# Ingram Micro Holding Corp. INGM

NYSE; shops; SIC 5045, Wholesale-Computers & Peripheral Equipment & Software; CIK 0001897762

**D**

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

rank 185 of 258; percentile 71.6; sampling error 2.9 points; lower is stronger

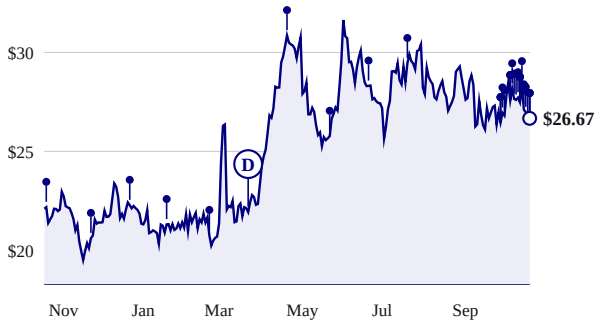
A B C D E

**D, the sloth**



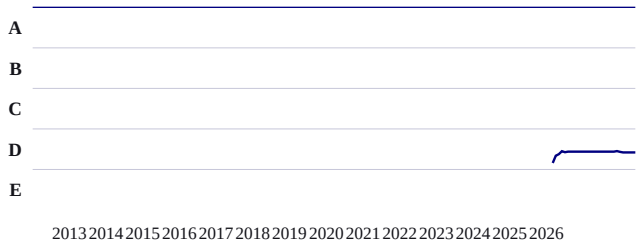
| Scoreboard | |
|---|---|
| **Profitability** | D<br>percentile 72.7 |
| **Solvency** | C<br>percentile 46.3 |
| **Growth and financing** | C/D<br>percentile 58.6 |
| **Reliability** | 0.94 AUC<br>filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025 |
| **Peer failure rate** | 0.52% a year<br>Item 1.03 bankruptcies, same asset band, 2012 to 2025 |
| **Size band** | over $2.67B assets<br>total assets $21.2B |
| **Standard universe** | inside<br>revenue above $1M and assets above $10M |
| **Warnings** | none triggered<br>not computable: distress |
| **Inputs computable** | 8 of 14 |
| **Graded from** | filings received through Mar 3, 2026<br>231 days before the rescan; latest periodic filing 10-Q received Jul 30, 2026 |
| **Last close** | $26.67<br>2026-10-19; market equity $6.2B; 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 Mar 3, 2026*

Ingram Micro is a leading solutions provider by revenue and/or by global footprint for the global information technology ("IT") ecosystem helping power the world's leading technology brands. With our vast infrastructure and focus on client and endpoint solutions, advanced solutions offerings, cloud-based and other solutions, we enable our business partners to scale and operate more efficiently in the markets they serve. We are at the center of the technology ecosystem and deliver customized solutions to our vendor and reseller partners, enabling them to provide excellent business outcomes to the end-user companies and consumers they serve.

## 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 72.7** | | | | | | |
| Gross profitability | 16.5% | 43.0% | | 84.6 | 242 | 2025-12-27 |
| Return on invested capital | 9.2% | 10.9% | | 60.2 | 84 | 2025-12-27 |
| Accruals ratio | (2.9%) | (4.9%) | | 73.2 | 288 | 2025-12-27 |

