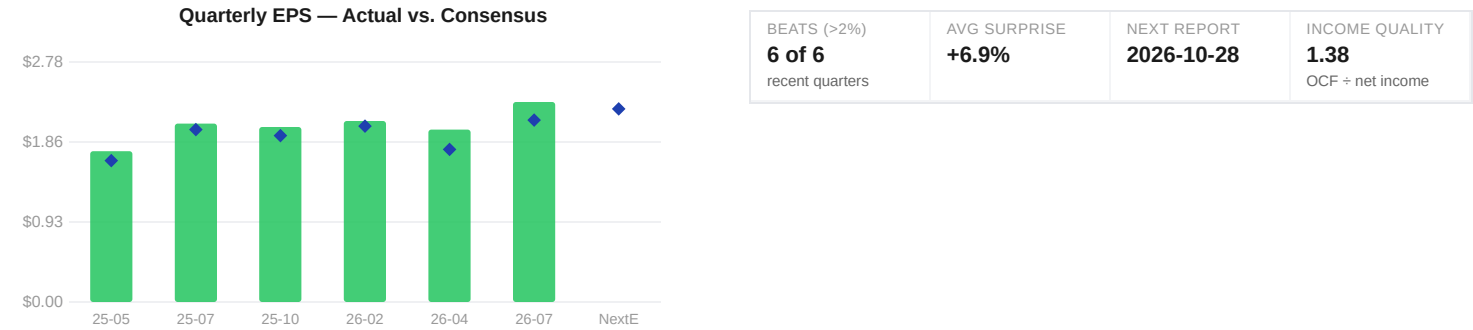
live consensus



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



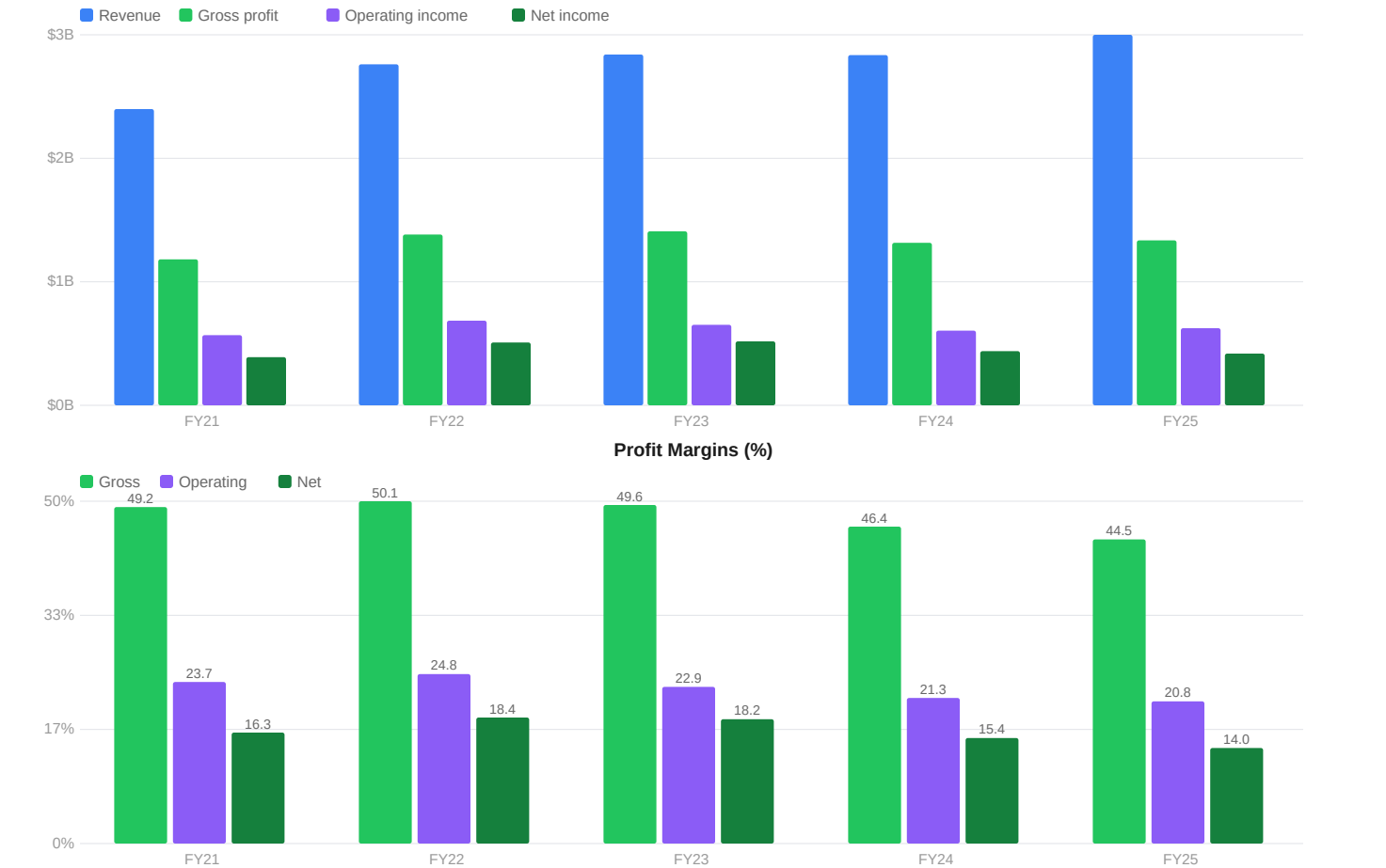
22 REPORTED VS. CONSENSUS — FULL HISTORY 0 quarters · live data

