Dollar General Corp.

DG

NYSE; shops; SIC 5331, Retail-Variety Stores; CIK 0000029534

B/C

on the B/C boundary of 256 graded peers in shops

rank 96 of 256; percentile 37.3; sampling error 2.9 points; lower is stronger

A B C D E

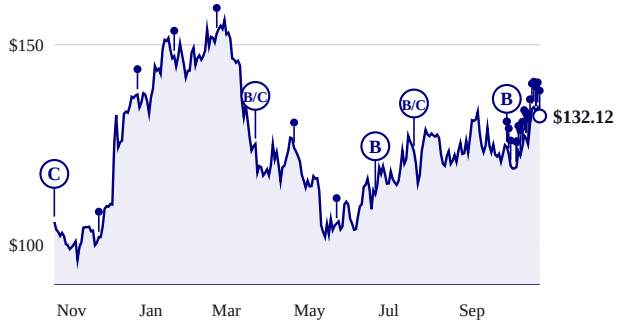
B/C, the elk



Scoreboard

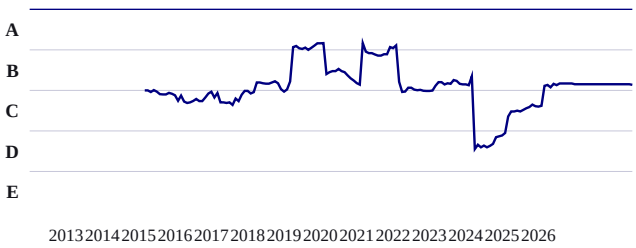
Profitability	B/C percentile 38.1
Solvency	C percentile 52.2
Growth and financing	C percentile 44.6
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $31.0B
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 Mar 20, 2026 216 days before the rescan; latest periodic filing 10-Q received Aug 27, 2026
Last close	$132.13 2026-10-21; market equity $29.2B; 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 20, 2026

We are the largest discount retailer in the United States by number of stores, with 20,959 stores located in 48 U.S. states and Mexico as of February 27, 2026, with the greatest concentration of stores in the southern, southwestern, midwestern and eastern United States. Our first stores in Mexico opened in 2023. We offer a broad selection of merchandise, including consumable items, seasonal items, home products and apparel. Our merchandise includes national brands from leading manufacturers, as well as our own private brand selections with prices at substantial discounts to national brands.

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 38.1						
Gross profitability	42.3%	42.6%		49.0	240	2026-01-30
Return on invested capital	14.1%	10.9%		38.6	84	2026-01-30
Accruals ratio	(6.8%)	(4.9%)		37.9	286	2026-01-30

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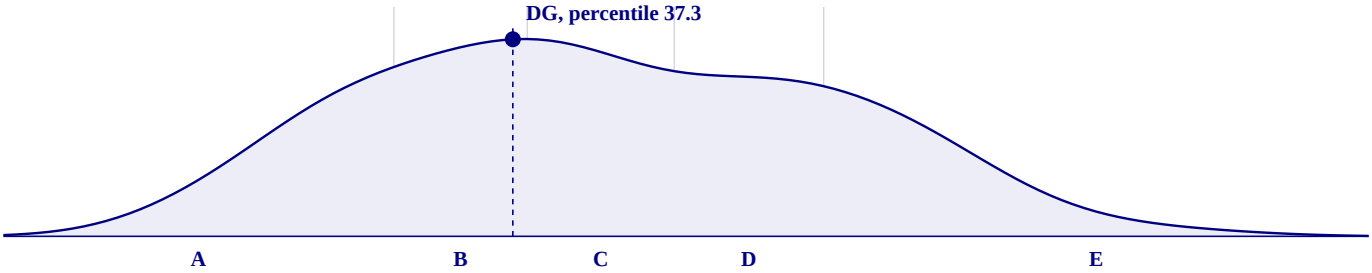
Gross margin stability, five years	0.7 pts	1.2 pts	27.2	218	2026-01-30
Solvency, sleeve percentile 52.2					
Twelve-month failure probability	not computable	0.04%			
latest liabilities, cash plus short-term investments, book equity, and shares are required					
Altman Z double-prime	1.54	1.93	51.9	207	2026-01-30
Net debt to EBITDA	1.05x	1.84x	40.4	100	2026-01-30
Interest coverage	not computable	2.28x			
latest aligned inputs end 2024-02-02; latest annual assets end 2026-01-30					
Current ratio	1.13x	1.38x	64.2	294	2026-01-30
Growth and financing, sleeve percentile 44.6					
Revenue growth, three-year compound	4.1%	1.6%	36.5	267	2026-01-30
Free cash flow growth, three-year compound	78.1%	5.6%	7.5	147	2026-01-30
Reinvestment rate	(9.7%)	7.3%	70.2	152	2026-01-30
Asset growth, three years	2.1%	3.4%	50.9	270	2026-01-30
Net share issuance, one year	0.1%	(0.6%)	57.7	209	2026-03-18

Among 256 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
91	Cencora, Inc. (COR)	35.3	B	
92	Reborn Coffee, Inc. (REBN)	35.7	B	dilution, late filer, fortress balance sheet
93	Alta Equipment Group Inc. (ALTG)	36.3	B	
94	Alta Equipment Group Inc. (ALTG-PA)	36.3	B	
95	Avnet Inc. (AVT)	36.9	B	
96	Dollar General Corp. (DG)	37.3	B/C	
97	Zumiez Inc. (ZUMZ)	37.6	B/C	fortress balance sheet
98	Haverty Furniture Companies Inc. (HVT)	38.2	B/C	fortress balance sheet
99	Haverty Furniture Companies Inc. (HVT-A)	38.2	B/C	fortress balance sheet
100	Openlane, Inc. (OPLN)	38.8	B/C	
101	Giftify, Inc. (GIFT)	39.2	B/C	

