# Genuine Parts Co.

**GPC**

NYSE; shops; SIC 5013, Wholesale-Motor Vehicle Supplies & New Parts; CIK 0000040987

**C/D**

**on the C/D boundary of 258 graded peers in shops**

rank 158 of 258; percentile 61.1; sampling error 2.9 points; lower is stronger

A B C D E

**C/D, the tortoise**



## Scoreboard

| | |
|---|---|
| **Profitability** | C<br>percentile 44.7 |
| **Solvency** | D<br>percentile 67.1 |
| **Growth and financing** | C<br>percentile 50.5 |
| **Reliability** | 0.94 AUC<br>filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025 |
| **Peer failure rate** | 0.52% a year<br>Item 1.03 bankruptcies, same asset band, 2012 to 2025 |
| **Size band** | over $2.67B assets<br>total assets $20.8B |
| **Standard universe** | inside<br>revenue above $1M and assets above $10M |
| **Warnings** | none triggered<br>not computable: short runway, distress |
| **Inputs computable** | 8 of 14 |
| **Graded from** | filings received through Feb 20, 2026<br>241 days before the rescan; latest periodic filing 10-Q received Jul 21, 2026 |
| **Last close** | $133.91<br>2026-10-16; market equity $18.5B; 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 20, 2026*

Incorporated in the State of Georgia in 1928, Genuine Parts Company is a leading global service provider of automotive and industrial replacement parts and value-added solutions. We serve our customers from more than 10,800 locations, primarily in North America, Europe, and Australasia (primarily Australia and New Zealand). We offer outstanding service, an industry-leading assortment of replacement parts, extensive supply chain and distribution capabilities, and enhanced technology solutions.

## The fourteen inputs

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

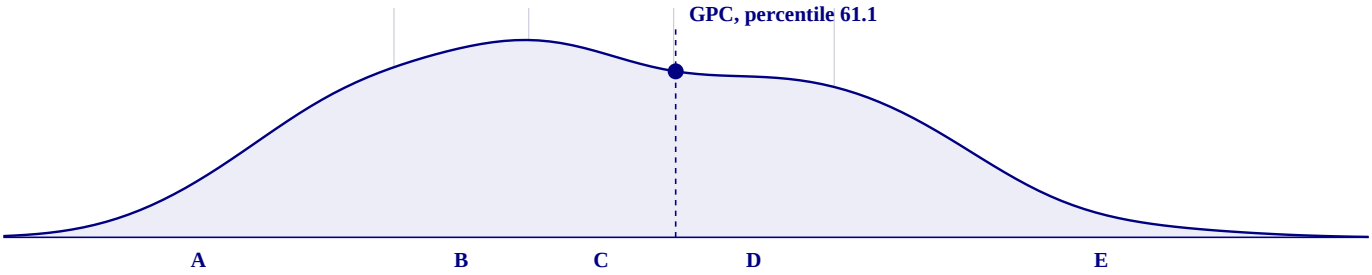
| Input | Value | Peer median | Percentile, 0 to 100 | Pct | Peers | Period end |
|---|---|---|---|---|---|---|
| **Profitability, sleeve percentile 44.7** | | | | | | |
| Gross profitability | 43.0% | 43.0% | | 48.5 | 242 | 2025-12-31 |
| Return on invested capital | not computable | 10.9% | | | | |
| *latest aligned inputs end 2018-12-31; latest annual assets end 2025-12-31* | | | | | | |
| Accruals ratio | (4.1%) | (4.9%) | | 61.7 | 288 | 2025-12-31 |

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| | | | | | |
|---|---|---|---|---|---|
| Gross margin stability, five years | 0.7 pts | 1.2 pts | 23.7 | 220 | 2025-12-31 |
| **Solvency, sleeve percentile 67.1** | | | | | |
| Twelve-month failure probability | not computable | 0.04% | | | |
| *liabilities and a nearby cover-page share count are required at 2026-06-30* | | | | | |
| Altman Z double-prime | not computable | 1.92 | | | |
| *one or more required annual facts are missing* | | | | | |
| Net debt to EBITDA | not computable | 1.84x | | | |
| *latest aligned inputs end 2018-12-31; latest annual assets end 2025-12-31* | | | | | |
| Interest coverage | not computable | 2.26x | | | |
| *latest aligned inputs end 2018-12-31; latest annual assets end 2025-12-31* | | | | | |
| Current ratio | 1.08x | 1.38x | 67.1 | 296 | 2025-12-31 |
| **Growth and financing, sleeve percentile 50.5** | | | | | |
| Revenue growth, three-year compound | 3.2% | 1.5% | 39.6 | 269 | 2025-12-31 |
| Free cash flow growth, three-year compound | (28.0%) | 5.6% | 91.8 | 147 | 2025-12-31 |
| Reinvestment rate | not computable | 7.3% | | | |
| *latest aligned inputs end 2018-12-31; latest annual assets end 2025-12-31* | | | | | |
| Asset growth, three years | 8.0% | 3.1% | 26.9 | 272 | 2025-12-31 |
| Net share issuance, one year | (0.8%) | (0.6%) | 43.5 | 210 | 2026-02-17 |