BEAT RATE —% 0 of 0 quarters	CURRENT STREAK 0 longest 0	AVG EPS SURPRISE —% median —%	SURPRISE TREND — last 4 vs prior 4
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PERIOD	EPS EST.	EPS ACTUAL	EPS SURPRISE	REV EST. (\$M)	REV ACTUAL (\$M)	REV SURPRISE
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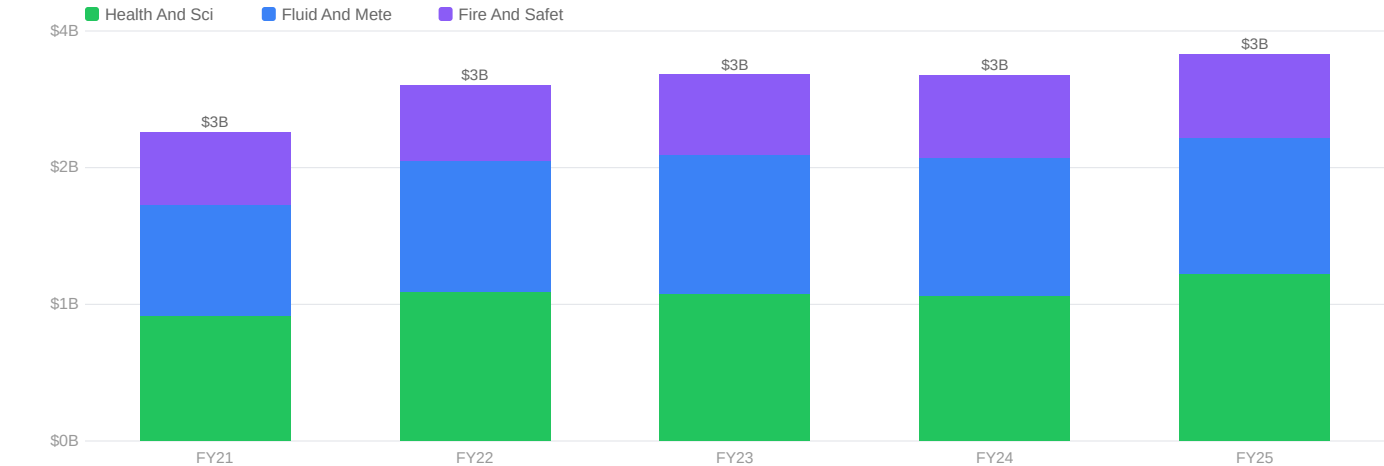
Announcement dates to . Consensus as it stood at each report. Revenue surprise shown where both estimate and actual are filed. A beat record is history, not a forecast.

INCOME TRENDS — 5 YEAR live financials



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Revenue by Segment — Stacked



Live segmentation data.

YoY Growth Heatmap — Income Lines

YOY GROWTH	FY21	FY22	FY23	FY24	FY25
Revenue	+17.6%	+15.1%	+2.9%	-0.2%	+5.8%
Gross profit	+17.6%	+17.1%	+1.8%	-6.5%	+1.5%
Operating income	+21.8%	+20.7%	-4.9%	-7.2%	+3.3%
Net income	+19.0%	+30.6%	+1.6%	-15.3%	-4.3%

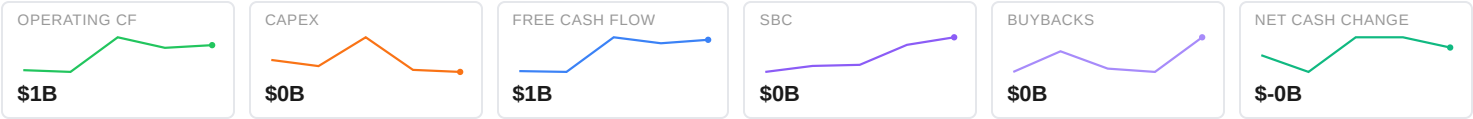
23 INCOME STATEMENT — FULL

live financials

\$B · FY ENDS	FY21	FY22	FY23	FY24	FY25	TREND
Revenue	2.8	3.2	3.3	3.3	3.5	
Cost of revenue	1.4	1.6	1.7	1.8	1.9	
Gross profit	1.4	1.6	1.6	1.5	1.5	
R&D expense	0.1	0.2	0.2	0.2	0.0	
SG&A expense	0.6	0.6	0.7	0.7	0.8	
Operating income	0.7	0.8	0.8	0.7	0.7	
EBITDA	0.7	0.9	1.0	0.9	0.9	
D&A	0.1	0.1	0.2	0.2	0.2	
Pretax income	0.6	0.7	0.8	0.6	0.6	
Income tax	0.1	0.2	0.2	0.1	0.2	
Net income	0.4	0.6	0.6	0.5	0.5	
Diluted EPS (\$)	5.88	7.72	7.85	6.64	6.41	
Diluted shares (M)	76	76	76	76	75	