What the price implies

at the 2026-10-21 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	25.1%	0.6%	73
Distance from 52-week high	(15.4%)	(21.0%)	59
EBIT to enterprise value	6.9%	5.4%	68
Free cash flow yield	8.2%	4.1%	77
Book value to price	0.32	0.35	45
Sales to price	1.47	1.70	47
Composite equity issuance, five years	(16.9%)	(16.8%)	49

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Relative strength against the sector, log excess return	0.25	0.03	73

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 7 of 9, period end 2026-01-30	
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	pass
Current ratio improved	fail
No new shares issued	fail
Gross margin improved	pass
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$1.6B
Operating cash flow, four quarters	$3.3B
Months of runway	not finite
Days since last periodic filing	56 (10-Q received Aug 27, 2026)
Median daily dollar volume, 63 sessions	$268.2M

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	$13.1B	2026-01-30	2026-03-20	10-K	26-032325
2	assets	us-gaap:Assets	$31.0B	2026-01-30	2026-03-20	10-K	26-032325
3	operating income	us-gaap:OperatingIncomeLoss	$2.2B	2026-01-30	2026-03-20	10-K	26-032325
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$2.0B	2026-01-30	2026-03-20	10-K	26-032325
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$452.3M	2026-01-30	2026-03-20	10-K	26-032325
6	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$4.6B	2026-01-30	2026-03-20	10-K	26-032325
7	book equity	us-gaap:StockholdersEquity	$8.5B	2026-01-30	2026-03-20	10-K	26-032325
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$1.1B	2026-01-30	2026-03-20	10-K	26-032325
9	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$5.7B	2025-01-31	2026-03-20	10-K	26-032325
10	book equity	us-gaap:StockholdersEquity	$7.4B	2025-01-31	2026-03-20	10-K	26-032325
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$932.6M	2025-01-31	2026-03-20	10-K	26-032325
12	net income	us-gaap:NetIncomeLoss	$1.5B	2026-01-30	2026-03-20	10-K	26-032325
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$3.6B	2026-01-30	2026-03-20	10-K	26-032325
14	assets	us-gaap:Assets	$31.1B	2025-01-31	2026-03-20	10-K	26-032325
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$42.7B	2026-01-30	2026-03-20	10-K	26-032325
16	gross profit	us-gaap:GrossProfit	$12.0B	2025-01-31	2026-03-20	10-K	26-032325
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$40.6B	2025-01-31	2026-03-20	10-K	26-032325
18	gross profit	us-gaap:GrossProfit	$11.7B	2024-02-02	2026-03-20	10-K	26-032325
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$38.7B	2024-02-02	2026-03-20	10-K	26-032325
20	gross profit	us-gaap:GrossProfit	$11.8B	2023-02-03	2025-03-21	10-K	25-003413
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$37.8B	2023-02-03	2025-03-21	10-K	25-003413
22	gross profit	us-gaap:GrossProfit	$10.8B	2022-01-28	2024-03-25	10-K	24-003813
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$34.2B	2022-01-28	2024-03-25	10-K	24-003813
24	current assets	us-gaap:AssetsCurrent	$7.9B	2026-01-30	2026-03-20	10-K	26-032325
25	current liabilities	us-gaap:LiabilitiesCurrent	$7.0B	2026-01-30	2026-03-20	10-K	26-032325
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$4.4B	2026-01-30	2026-03-20	10-K	26-032325
27	liabilities	us-gaap:Liabilities	$22.5B	2026-01-30	2026-03-20	10-K	26-032325
28	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$1.0B	2026-01-30	2026-03-20	10-K	26-032325
29	operating income	us-gaap:OperatingIncomeLoss	$2.4B	2024-02-02	2026-03-20	10-K	26-032325
30	interest expense	us-gaap:InterestExpense	$326.8M	2024-02-02	2024-03-25	10-K	24-003813

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31	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$1.2B	2026-01-30	2026-03-20	10-K	26-032325
32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$3.0B	2025-01-31	2026-03-20	10-K	26-032325
33	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$1.3B	2025-01-31	2026-03-20	10-K	26-032325
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$2.4B	2024-02-02	2026-03-20	10-K	26-032325
35	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$1.7B	2024-02-02	2026-03-20	10-K	26-032325
36	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$2.0B	2023-02-03	2025-03-21	10-K	25-003413
37	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$1.6B	2023-02-03	2025-03-21	10-K	25-003413
38	current assets	us-gaap:AssetsCurrent	$8.2B	2025-01-31	2026-03-20	10-K	26-032325
39	current liabilities	us-gaap:LiabilitiesCurrent	$6.9B	2025-01-31	2026-03-20	10-K	26-032325
40	assets	us-gaap:Assets	$30.8B	2024-02-02	2025-03-21	10-K	25-003413
41	assets	us-gaap:Assets	$29.1B	2023-02-03	2024-03-25	10-K	24-003813
42	shares outstanding	dei:EntityCommonStockSharesOutstanding	220,226,320	2026-03-18	2026-03-20	10-K	26-032325
43	shares outstanding	dei:EntityCommonStockSharesOutstanding	219,947,078	2025-03-19	2025-03-21	10-K	25-003413

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