## 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 |
|---|---|---|---|---|
| 153 | Autozone Inc. (AZO) | 59.1 | C/D | |
| 154 | Stitch Fix, Inc. (SFIX) | 59.5 | C/D | |
| 155 | Resideo Technologies, Inc. (REZI) | 59.9 | C/D | short runway |
| 156 | Albertsons Companies, Inc. (ACI) | 60.3 | C/D | |
| 157 | Wayfair Inc. (W) | 60.7 | C/D | |
| 158 | Genuine Parts Co. (GPC) | 61.1 | C/D | |
| 159 | Kohls Corp. (KSS) | 61.5 | C/D | |
| 160 | MGP Ingredients Inc. (MGPI) | 61.9 | C/D | |
| 161 | Marinemax Inc. (HZO) | 62.3 | C/D | |
| 162 | CarParts.com, Inc. (PRTS) | 62.6 | C/D | |
| 163 | Asbury Automotive Group Inc. (ABG) | 63.0 | D | |

## 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 | (0.1%) | 0.2% | 49 |
| Distance from 52-week high | (10.3%) | (20.6%) | 73 |
| EBIT to enterprise value | 6.4% | 5.4% | 64 |
| Free cash flow yield | 2.3% | 4.0% | 35 |
| Book value to price | 0.25 | 0.34 | 40 |

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| | | | |
|---|---|---|---|
| Sales to price | 1.32 | 1.68 | 42 |
| Composite equity issuance, five years | (20.3%) | (16.7%) | 38 |
| Relative strength against the sector, log excess return | 0.02 | 0.03 | 49 |

## Diagnostics

*shown on every report; none enters the grade*

| Measure | Value |
|---|---|
| **Piotroski F-score 6 of 9, period end 2025-12-31** | |
| Return on assets above zero | pass |
| Operating cash flow above zero | pass |
| Return on assets improved | fail |
| Operating cash flow exceeds net income | pass |
| Long-term leverage fell | pass |
| Current ratio improved | fail |
| No new shares issued | pass |
| Gross margin improved | pass |
| Asset turnover improved | fail |
| **Cash, filings, liquidity** | |
| Cash and equivalents | n/a |
| Operating cash flow, four quarters | n/a |
| Months of runway | not finite |
| Days since last periodic filing | 90 (10-Q received Jul 21, 2026) |
| Median daily dollar volume, 63 sessions | $125.8M |