CASH FLOW TRENDS

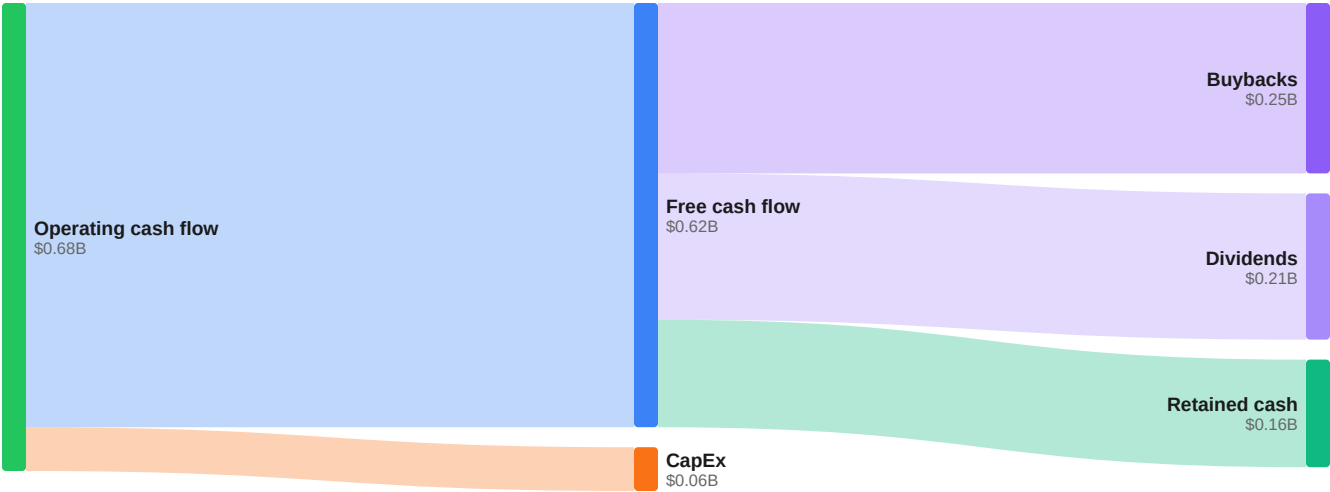
live data



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WHERE THE CASH WENT — FY2025

cash Sankey, live data



Balance Sheet — Full

\$B	FY22	FY23	FY24	FY25	
Cash & equivalents	0.4	0.5	0.6	0.6	
ST investments	0.0	0.0	0.0	0.0	
Receivables (net)	0.4	0.4	0.5	0.5	
Total current assets	1.4	1.4	1.6	1.6	
PP&E (net)	0.4	0.5	0.5	0.5	
Goodwill + intangibles	3.6	3.9	4.5	4.7	
Total assets	5.5	5.9	6.7	6.9	
Accounts payable	0.2	0.2	0.2	0.2	
Short-term debt	0.0	0.0	0.1	0.0	
Deferred revenue	0.0	0.1	0.0	0.0	
Total current liabilities	0.5	0.5	0.6	0.6	
Long-term debt	1.5	1.3	1.9	1.8	
Total liabilities	2.5	2.3	3.0	2.9	
Shareholders' equity	3.0	3.5	3.8	4.0	

Cash Flow Statement — Full

\$B	FY22	FY23	FY24	FY25	
Net income	0.6	0.6	0.5	0.5	
D&A	0.1	0.2	0.2	0.2	
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	0.6	0.7	0.7	0.7	
Capital expenditures	(0.1)	(0.1)	(0.1)	(0.1)	
Investing cash flow	(0.9)	(0.3)	(1.0)	(0.1)	
Buybacks	(0.1)	(0.0)	0.0	(0.2)	
Dividends paid	(0.2)	(0.2)	(0.2)	(0.2)	
Debt issuance / (repay)	0.3	(0.2)	0.7	(0.2)	
Financing cash flow	(0.0)	(0.3)	0.5	(0.6)	
Free cash flow	0.5	0.6	0.6	0.6	