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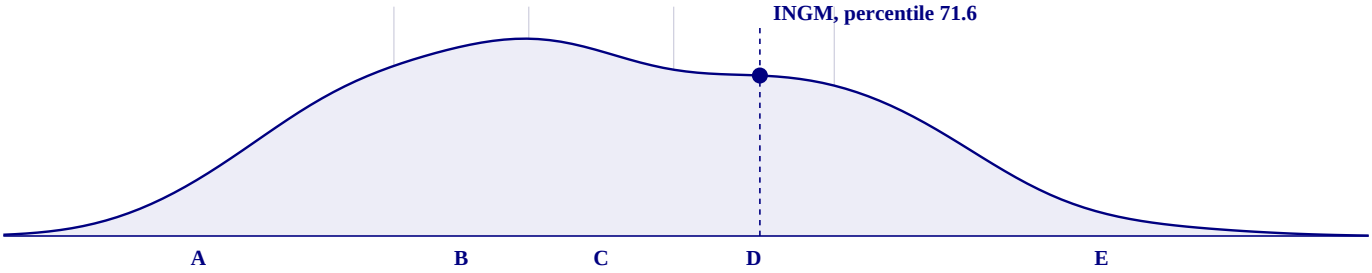
| | | | | | | |
|---|---|---|---|---|---|---|
| Gross margin stability, five years | not computable | 1.2 pts | | | | |
| *five annual gross margins are required; found 2* | | | | | | |
| **Solvency, sleeve percentile 46.3** | | | | | | |
| Twelve-month failure probability | not computable | 0.04% | | | | |
| *latest liabilities, cash plus short-term investments, book equity, and shares are required* | | | | | | |
| Altman Z double-prime | 2.19 | 1.92 | | 41.3 | 209 | 2025-12-27 |
| Net debt to EBITDA | 1.24x | 1.84x | | 44.4 | 100 | 2025-12-27 |
| Interest coverage | not computable | 2.26x | | | | |
| *one or more required annual facts are missing* | | | | | | |
| Current ratio | 1.33x | 1.38x | | 53.2 | 296 | 2025-12-27 |
| **Growth and financing, sleeve percentile 58.6** | | | | | | |
| Revenue growth, three-year compound | not computable | 1.5% | | | | |
| *four annual observations are required; found 2* | | | | | | |
| Free cash flow growth, three-year compound | not computable | 5.6% | | | | |
| *four consecutive annual FCF observations are required; found 2* | | | | | | |
| Reinvestment rate | (0.3%) | 7.3% | | 60.3 | 152 | 2025-12-27 |
| Asset growth, three years | not computable | 3.1% | | | | |
| *four annual observations are required; found 3* | | | | | | |
| Net share issuance, one year | 0.1% | (0.6%) | | 56.9 | 210 | 2026-02-23 |

## 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 |
|---|---|---|---|---|
| 180 | Lands' END, Inc. (LE) | 69.6 | D | short runway |
| 181 | Willis Lease Finance Corp. (WLFC) | 70.0 | D | |
| 182 | Builders FirstSource, Inc. (BLDR) | 70.4 | D | |
| 183 | Wendy's Co. (WEN) | 70.8 | D | |
| 184 | HF Foods Group Inc. (HFFG) | 71.2 | D | |
| 185 | Ingram Micro Holding Corp. (INGM) | 71.6 | D | |
| 186 | Team Inc. (TISI) | 72.0 | D | |
| 187 | Target Corp. (TGT) | 72.4 | D | |
| 188 | El Pollo Loco Holdings, Inc. (LOCO) | 72.8 | D | |
| 189 | Dave & Buster's Entertainment, Inc. (PLAY) | 73.2 | D | |
| 190 | Sherwin Williams Co. (SHW) | 73.5 | D | |

## What the price implies

*at the 2026-10-19 close; none of these enters the grade*

| Measure | Value | Peer median | Percentile |
|---|---|---|---|
| Twelve-month price change, skipping the latest month | 32.9% | 0.2% | 79 |
| Distance from 52-week high | (15.7%) | (20.8%) | 60 |
| EBIT to enterprise value | 9.6% | 5.3% | 86 |
| Free cash flow yield | 12.8% | 4.1% | 86 |

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| | | | |
|---|---|---|---|
| Book value to price | 0.70 | 0.34 | 72 |
| Sales to price | 8.54 | 1.69 | 92 |
| Composite equity issuance, five years | not computable | (16.7%) | |
| Relative strength against the sector, log excess return | 0.31 | 0.03 | 79 |

## Diagnostics

*shown on every report; none enters the grade*

| Measure | Value |
|---|---|
| **Piotroski F-score None of 9, period end 2025-12-27** | |
| 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 | fail |
| Current ratio improved | fail |
| No new shares issued | fail |
| Gross margin improved | fail |
| Asset turnover improved | fail |
| **Cash, filings, liquidity** | |
| Cash and equivalents | $809.0M |
| Operating cash flow, four quarters | -$96.6M |
| Months of runway | 100.5 |
| Days since last periodic filing | 82 (10-Q received Jul 30, 2026) |
| Median daily dollar volume, 63 sessions | $33.7M |

