# Global Industrial Co.

**GIC**

NYSE; shops; SIC 5084, Wholesale-Industrial Machinery & Equipment; CIK 0000945114

**A**

**strongest fifth of 258 graded peers in shops**

rank 11 of 258; percentile 3.9; sampling error 2.9 points; lower is stronger

A B C D E

**A, the bull**



## Scoreboard

| | |
|---|---|
| **Profitability** | B/C<br>percentile 42.0 |
| **Solvency** | A/B<br>percentile 18.6 |
| **Growth and financing** | B<br>percentile 32.5 |
| **Reliability** | 0.87 AUC<br>filers with $120M to $591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025 |
| **Peer failure rate** | 1.03% a year<br>Item 1.03 bankruptcies, same asset band, 2012 to 2025 |
| **Size band** | $120M to $591M assets<br>total assets $580.8M |
| **Standard universe** | inside<br>revenue above $1M and assets above $10M |
| **Warnings** | none triggered<br>not computable: distress, fortress balance sheet |
| **Inputs computable** | 10 of 14 |
| **Graded from** | filings received through Feb 27, 2026<br>234 days before the rescan; latest periodic filing 10-Q received Aug 4, 2026 |
| **Last close** | $44.18<br>2026-10-16; market equity $1.7B; no price enters the letter |

**Share price, twelve months to the rescan**




*Split-adjusted close. Each lollipop is a rescan and carries the letter held then.*

**Letter at every rescan, 2012 to 2026**




*Sector percentile at each rescan, stronger toward the top; facts filed by each date only.*

## Business, in the company's words

*opening of Item 1 of the 10-K received Feb 27, 2026*

Global Industrial Company, through its operating subsidiaries, is a value-added distributor of industrial equipment and source for industrial equipment and supplies in North America going to market through a system of branded e-commerce websites and relationship marketers. The Company was incorporated in Delaware in 1995. Certain predecessor businesses which now constitute the Company's operations have been in business since 1949. Our headquarters office is located at 11 Harbor Park Drive, Port Washington, New York.

## The fourteen inputs

*lower percentile is stronger; sleeves and inputs within a sleeve carry equal weight*

| Input | Value | Peer median | Percentile, 0 to 100 | Pct | Peers | Period end |
|---|---|---|---|---|---|---|
| **Profitability, sleeve percentile 42.0** | | | | | | |
| Gross profitability | 84.4% | 43.0% | | 11.6 | 242 | 2025-12-31 |
| Return on invested capital | not computable | 10.9% | | | | |

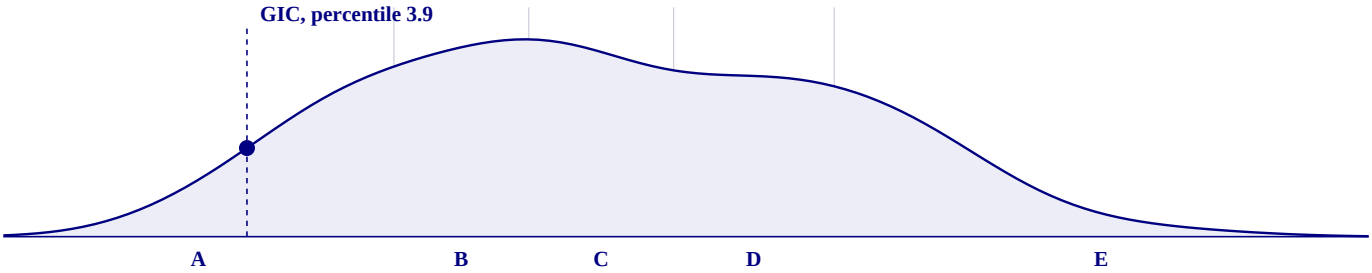
*required facts have no common fiscal period end*