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24 EXPANDED RATIO ANALYSIS (I)

live ratio engine · profitability · valuation

RATIO	FY21	FY22	FY23	FY24	FY25	TTM	TREND
PROFITABILITY							
ROE	16.8%	20.1%	18.1%	13.8%	12.4%	13%	
ROA	9.6%	11.3%	10.5%	8.0%	7.1%	7.5%	
ROIC	16.0%	14.7%	13.2%	10.7%	10.5%	8.9%	
Gross margin	49.2%	50.1%	49.6%	46.4%	44.5%	44.7%	
Operating margin	23.7%	24.8%	22.9%	21.3%	20.8%	20.8%	
Net margin	16.3%	18.4%	18.2%	15.4%	14.0%	14.5%	
EBITDA margin	26.1%	28.6%	29.4%	26.3%	26.1%	26.7%	
FCF margin	17.8%	15.4%	19.1%	18.4%	17.8%	—	
VALUATION							
P/E	38.21	28.38	26.85	30.99	27.55	33.8	
P/B	6.13	5.48	4.52	4.12	3.30	4.3	
P/S	6.21	5.24	4.89	4.79	3.85	4.84	
P/FCF	34.86	34.04	25.53	25.95	21.58	27.1	
EV/EBITDA	24.39	19.58	17.55	19.80	16.10	19.4	
EV/Revenue	6.36	5.60	5.17	5.20	4.21	5.2	
Earnings yield	2.6%	3.5%	3.7%	3.2%	3.6%	2.98%	
FCF yield	2.9%	2.9%	3.9%	3.9%	4.6%	3.69%	

EXPANDED RATIO ANALYSIS (II)

leverage · solvency

RATIO	FY21	FY22	FY23	FY24	FY25	TTM	TREND
LEVERAGE & SOLVENCY							
Current ratio	3.50	2.57	2.89	2.53	2.86	3.05	
Quick ratio	2.72	1.71	2.05	1.85	2.02	2.15	
Debt / equity	0.46	0.52	0.41	0.52	0.45	0.47	
Debt / assets	26.5%	28.8%	24.7%	29.4%	26.3%	27.2%	
Net debt / EBITDA	0.56	1.27	0.95	1.59	1.37	1.32	
Interest coverage	16.35	19.41	15.71	15.37	10.82	—	

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EXPANDED RATIO ANALYSIS (III)							efficiency · growth · per-share · scores
RATIO	FY21	FY22	FY23	FY24	FY25	TTM	TREND
EFFICIENCY							
Asset turnover	0.59	0.61	0.58	0.52	0.51	0.52	
Receivables turnover	8.78	8.25	7.84	7.58	7.11	6.5	
DSO (days)	42	44	47	48	51	56	
DPO (days)	39	41	39	37	40	43	
Cash conversion cycle	81	92	97	95	98	109	
GROWTH (YoY)							
Revenue growth	17.6%	15.1%	2.9%	-0.2%	5.8%	—	
Net income growth	19.0%	30.6%	1.6%	-15.3%	-4.3%	—	
EPS growth	18.8%	31.6%	1.7%	-15.4%	-2.9%	—	
FCF growth	-4.9%	-0.6%	28.1%	-3.8%	2.3%	—	
PER SHARE (\$)							
EPS (diluted, TTM)	5.88	7.73	7.86	6.65	6.46	7.02	
Book value / share	36.64	40.04	46.72	50.00	53.84	54.14	
Revenue / share	36.14	41.92	43.19	43.07	46.22	48.45	
FCF / share	6.44	6.45	8.27	7.94	8.25	8.67	
Cash / share	11.77	5.67	7.05	8.18	7.75	8.40	
SHAREHOLDER RETURN & SCORES							
Buyback yield	0.0%	0.9%	0.2%	0.0%	1.9%	1.80%	
Altman Z-Score	7.03	6.18	6.28	5.05	4.68	5.6	
Piotroski F-Score	6	5	6	3	8	7/9	
Beneish M-Score	-2.35	-2.15	-2.59	-2.38	-2.58	-2.51	

25 EARNINGS QUALITY PANEL				live scores
MODEL	SCORE	ZONE	NOTE	
Piotroski F-Score	7 / 9	Strong		
Altman Z-Score	5.6	Safe (>2.99)	Safe	
Income quality	1.38	Cash-backed	OCF ÷ net income	
Beneish M-Score	-2.51	Non-manipulator	vs -2.22 threshold	

26 DUPONT & GROWTH QUALITY				live analysis engine
DUPONT DECOMPOSITION (TTM)		VALUE	GROWTH QUALITY (LIVE)	VALUE
Tax burden		0.76	Revenue stability	0.83
Interest burden		0.91	Earnings stability	0.09
Operating margin		20.8%	Earnings persistence	0.96
Asset turnover		0.52×	Revenue CAGR 3y	2.5%
Financial leverage		1.72×	EPS CAGR 3y	-3.3%
= ROE		13%	FCF CAGR 3y	4.0%

