MSC Industrial Direct Co. Inc.

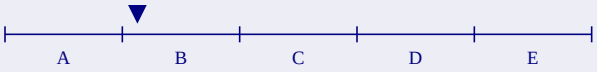
MSM

NYSE; shops; SIC 5084, Wholesale-Industrial Machinery & Equipment; CIK 0001003078

A/B

on the A/B boundary of 258 graded peers in shops

rank 59 of 258; percentile 22.6; sampling error 2.9 points; lower is stronger



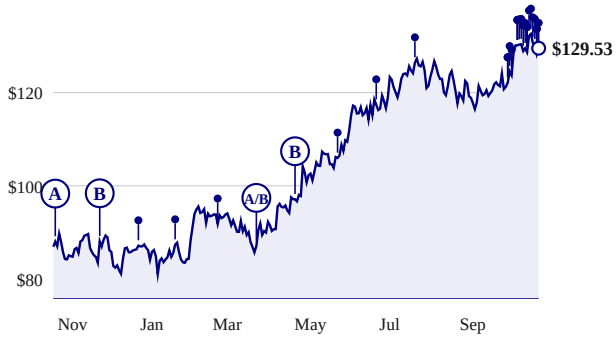
A/B, the bull



Scoreboard

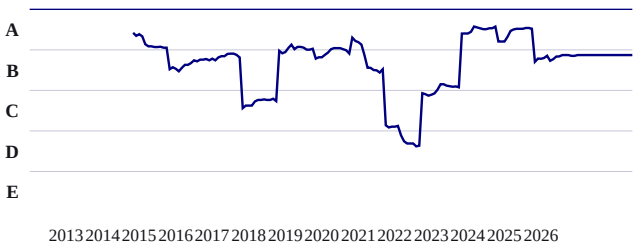
Profitability	B	percentile 30.3
Solvency	B	percentile 27.5
Growth and financing	C/D	percentile 60.2
Reliability	0.91 AUC	filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025
Peer failure rate	1.01% a year	Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$591M to $2.67B assets	total assets $2.5B
Standard universe	inside	revenue above $1M and assets above $10M
Warnings	none triggered	not computable: distress
Inputs computable	12 of 14	
Graded from	filings received through Oct 23, 2025	363 days before the rescan; latest periodic filing 10-Q received Jul 1, 2026
Last close	$129.70	2026-10-20; market equity $7.2B; 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 Oct 23, 2025

MSC is a leading North American distributor of a broad range of metalworking and maintenance, repair and operations ("MRO") products and services. With a history of driving innovation in industrial product distribution for more than 80 years, we help solve our manufacturing customers' metalworking and MRO challenges. Through our technical metalworking expertise and inventory management and other supply chain solutions, our team of more than 7,000 associates helps to keep our customers' manufacturing operations up and running and to improve their efficiency, productivity and profitability.

The fourteen inputs

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

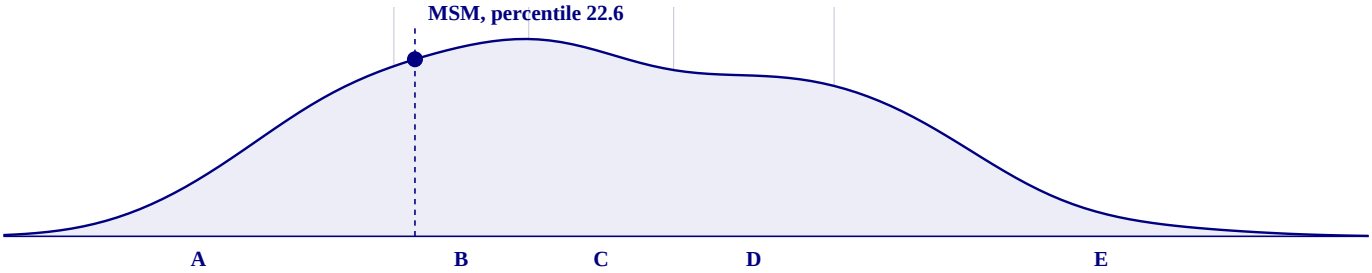
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 30.3						
Gross profitability	62.4%	43.0%		23.2	242	2025-08-30
Return on invested capital	14.4%	10.9%		36.1	84	2025-08-30
Accruals ratio	(5.5%)	(4.9%)		47.4	288	2025-08-30

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Gross margin stability, five years	0.5 pts	1.2 pts		14.6	220	2025-08-30
Solvency, sleeve percentile 27.5						
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	4.09	1.92		22.1	209	2025-08-30
Net debt to EBITDA	0.30x	1.84x		25.3	100	2025-08-30
Interest coverage	not computable	2.26x				
latest aligned inputs end 2023-09-02; latest annual assets end 2025-08-30						
Current ratio	1.68x	1.38x		35.3	296	2025-08-30
Growth and financing, sleeve percentile 60.2						
Revenue growth, three-year compound	0.7%	1.5%		54.1	269	2025-08-30
Free cash flow growth, three-year compound	9.2%	5.6%		42.5	147	2025-08-30
Reinvestment rate	(28.6%)	7.3%		78.8	152	2025-08-30
Asset growth, three years	(3.4%)	3.1%		73.8	272	2025-08-30
Net share issuance, one year	(0.2%)	(0.6%)		51.7	210	2025-10-02