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| | | | | | |
|---|---|---|---|---|---|
| Accruals ratio | (1.0%) | (4.9%) | 84.3 | 288 | 2025-12-31 |
| Gross margin stability, five years | 0.7 pts | 1.2 pts | 30.1 | 220 | 2025-12-31 |
| **Solvency, sleeve percentile 18.6** | | | | | |
| Twelve-month failure probability | not computable | 0.04% | | | |
| *latest liabilities, cash plus short-term investments, book equity, and shares are required* | | | | | |
| Altman Z double-prime | 5.50 | 1.92 | 13.5 | 209 | 2025-12-31 |
| Net debt to EBITDA | not computable | 1.84x | | | |
| *required facts have no common fiscal period end* | | | | | |
| Interest coverage | not computable | 2.26x | | | |
| *latest aligned inputs end 2014-12-31; latest annual assets end 2025-12-31* | | | | | |
| Current ratio | 2.22x | 1.38x | 23.7 | 296 | 2025-12-31 |
| **Growth and financing, sleeve percentile 32.5** | | | | | |
| Revenue growth, three-year compound | 5.8% | 1.5% | 27.6 | 269 | 2025-12-31 |
| Free cash flow growth, three-year compound | 20.4% | 5.6% | 26.7 | 147 | 2025-12-31 |
| Reinvestment rate | 40.6% | 7.3% | 33.1 | 152 | 2025-12-31 |
| Asset growth, three years | 8.5% | 3.1% | 24.4 | 272 | 2025-12-31 |
| Net share issuance, one year | (0.3%) | (0.6%) | 50.7 | 210 | 2026-02-20 |

## Among 258 peers

*shops; letters are fifths of this list*




*Composite score of every graded peer, smoothed; vertical rules are the letter band edges; stronger to the left.*

| Rank | Company | Percentile | Letter | Warnings |
|---|---|---|---|---|
| 6 | Boot Barn Holdings, Inc. (BOOT) | 1.9 | A | |
| 7 | Brinker International, Inc. (EAT) | 2.3 | A | |
| 8 | Fastenal Co. (FAST) | 2.7 | A | fortress balance sheet |
| 9 | DXP Enterprises Inc. (DXPE) | 3.1 | A | |
| 10 | Ross Stores, Inc. (ROST) | 3.5 | A | fortress balance sheet |
| 11 | Global Industrial Co. (GIC) | 3.9 | A | |
| 12 | SiteOne Landscape Supply, Inc. (SITE) | 4.3 | A | |
| 13 | Costco Wholesale Corp. (COST) | 4.7 | A | fortress balance sheet |
| 14 | Tractor Supply Co. (TSCO) | 5.1 | A | fortress balance sheet |
| 15 | Chipotle Mexican Grill Inc. (CMG) | 5.4 | A | fortress balance sheet |
| 16 | W.W. Grainger, Inc. (GWW) | 5.8 | A | |

## What the price implies

*at the 2026-10-16 close; none of these enters the grade*

| Measure | Value | Peer median | Percentile |
|---|---|---|---|
| Twelve-month price change, skipping the latest month | 10.5% | 0.2% | 62 |
| Distance from 52-week high | 0.0% | (20.6%) | 98 |
| EBIT to enterprise value | 6.1% | 5.4% | 58 |
| Free cash flow yield | 4.4% | 4.0% | 54 |
| Book value to price | 0.20 | 0.34 | 36 |
| Sales to price | 0.82 | 1.68 | 30 |

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| | | | |
|---|---|---|---|
| Composite equity issuance, five years | (17.5%) | (16.7%) | 47 |
| Relative strength against the sector, log excess return | 0.12 | 0.03 | 62 |

## Diagnostics

*shown on every report; none enters the grade*

| Measure | Value |
|---|---|
| **Piotroski F-score None of 9, period end 2025-12-31** | |
| Return on assets above zero | pass |
| Operating cash flow above zero | pass |
| Return on assets improved | pass |
| Operating cash flow exceeds net income | pass |
| Long-term leverage fell | fail |
| Current ratio improved | pass |
| No new shares issued | pass |
| Gross margin improved | pass |
| Asset turnover improved | pass |
| **Cash, filings, liquidity** | |
| Cash and equivalents | $86.7M |
| Operating cash flow, four quarters | $90.5M |
| Months of runway | not finite |
| Days since last periodic filing | 76 (10-Q received Aug 4, 2026) |
| Median daily dollar volume, 63 sessions | $5.1M |