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SHAREHOLDER RETURN PROFILE

live

BUYBACK YIELD
1.80%

DIVIDEND YIELD
1.23%

TOTAL SHAREHOLDER RETURN
3.04%
cash yield

SBC / REVENUE
0.8%
dilution pressure



28 PEER COMPARISON

live peer engine

COMPANY	MKT CAP	P/E	ROE	NET MARGIN	REV GROWTH	PIOTROSKI	1-YR RET
ITT	\$17.7B	38.8	11%	5.8%	+28.1%	3/9	+16.3%
NDSN	\$18.0B	32.5	18%	18.7%	+7.0%	9/9	+39.4%
GGG	\$13.3B	25.4	21%	24.5%	+4.6%	8/9	+1.9%
XYL	\$24.3B	24.8	9%	11.3%	+4.5%	7/9	-27.9%
LII	\$12.4B	16.1	70%	17.4%	-2.1%	6/9	—
WTS	\$11.9B	31.1	19%	15.5%	+17.1%	8/9	—
CR	\$11.9B	35.5	17%	13.2%	+13.8%	3/9	—
DOV	\$26.4B	23.4	15%	14.3%	+7.6%	7/9	—

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

29 ANALYST CONSENSUS & ESTIMATES

live consensus

Buy

29 Analysts

Str Sell (0)

Sell (0)

Hold (14)

Buy (15)

Str Buy (0)

MEAN TARGET (QTR)
\$261.43
7 targets

TARGET VS. PRICE
+11.0%
last-quarter mean

NEXT REPORT
2026-10-28
street \$2.24

CONSENSUS ESTIMATES	REVENUE MEAN	HIGH / LOW	EPS MEAN	HIGH / LOW	# EPS EST.
FY2026	\$3.69B	\$3.71B / \$3.64B	\$8.84	\$8.93 / \$8.72	9
FY2027	\$3.92B	\$4.01B / \$3.85B	\$9.69	\$10.21 / \$9.30	9
FY2028	\$4.08B	\$4.27B / \$3.87B	\$10.39	\$11.43 / \$9.39	3

30 STREET TARGETS & THIRD-PARTY RATING

live targets + composite

Street Price Target — Trajectory

WINDOW	AVG TARGET	VS. PRICE	# TARGETS
Last Quarter	\$261.43	+11.0%	7
Last Year	\$242.60	+3.0%	25
All Time	\$233.64	-0.8%	42

Rolling mean of published targets vs. last close \$235.55. Aggregated from StreetInsider, Benzinga.

Third-Party Composite Rating

B+

DCF 3/5

ROE 4/5

ROA 4/5

DEBT/EQ 3/5

P/E 2/5

P/B 2/5

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

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31 PRICE PERFORMANCE — INDEXED, 12 MOlive prices · benchmark + sector + peer set



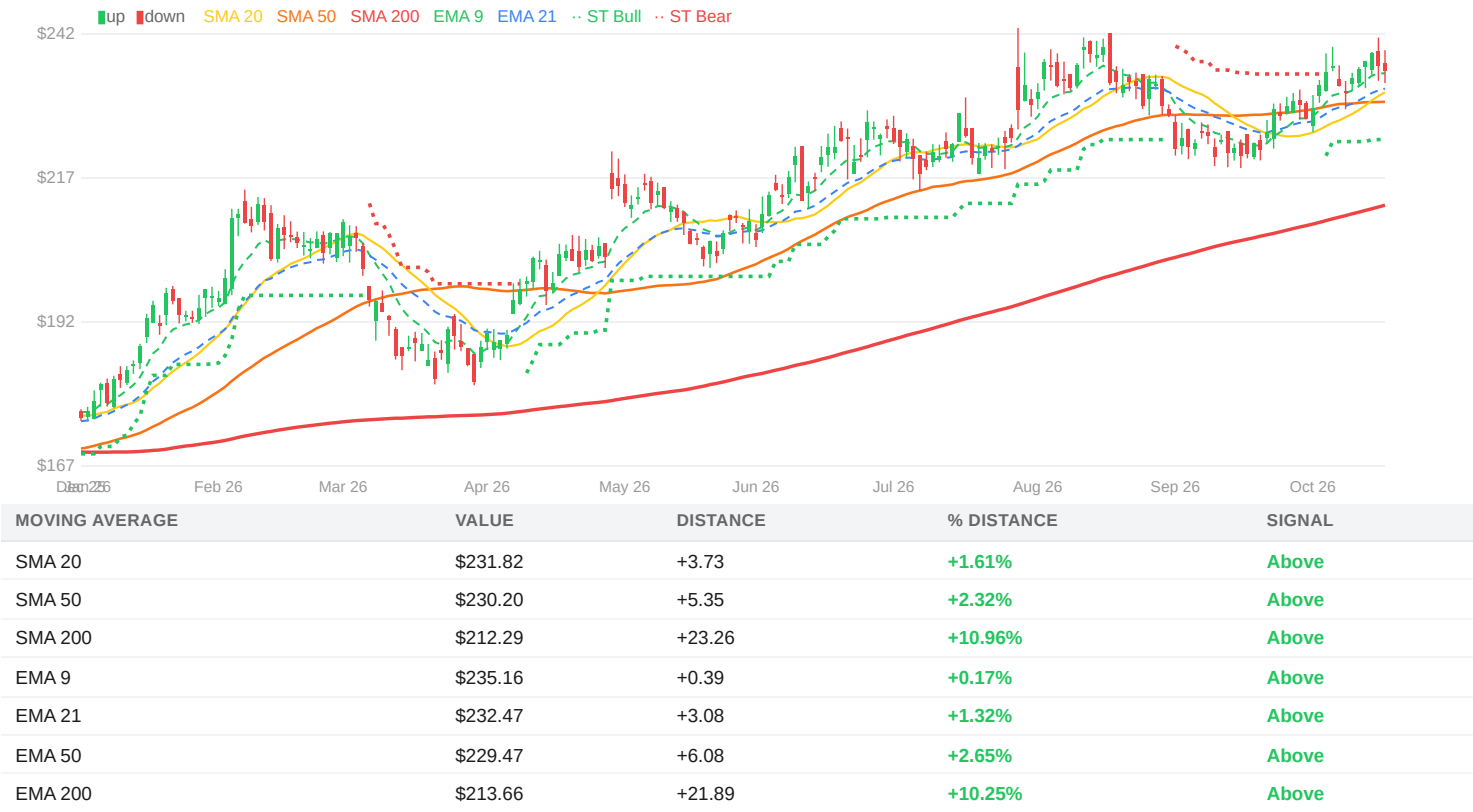
TECHNICAL CHART — 6-MONTH DAILY CANDLES, INDICATORS ONsite chart, print edition



