DXP Enterprises Inc.

DXPE

Nasdaq; shops; SIC 5084, Wholesale-Industrial Machinery & Equipment; CIK 0001020710

A

strongest fifth of 256 graded peers in shops

rank 9 of 256; percentile 3.1; sampling error 2.9 points; lower is stronger

A B C D E

A, the bull



Scoreboard

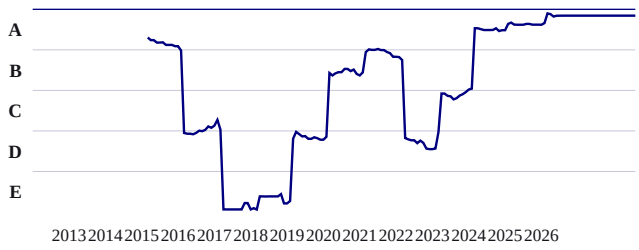
Profitability	C/D percentile 60.8
Solvency	A percentile 15.7
Growth and financing	A percentile 13.4
Reliability	0.91 AUC filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025
Peer failure rate	1.01% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$591M to $2.67B assets total assets $1.7B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress
Inputs computable	10 of 14
Graded from	filings received through Feb 26, 2026 238 days before the rescan; latest periodic filing 10-Q received Aug 6, 2026
Last close	$176.23 2026-10-21; market equity $2.7B; 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 26, 2026

Founded in 1908, DXP Enterprises, Inc. (together with our subsidiaries, hereinafter referred to as "DXP" or the "Company" or by the terms such as we, our, or us) was incorporated in Texas in 1996 to be the successor to SEPCO Industries, Inc. Since our predecessor company was founded, we have primarily been engaged in the business of distributing maintenance, repair and operating ("MRO") products, equipment and service to customers in a variety of end markets including the general industrial, energy, food & beverage, chemical, transportation, water and wastewater.

The fourteen inputs

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

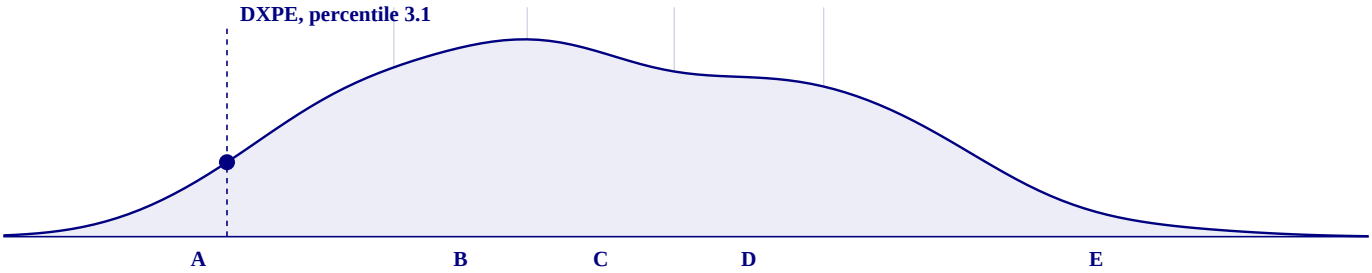
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 60.8						
Gross profitability	37.7%	42.6%		54.4	240	2025-12-31
Return on invested capital	not computable	10.9%				
prior invested-capital observation is 1096 days earlier						

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Accruals ratio	(0.4%)	(4.9%)	87.0	286	2025-12-31
Gross margin stability, five years	1.1 pts	1.2 pts	41.0	218	2025-12-31
Solvency, sleeve percentile 15.7					
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	4.55	1.93	18.4	207	2025-12-31
Net debt to EBITDA	not computable	1.84x			
EBITDA must exceed $100,000					
Interest coverage	not computable	2.28x			
latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31					
Current ratio	3.34x	1.38x	13.0	294	2025-12-31
Growth and financing, sleeve percentile 13.4					
Revenue growth, three-year compound	10.8%	1.6%	14.7	267	2025-12-31
Free cash flow growth, three-year compound	280.7%	5.6%	2.1	147	2025-12-31
Reinvestment rate	189.9%	7.3%	3.3	152	2025-12-31
Asset growth, three years	17.6%	3.4%	7.1	270	2025-12-31
Net share issuance, one year	(1.1%)	(0.6%)	39.9	209	2026-02-20

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
4	Ezcorp Inc. (EZPW)	1.2	A	
5	Five Below, Inc. (FIVE)	1.6	A	
6	Boot Barn Holdings, Inc. (BOOT)	2.0	A	
7	Brinker International, Inc. (EAT)	2.4	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

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	57.7%	0.6%	90
Distance from 52-week high	(11.6%)	(21.0%)	68
EBIT to enterprise value	6.2%	5.4%	61
Free cash flow yield	2.0%	4.1%	32
Book value to price	0.20	0.35	35
Sales to price	0.73	1.70	25

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Composite equity issuance, five years	(21.8%)	(16.8%)	35
Relative strength against the sector, log excess return	0.48	0.03	90

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 7 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	fail
Cash, filings, liquidity	
Cash and equivalents	$226.6M
Operating cash flow, four quarters	$134.6M
Months of runway	not finite
Days since last periodic filing	77 (10-Q received Aug 6, 2026)
Median daily dollar volume, 63 sessions	$24.2M