## 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 | $8.9B | 2025-12-31 | 2026-02-20 | 10-K | 26-000003 |
| 2 | assets | us-gaap:Assets | $20.8B | 2025-12-31 | 2026-02-20 | 10-K | 26-000003 |
| 3 | operating income | us-gaap:OperatingIncomeLoss | $1.4B | 2018-12-31 | 2019-02-25 | 10-K | 19-000015 |
| 4 | pretax income | us-gaap:IncomeLossFromContinuingOperationsBeforeInc... | $994.6M | 2018-12-31 | 2021-02-19 | 10-K | 21-000009 |
| 5 | income tax | us-gaap:IncomeTaxExpenseBenefit | $245.1M | 2018-12-31 | 2021-02-19 | 10-K | 21-000009 |
| 6 | total debt | us-gaap:LongTermDebt | $3.1B | 2018-12-31 | 2020-02-21 | 10-K | 20-000010 |
| 7 | book equity | us-gaap:StockholdersEquity | $3.5B | 2018-12-31 | 2020-02-21 | 10-K | 20-000010 |
| 8 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $333.5M | 2018-12-31 | 2019-02-25 | 10-K | 19-000015 |
| 9 | total debt | us-gaap:LongTermDebt | $3.2B | 2017-12-31 | 2019-02-25 | 10-K | 19-000015 |
| 10 | book equity | us-gaap:StockholdersEquity | $3.4B | 2017-12-31 | 2019-02-25 | 10-K | 19-000015 |
| 11 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $314.9M | 2017-12-31 | 2019-02-25 | 10-K | 19-000015 |
| 12 | net income | us-gaap:NetIncomeLoss | $65.9M | 2025-12-31 | 2026-02-20 | 10-K | 26-000003 |
| 13 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $890.8M | 2025-12-31 | 2026-02-20 | 10-K | 26-000003 |
| 14 | assets | us-gaap:Assets | $19.3B | 2024-12-31 | 2026-02-20 | 10-K | 26-000003 |
| 15 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $24.3B | 2025-12-31 | 2026-02-20 | 10-K | 26-000003 |
| 16 | gross profit | us-gaap:GrossProfit | $8.5B | 2024-12-31 | 2026-02-20 | 10-K | 26-000003 |
| 17 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $23.5B | 2024-12-31 | 2026-02-20 | 10-K | 26-000003 |
| 18 | gross profit | us-gaap:GrossProfit | $8.3B | 2023-12-31 | 2026-02-20 | 10-K | 26-000003 |
| 19 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $23.1B | 2023-12-31 | 2026-02-20 | 10-K | 26-000003 |
| 20 | gross profit | us-gaap:GrossProfit | $7.7B | 2022-12-31 | 2025-02-21 | 10-K | 25-000026 |
| 21 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $22.1B | 2022-12-31 | 2025-02-21 | 10-K | 25-000026 |
| 22 | gross profit | us-gaap:GrossProfit | $6.6B | 2021-12-31 | 2024-02-22 | 10-K | 24-000024 |
| 23 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $18.9B | 2021-12-31 | 2024-02-22 | 10-K | 24-000024 |
| 24 | depreciation amortization | us-gaap:DepreciationDepletionAndAmortization | $227.6M | 2018-12-31 | 2021-02-19 | 10-K | 21-000009 |
| 25 | interest expense | us-gaap:InterestExpense | $101.8M | 2018-12-31 | 2021-02-19 | 10-K | 21-000009 |
| 26 | current assets | us-gaap:AssetsCurrent | $10.6B | 2025-12-31 | 2026-02-20 | 10-K | 26-000003 |
| 27 | current liabilities | us-gaap:LiabilitiesCurrent | $9.8B | 2025-12-31 | 2026-02-20 | 10-K | 26-000003 |

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| | | | | | | | |
|---|---|---|---|---|---|---|---|
| 28 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $469.8M | 2025-12-31 | 2026-02-20 | 10-K | 26-000003 |
| 29 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $1.3B | 2024-12-31 | 2026-02-20 | 10-K | 26-000003 |
| 30 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $567.3M | 2024-12-31 | 2026-02-20 | 10-K | 26-000003 |
| 31 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $1.4B | 2023-12-31 | 2026-02-20 | 10-K | 26-000003 |
| 32 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $512.7M | 2023-12-31 | 2026-02-20 | 10-K | 26-000003 |
| 33 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivitiesC... | $1.5B | 2022-12-31 | 2023-02-23 | 10-K | 23-000008 |
| 34 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $339.6M | 2022-12-31 | 2025-02-21 | 10-K | 25-000026 |
| 35 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $226.5M | 2018-12-31 | 2021-02-19 | 10-K | 21-000009 |
| 36 | current assets | us-gaap:AssetsCurrent | $7.6B | 2018-12-31 | 2020-02-21 | 10-K | 20-000010 |
| 37 | current liabilities | us-gaap:LiabilitiesCurrent | $5.9B | 2018-12-31 | 2020-02-21 | 10-K | 20-000010 |
| 38 | current assets | us-gaap:AssetsCurrent | $7.3B | 2017-12-31 | 2019-02-25 | 10-K | 19-000015 |
| 39 | current liabilities | us-gaap:LiabilitiesCurrent | $5.5B | 2017-12-31 | 2019-02-25 | 10-K | 19-000015 |
| 40 | assets | us-gaap:Assets | $18.0B | 2023-12-31 | 2025-02-21 | 10-K | 25-000026 |
| 41 | assets | us-gaap:Assets | $16.5B | 2022-12-31 | 2024-02-22 | 10-K | 24-000024 |
| 42 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 137,622,108 | 2026-02-17 | 2026-02-20 | 10-K | 26-000003 |
| 43 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 138,782,030 | 2025-02-18 | 2025-02-21 | 10-K | 25-000026 |

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