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MOVING AVERAGE RIBBON & TREND

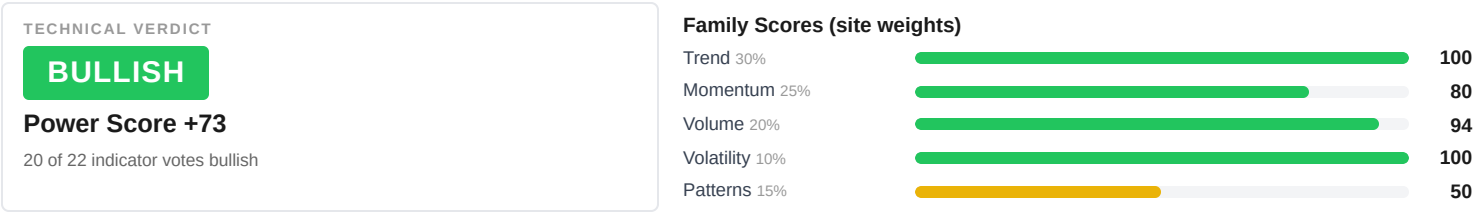
site technicals-tab chart, live indicator history



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

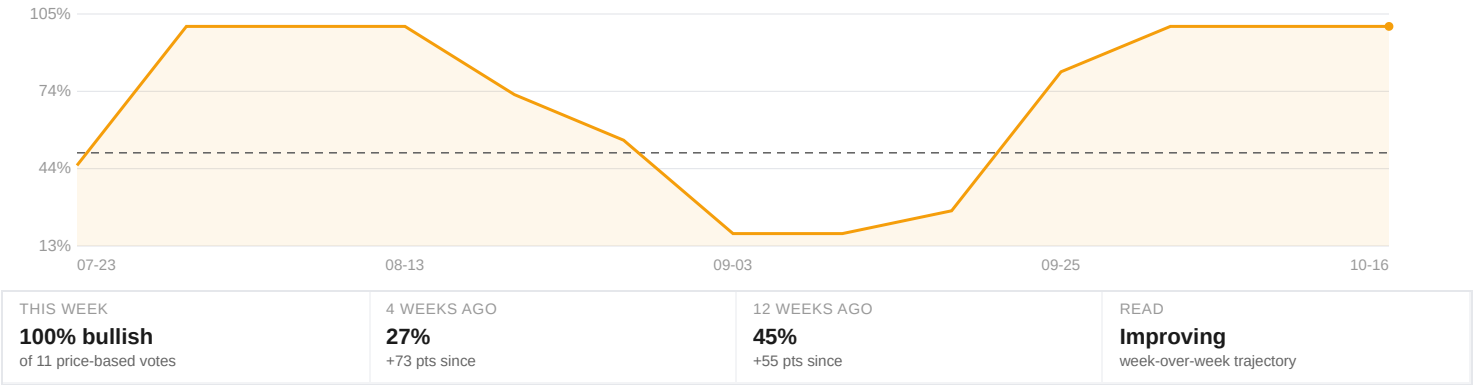
32 TECHNICAL POWER SCORE

EDGE · site engine · 86/100 composite



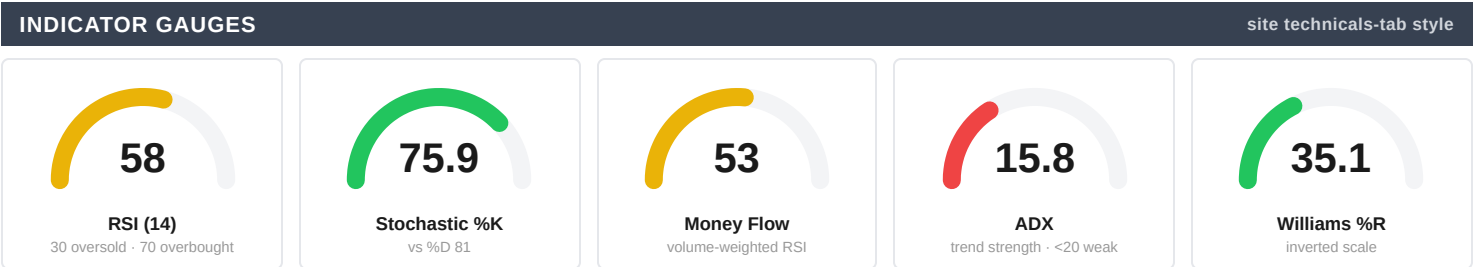
BULLISH — BUT WHICH WAY IS IT TRENDING?

vote share recomputed weekly, 13 weeks



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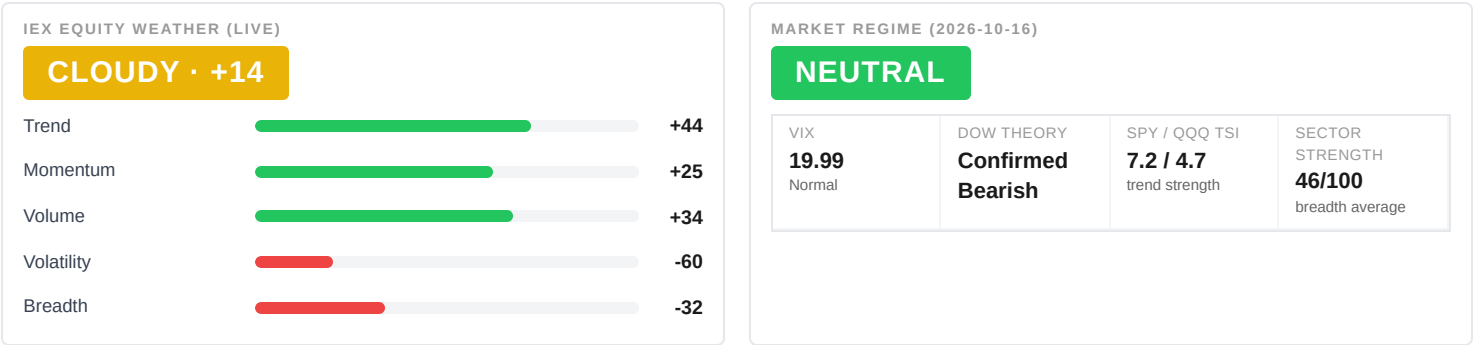
INDICATOR VOTE GRID						20 bull / 2 bear	