## 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 | $3.5B | 2025-12-27 | 2026-03-03 | 10-K | 26-013588 |
| 2 | assets | us-gaap:Assets | $21.2B | 2025-12-27 | 2026-03-03 | 10-K | 26-013588 |
| 3 | operating income | us-gaap:OperatingIncomeLoss | $876.9M | 2025-12-27 | 2026-03-03 | 10-K | 26-013588 |
| 4 | pretax income | us-gaap:IncomeLossFromContinuingOperationsBeforeInc... | $530.8M | 2025-12-27 | 2026-03-03 | 10-K | 26-013588 |
| 5 | income tax | us-gaap:IncomeTaxExpenseBenefit | $202.9M | 2025-12-27 | 2026-03-03 | 10-K | 26-013588 |
| 6 | total debt | us-gaap:LongTermDebt | $3.2B | 2025-12-27 | 2026-03-03 | 10-K | 26-013588 |
| 7 | book equity | us-gaap:StockholdersEquity | $4.2B | 2025-12-27 | 2026-03-03 | 10-K | 26-013588 |
| 8 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $1.9B | 2025-12-27 | 2026-03-03 | 10-K | 26-013588 |
| 9 | total debt | us-gaap:LongTermDebt | $3.4B | 2024-12-28 | 2026-03-03 | 10-K | 26-013588 |
| 10 | book equity | us-gaap:StockholdersEquity | $3.7B | 2024-12-28 | 2026-03-03 | 10-K | 26-013588 |
| 11 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $918.4M | 2024-12-28 | 2026-03-03 | 10-K | 26-013588 |
| 12 | net income | us-gaap:NetIncomeLoss | $327.9M | 2025-12-27 | 2026-03-03 | 10-K | 26-013588 |
| 13 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $916.1M | 2025-12-27 | 2026-03-03 | 10-K | 26-013588 |
| 14 | assets | us-gaap:Assets | $18.8B | 2024-12-28 | 2026-03-03 | 10-K | 26-013588 |
| 15 | current assets | us-gaap:AssetsCurrent | $18.2B | 2025-12-27 | 2026-03-03 | 10-K | 26-013588 |
| 16 | current liabilities | us-gaap:LiabilitiesCurrent | $13.7B | 2025-12-27 | 2026-03-03 | 10-K | 26-013588 |
| 17 | retained earnings | us-gaap:RetainedEarningsAccumulatedDeficit | $1.6B | 2025-12-27 | 2026-03-03 | 10-K | 26-013588 |
| 18 | liabilities | us-gaap:Liabilities | $17.0B | 2025-12-27 | 2026-03-03 | 10-K | 26-013588 |
| 19 | depreciation amortization | us-gaap:DepreciationDepletionAndAmortization | $197.2M | 2025-12-27 | 2026-03-03 | 10-K | 26-013588 |
| 20 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $52.6B | 2025-12-27 | 2026-03-03 | 10-K | 26-013588 |
| 21 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $48.0B | 2024-12-28 | 2026-03-03 | 10-K | 26-013588 |
| 22 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $130.8M | 2025-12-27 | 2026-03-03 | 10-K | 26-013588 |
| 23 | current assets | us-gaap:AssetsCurrent | $15.8B | 2024-12-28 | 2026-03-03 | 10-K | 26-013588 |
| 24 | current liabilities | us-gaap:LiabilitiesCurrent | $11.3B | 2024-12-28 | 2026-03-03 | 10-K | 26-013588 |
| 25 | assets | us-gaap:Assets | $17.6B | 2024-03-30 | 2025-03-05 | 10-K | 25-010298 |
| 26 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 235,074,694 | 2026-02-23 | 2026-03-03 | 10-K | 26-013588 |

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| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| 27 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 234,825,581 | 2025-02-25 | 2025-03-05 | 10-K | 25-010298 | |