# Genuine Parts Co.

**GPC**

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

# C/D

**on the C/D boundary of 256 graded peers in shops**

rank 154 of 256; percentile 60.0; sampling error 2.9 points; lower is stronger

A B C D E

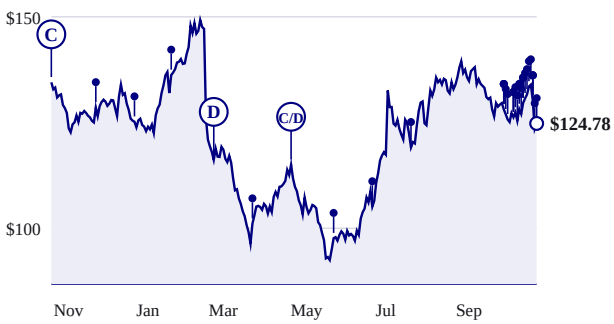
**C/D, the tortoise**



## Scoreboard

| | |
|---|---|
| **Profitability** | C<br>percentile 44.5 |
| **Solvency** | D<br>percentile 66.9 |
| **Growth and financing** | C<br>percentile 50.6 |
| **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 $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>244 days before the rescan; latest periodic filing 10-Q received Oct 20, 2026 |
| **Last close** | $124.77<br>2026-10-21; market equity $17.2B; 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 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 44.5** | | | | | | |
| Gross profitability | 43.0% | 42.6% | | 48.1 | 240 | 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%) | | 61.4 | 286 | 2025-12-31 |

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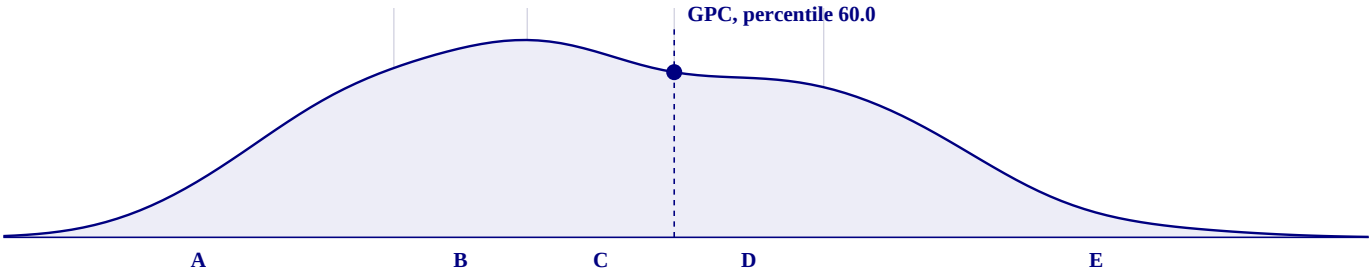
| | | | | | |
|---|---|---|---|---|---|
| Gross margin stability, five years | 0.7 pts | 1.2 pts | 24.0 | 218 | 2025-12-31 |
| **Solvency, sleeve percentile 66.9** | | | | | |
| Twelve-month failure probability | not computable | 0.04% | | | |
| *liabilities and a nearby cover-page share count are required at 2026-09-30* | | | | | |
| Altman Z double-prime | not computable | 1.93 | | | |
| *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 | 2.28x | | | |
| *latest aligned inputs end 2018-12-31; latest annual assets end 2025-12-31* | | | | | |
| Current ratio | 1.08x | 1.38x | 66.9 | 294 | 2025-12-31 |
| **Growth and financing, sleeve percentile 50.6** | | | | | |
| Revenue growth, three-year compound | 3.2% | 1.6% | 39.8 | 267 | 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% | 3.4% | 27.1 | 270 | 2025-12-31 |
| Net share issuance, one year | (0.8%) | (0.6%) | 43.8 | 209 | 2026-02-17 |

## 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 |
|---|---|---|---|---|
| 149 | Kroger Co. (KR) | 58.0 | C/D | |
| 150 | United Natural Foods Inc. (UNFI) | 58.4 | C/D | |
| 151 | Autonation, Inc. (AN) | 58.8 | C/D | |
| 152 | Autozone Inc. (AZO) | 59.2 | C/D | |
| 153 | Papa Johns International Inc. (PZZA) | 59.6 | C/D | |
| 154 | Genuine Parts Co. (GPC) | 60.0 | C/D | |
| 155 | Stitch Fix, Inc. (SFIX) | 60.4 | C/D | |
| 156 | Albertsons Companies, Inc. (ACI) | 60.8 | C/D | |
| 157 | Resideo Technologies, Inc. (REZI) | 61.2 | C/D | short runway |
| 158 | Wayfair Inc. (W) | 61.6 | C/D | |
| 159 | Kohls Corp. (KSS) | 62.0 | C/D | |

## 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 | (0.1%) | 0.6% | 49 |
| Distance from 52-week high | (16.4%) | (21.0%) | 56 |
| EBIT to enterprise value | 6.8% | 5.4% | 67 |
| Free cash flow yield | 2.4% | 4.1% | 35 |
| Book value to price | 0.27 | 0.35 | 43 |

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| | | | |
|---|---|---|---|
| Sales to price | 1.41 | 1.70 | 45 |
| Composite equity issuance, five years | (20.3%) | (16.8%) | 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 | 2 (10-Q received Oct 20, 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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