● Price vs SMA 20	\$231.82	● Price vs SMA 50	\$230.20	● Price vs SMA 200	\$212.29		
● EMA 9/21 Cross	235.2/232.5	● SMA 50/200	Golden	● ADX Direction	ADX 16		
● Supertrend	\$224	● Parabolic SAR	\$229	● SMA Slope	0.630		
● RSI	58.0	● Stochastic K/D	76/81	● StochRSI K/D	70/80		
● Williams %R	-35	● CCI	78	● TSI vs Signal	18.8		
● CMO	16.0	● ROC	1.10%	● OBV Signal	Accum		
● Chaikin MF	0.030	● MFI	53	● Force Index	0M		
● Elder Ray Bull	6.66						



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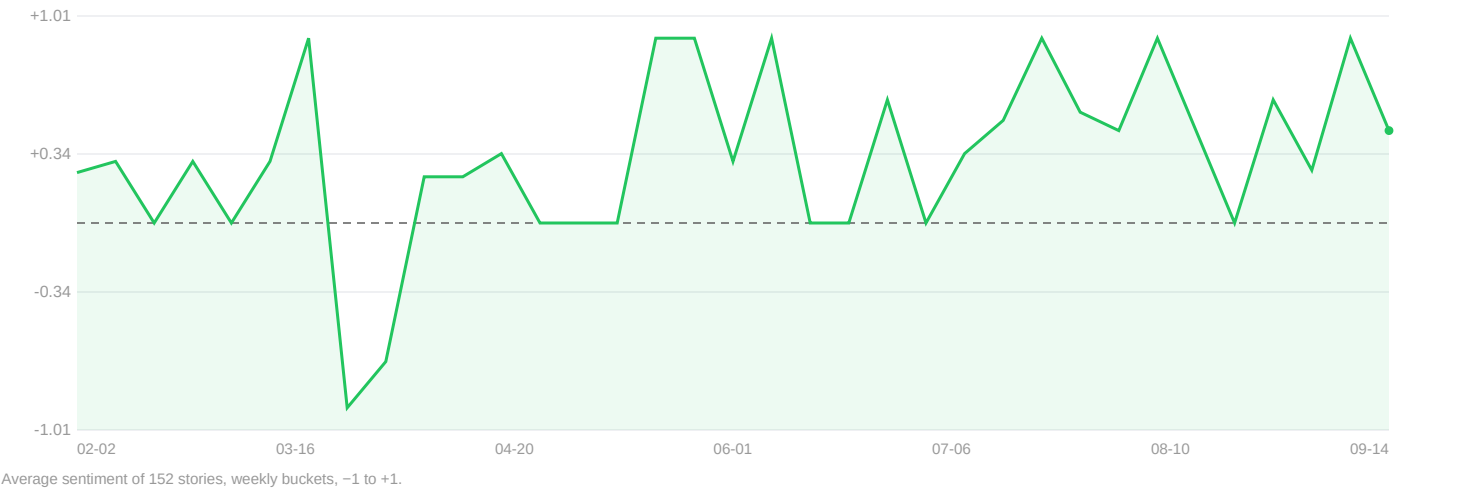
36 EQUITY WEATHER & MARKET REGIME