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
54	Amazon COM Inc. (AMZN)	20.6	A/B	fortress balance sheet
55	Buckle Inc. (BKE)	21.0	A/B	
56	Hour Loop, Inc. (HOUR)	21.4	A/B	
57	Wesco International Inc. (WCC)	21.8	A/B	
58	Sprouts Farmers Market, Inc. (SFM)	22.2	A/B	fortress balance sheet
59	MSC Industrial Direct Co. Inc. (MSM)	22.6	A/B	
60	Arhaus, Inc. (ARHS)	23.0	B	
61	TE Connectivity plc (TEL)	23.3	B	
62	Carmax Inc. (KMX)	23.7	B	
63	Academy Sports & Outdoors, Inc. (ASO)	24.1	B	
64	Dillard'S, Inc. (DDS)	24.7	B	

What the price implies

at the 2026-10-20 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	33.9%	0.2%	80
Distance from 52-week high	(2.3%)	(20.6%)	94
EBIT to enterprise value	4.2%	5.3%	37
Free cash flow yield	3.3%	4.0%	42
Book value to price	0.20	0.34	34
Sales to price	0.52	1.66	16
Composite equity issuance, five years	not computable	(16.7%)	
Relative strength against the sector, log excess return	0.32	0.03	80

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Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 6 of 9, period end 2025-08-30	
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	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$74.1M
Operating cash flow, four quarters	$305.8M
Months of runway	not finite
Days since last periodic filing	112 (10-Q received Jul 1, 2026)
Median daily dollar volume, 63 sessions	$75.8M

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	$1.5B	2025-08-30	2025-10-23	10-K	25-000123
2	assets	us-gaap:Assets	$2.5B	2025-08-30	2025-10-23	10-K	25-000123
3	operating income	us-gaap:OperatingIncomeLoss	$301.6M	2025-08-30	2025-10-23	10-K	25-000123
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$263.6M	2025-08-30	2025-10-23	10-K	25-000123
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$65.7M	2025-08-30	2025-10-23	10-K	25-000123
6	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$168.8M	2025-08-30	2025-10-23	10-K	25-000123
7	book equity	us-gaap:StockholdersEquity	$1.4B	2025-08-30	2025-10-23	10-K	25-000123
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$56.2M	2025-08-30	2025-10-23	10-K	25-000123
9	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$278.9M	2024-08-31	2025-10-23	10-K	25-000123
10	book equity	us-gaap:StockholdersEquity	$1.4B	2024-08-31	2025-10-23	10-K	25-000123
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$29.6M	2024-08-31	2025-10-23	10-K	25-000123
12	net income	us-gaap:NetIncomeLoss	$199.3M	2025-08-30	2025-10-23	10-K	25-000123
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$333.7M	2025-08-30	2025-10-23	10-K	25-000123
14	assets	us-gaap:Assets	$2.5B	2024-08-31	2025-10-23	10-K	25-000123
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$3.8B	2025-08-30	2025-10-23	10-K	25-000123
16	gross profit	us-gaap:GrossProfit	$1.6B	2024-08-31	2025-10-23	10-K	25-000123
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$3.8B	2024-08-31	2025-10-23	10-K	25-000123
18	gross profit	us-gaap:GrossProfit	$1.6B	2023-09-02	2025-10-23	10-K	25-000123
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.0B	2023-09-02	2025-10-23	10-K	25-000123
20	gross profit	us-gaap:GrossProfit	$1.6B	2022-09-03	2024-10-24	10-K	24-000107
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$3.7B	2022-09-03	2024-10-24	10-K	24-000107
22	gross profit	us-gaap:GrossProfit	$1.3B	2021-08-28	2023-10-25	10-K	23-000102
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$3.2B	2021-08-28	2023-10-25	10-K	23-000102
24	current assets	us-gaap:AssetsCurrent	$1.2B	2025-08-30	2025-10-23	10-K	25-000123
25	current liabilities	us-gaap:LiabilitiesCurrent	$729.3M	2025-08-30	2025-10-23	10-K	25-000123
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$432.6M	2025-08-30	2025-10-23	10-K	25-000123
27	liabilities	us-gaap:Liabilities	$1.1B	2025-08-30	2025-10-23	10-K	25-000123
28	depreciation amortization	us-gaap:Depreciation	$72.1M	2025-08-30	2025-10-23	10-K	25-000123
29	operating income	us-gaap:OperatingIncomeLoss	$483.7M	2023-09-02	2025-10-23	10-K	25-000123
30	interest expense	us-gaap:InterestExpense	$22.5M	2023-09-02	2023-10-25	10-K	23-000102
31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$92.8M	2025-08-30	2025-10-23	10-K	25-000123

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32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$410.7M	2024-08-31	2025-10-23	10-K	25-000123
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$99.4M	2024-08-31	2025-10-23	10-K	25-000123
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$699.6M	2023-09-02	2025-10-23	10-K	25-000123
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$92.5M	2023-09-02	2025-10-23	10-K	25-000123
36	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$246.2M	2022-09-03	2024-10-24	10-K	24-000107
37	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$61.4M	2022-09-03	2024-10-24	10-K	24-000107
38	current assets	us-gaap:AssetsCurrent	$1.2B	2024-08-31	2025-10-23	10-K	25-000123
39	current liabilities	us-gaap:LiabilitiesCurrent	$605.4M	2024-08-31	2025-10-23	10-K	25-000123
40	assets	us-gaap:Assets	$2.5B	2023-09-02	2024-10-24	10-K	24-000107
41	assets	us-gaap:Assets	$2.7B	2022-09-03	2023-10-25	10-K	23-000102
42	shares outstanding	dei:EntityCommonStockSharesOutstanding	55,790,152	2025-10-02	2025-10-23	10-K	25-000123
43	shares outstanding	dei:EntityCommonStockSharesOutstanding	55,903,690	2024-10-04	2024-10-24	10-K	24-000107

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