## Sources

*every fact behind the inputs; each row links to its filing index on sec.gov*

| # | Concept | XBRL tag | Value | Period end | Received | Form | Accession |
|---|---|---|---|---|---|---|---|
| 1 | gross profit | us-gaap:GrossProfit | $490.2M | 2025-12-31 | 2026-02-27 | 10-K | 26-012945 |
| 2 | assets | us-gaap:Assets | $580.8M | 2025-12-31 | 2026-02-27 | 10-K | 26-012945 |
| 3 | net income | us-gaap:NetIncomeLoss | $72.1M | 2025-12-31 | 2026-02-27 | 10-K | 26-012945 |
| 4 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $77.8M | 2025-12-31 | 2026-02-27 | 10-K | 26-012945 |
| 5 | assets | us-gaap:Assets | $520.7M | 2024-12-31 | 2026-02-27 | 10-K | 26-012945 |
| 6 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $1.4B | 2025-12-31 | 2026-02-27 | 10-K | 26-012945 |
| 7 | gross profit | us-gaap:GrossProfit | $452.0M | 2024-12-31 | 2026-02-27 | 10-K | 26-012945 |
| 8 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $1.3B | 2024-12-31 | 2026-02-27 | 10-K | 26-012945 |
| 9 | gross profit | us-gaap:GrossProfit | $435.8M | 2023-12-31 | 2026-02-27 | 10-K | 26-012945 |
| 10 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $1.3B | 2023-12-31 | 2026-02-27 | 10-K | 26-012945 |
| 11 | gross profit | us-gaap:GrossProfit | $421.2M | 2022-12-31 | 2025-02-26 | 10-K | 25-000012 |
| 12 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $1.2B | 2022-12-31 | 2025-02-26 | 10-K | 25-000012 |
| 13 | gross profit | us-gaap:GrossProfit | $374.3M | 2021-12-31 | 2024-03-12 | 10-K | 24-000016 |
| 14 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $1.1B | 2021-12-31 | 2024-03-12 | 10-K | 24-000016 |
| 15 | current assets | us-gaap:AssetsCurrent | $396.5M | 2025-12-31 | 2026-02-27 | 10-K | 26-012945 |
| 16 | current liabilities | us-gaap:LiabilitiesCurrent | $178.5M | 2025-12-31 | 2026-02-27 | 10-K | 26-012945 |
| 17 | retained earnings | us-gaap:RetainedEarningsAccumulatedDeficit | $120.3M | 2025-12-31 | 2026-02-27 | 10-K | 26-012945 |
| 18 | operating income | us-gaap:OperatingIncomeLoss | $97.6M | 2025-12-31 | 2026-02-27 | 10-K | 26-012945 |
| 19 | book equity | us-gaap:StockholdersEquity | $313.2M | 2025-12-31 | 2026-02-27 | 10-K | 26-012945 |
| 20 | liabilities | us-gaap:Liabilities | $267.6M | 2025-12-31 | 2026-02-27 | 10-K | 26-012945 |
| 21 | operating income | us-gaap:OperatingIncomeLoss | -$13.7M | 2014-12-31 | 2017-03-16 | 10-K | 17-012370 |
| 22 | interest expense | us-gaap:InterestExpense | $1.3M | 2014-12-31 | 2015-03-13 | 10-K | 15-011556 |
| 23 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $3.1M | 2025-12-31 | 2026-02-27 | 10-K | 26-012945 |
| 24 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $50.7M | 2024-12-31 | 2026-02-27 | 10-K | 26-012945 |
| 25 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $3.8M | 2024-12-31 | 2026-02-27 | 10-K | 26-012945 |
| 26 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $112.0M | 2023-12-31 | 2026-02-27 | 10-K | 26-012945 |
| 27 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $3.9M | 2023-12-31 | 2026-02-27 | 10-K | 26-012945 |
| 28 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $50.2M | 2022-12-31 | 2025-02-26 | 10-K | 25-000012 |
| 29 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $7.4M | 2022-12-31 | 2025-02-26 | 10-K | 25-000012 |

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| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| 30 | depreciation amortization | us-gaap:DepreciationDepletionAndAmortization | $7.7M | 2025-12-31 | 2026-02-27 | 10-K | 26-012945 |
| 31 | pretax income | us-gaap:IncomeLossFromContinuingOperationsBeforeInc... | $97.6M | 2025-12-31 | 2026-02-27 | 10-K | 26-012945 |
| 32 | income tax | us-gaap:IncomeTaxExpenseBenefit | $25.6M | 2025-12-31 | 2026-02-27 | 10-K | 26-012945 |
| 33 | current assets | us-gaap:AssetsCurrent | $352.6M | 2024-12-31 | 2026-02-27 | 10-K | 26-012945 |
| 34 | current liabilities | us-gaap:LiabilitiesCurrent | $168.4M | 2024-12-31 | 2026-02-27 | 10-K | 26-012945 |
| 35 | assets | us-gaap:Assets | $513.4M | 2023-12-31 | 2025-02-26 | 10-K | 25-000012 |
| 36 | assets | us-gaap:Assets | $455.2M | 2022-12-31 | 2024-03-12 | 10-K | 24-000016 |
| 37 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 38,196,742 | 2026-02-20 | 2026-02-27 | 10-K | 26-012945 |
| 38 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 38,311,253 | 2025-02-20 | 2025-02-26 | 10-K | 25-000012 |

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