EDGE · live weather engine



37 NEWS SENTIMENT — WEEKLY

live Glauxie-scored feed



38 WEATHER - COMPANY VS INDUSTRY, SECTOR, UNIVERSE

EDGE · live weather engine · Cloudy

OVERALL +14.0 +40.7 vs industry		TREND +44.0 +75.5 vs industry	MOMENTUM +25.0 +56.2 vs industry	VOLUME +34.0 +51.4 vs industry
READING	IEX	INDUSTRIAL - MACHINERY N=1,754	INDUSTRIALS N=9,922	ALL US SYMBOLS N=70,435
Overall	+14.0	-26.7	-24.1	-20.5
Trend	+44.0	-31.6	-26.2	-21.3
Momentum	+25.0	-31.2	-24.5	-15.8
Volume	+34.0	-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

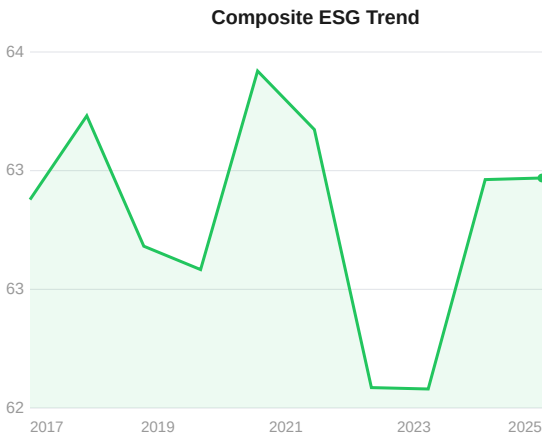
live proxy data · FY2025

EXECUTIVE	TOTAL COMP	STRUCTURE
Eric D. Ashleman, Chief Executive Officer an	\$9.1M	69% equity+incentive
Lisa M. Anderson, Senior Vice President, Gen	\$1.8M	56% equity+incentive
Abhishek Khandelwal, Former Senior Vice Pres	\$1.8M	62% equity+incentive
Roopa Unnikrishnan, Former Senior Vice Presi	\$1.5M	53% equity+incentive
Akhil Mahendra, Interim Chief Financial Offi	\$1.5M	64% equity+incentive

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40 ESG ASSESSMENT live disclosure-derived scores

PILLAR (LIVE DISCLOSURE SCORES)	SCORE
Environmental	64
Social	53
Governance	73
Composite ESG	63



41 8-K MATERIAL EVENTS live EDGAR feed

FILED	8-K CONTENTS	ITEMS
2026-09-03	Material Agreement; Financial Obligation; Exhibits	1.01,2.03,9.01
2026-08-17	Officer/Director Change	5.02
2026-07-29	Earnings Release; Exhibits	2.02,9.01
2026-05-08	Shareholder Vote; Exhibits	5.07,9.01
2026-04-29	Earnings Release; Exhibits	2.02,9.01
2026-02-09	Departure/Election of Directors; Appointment of Officers	5.02
2026-02-04	Results of Operations and Financial Condition; Financial Statements an	2.02,9.01
2025-12-04	Departure/Election of Directors; Appointment of Officers; Regulation F	5.02,7.01,9.01

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 · 2020-10-27 to 2026-07-29	
Analyst estimates	dim/forward_estimates	3 rows · 2026-12-31 to 2028-12-31	
Institutional ownership (13F)	holdings_db.institutional_ownership_summary	113 rows · 1998 to 2026	
Insider transactions (Form 4)	edgar/form4	12 rows · 2026-05-06 to 2026-09-16	
Proposed sales (Form 144)	edgar/form144	1 record	
Beneficial ownership (13D/G)	edgar/13dg	4 rows · 2025-08-12 to 2026-05-15	
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.