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	$635.9M	2025-12-31	2026-02-26	10-K	26-012382
2	assets	us-gaap:Assets	$1.7B	2025-12-31	2026-02-26	10-K	26-012382
3	operating income	us-gaap:OperatingIncomeLoss	-$27.7M	2020-12-31	2023-04-17	10-K	23-000044
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$48.3M	2020-12-31	2023-04-17	10-K	23-000044
5	income tax	us-gaap:IncomeTaxExpenseBenefit	-$18.7M	2020-12-31	2023-04-17	10-K	23-000044
6	total debt	us-gaap:LongTermDebt	$330.0M	2020-12-31	2021-10-22	10-K/A	21-000086
7	book equity	us-gaap:StockholdersEquity	$360.3M	2020-12-31	2022-04-05	10-K	22-000033
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$119.3M	2020-12-31	2022-04-05	10-K	22-000033
9	total debt	us-gaap:LongTermDebt	$242.0M	2017-12-31	2018-05-23	10-K	18-000005
10	book equity	us-gaap:StockholdersEquity	$268.0M	2017-12-31	2019-03-08	10-K	19-000023
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$22.0M	2017-12-31	2019-03-08	10-K	19-000023
12	net income	us-gaap:NetIncomeLoss	$88.7M	2025-12-31	2026-02-26	10-K	26-012382
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$94.3M	2025-12-31	2026-02-26	10-K	26-012382
14	assets	us-gaap:Assets	$1.3B	2024-12-31	2026-02-26	10-K	26-012382
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$2.0B	2025-12-31	2026-02-26	10-K	26-012382
16	gross profit	us-gaap:GrossProfit	$556.3M	2024-12-31	2026-02-26	10-K	26-012382
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.8B	2024-12-31	2026-02-26	10-K	26-012382
18	gross profit	us-gaap:GrossProfit	$505.3M	2023-12-31	2026-02-26	10-K	26-012382
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.7B	2023-12-31	2026-02-26	10-K	26-012382
20	gross profit	us-gaap:GrossProfit	$422.0M	2022-12-31	2025-03-10	10-K	25-000036
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.5B	2022-12-31	2025-03-10	10-K	25-000036
22	gross profit	us-gaap:GrossProfit	$328.5M	2021-12-31	2024-03-11	10-K	24-000026
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.1B	2021-12-31	2024-03-11	10-K	24-000026
24	current assets	us-gaap:AssetsCurrent	$910.3M	2025-12-31	2026-02-26	10-K	26-012382
25	current liabilities	us-gaap:LiabilitiesCurrent	$272.5M	2025-12-31	2026-02-26	10-K	26-012382
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$478.3M	2025-12-31	2026-02-26	10-K	26-012382
27	operating income	us-gaap:OperatingIncomeLoss	$176.9M	2025-12-31	2026-02-26	10-K	26-012382
28	book equity	us-gaap:StockholdersEquity	$498.4M	2025-12-31	2026-02-26	10-K	26-012382
29	liabilities	us-gaap:Liabilities	$1.2B	2025-12-31	2026-02-26	10-K	26-012382

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30	depreciation amortization	us-gaap:Depreciation	$10.4M	2020-12-31	2023-04-17	10-K	23-000044
31	operating income	us-gaap:OperatingIncomeLoss	$138.7M	2023-12-31	2026-02-26	10-K	26-012382
32	interest expense	us-gaap:InterestExpense	$53.1M	2023-12-31	2024-03-11	10-K	24-000026
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$40.3M	2025-12-31	2026-02-26	10-K	26-012382
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$102.2M	2024-12-31	2026-02-26	10-K	26-012382
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$25.1M	2024-12-31	2026-02-26	10-K	26-012382
36	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$106.2M	2023-12-31	2026-02-26	10-K	26-012382
37	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$12.3M	2023-12-31	2026-02-26	10-K	26-012382
38	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$5.9M	2022-12-31	2025-03-10	10-K	25-000036
39	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$4.9M	2022-12-31	2025-03-10	10-K	25-000036
40	depreciation amortization	us-gaap:Depreciation	$10.4M	2025-12-31	2026-02-26	10-K	26-012382
41	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$119.2M	2025-12-31	2026-02-26	10-K	26-012382
42	income tax	us-gaap:IncomeTaxExpenseBenefit	$30.5M	2025-12-31	2026-02-26	10-K	26-012382
43	current assets	us-gaap:AssetsCurrent	$661.9M	2024-12-31	2026-02-26	10-K	26-012382
44	current liabilities	us-gaap:LiabilitiesCurrent	$244.0M	2024-12-31	2026-02-26	10-K	26-012382
45	assets	us-gaap:Assets	$1.2B	2023-12-31	2025-03-10	10-K	25-000036
46	assets	us-gaap:Assets	$1.0B	2022-12-31	2024-03-11	10-K	24-000026
47	shares outstanding	dei:EntityCommonStockSharesOutstanding	15,522,213	2026-02-20	2026-02-26	10-K	26-012382
48	shares outstanding	dei:EntityCommonStockSharesOutstanding	15,695,088	2025-03-03	2025-03-10	10-K	25-000036

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