Genuine Parts Co.

GPC

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

C/D

on the C/D boundary of 255 graded peers in shops

rank 154 of 255; percentile 60.2; sampling error 3.0 points; lower is stronger

A B C D E

C/D, the tortoise



Scoreboard

Profitability	C percentile 44.4
Solvency	D percentile 66.6
Growth and financing	C percentile 50.6
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 $20.8B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: short runway, distress
Inputs computable	8 of 14
Graded from	filings received through Feb 20, 2026 246 days before the rescan; latest periodic filing 10-Q received Oct 20, 2026
Last close	$122.98 2026-10-23; market equity $17.0B; 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

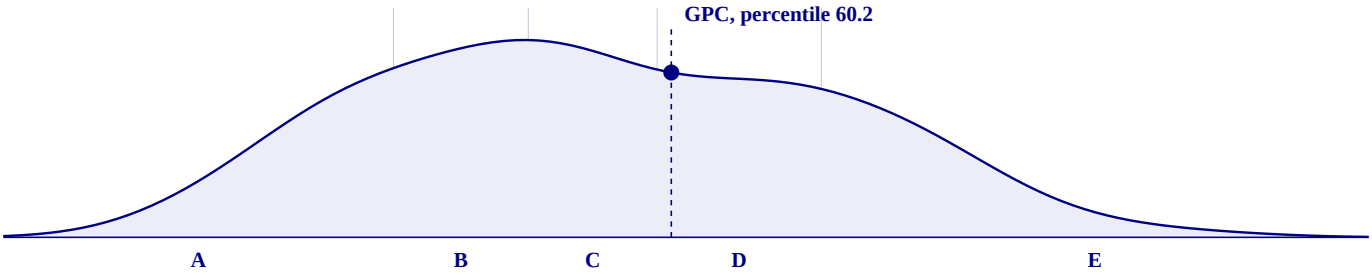
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 44.4						
Gross profitability	43.0%	42.3%		48.1	240	2025-12-31
Return on invested capital	not computable	10.9%				
latest aligned inputs end 2018-12-31; latest annual assets end 2025-12-31						
Accruals ratio	(4.1%)	(4.9%)		60.9	285	2025-12-31

Not investment advice. Informational and educational only. Data from SEC EDGAR, may contain errors, is not warranted. The grade ranks reported financial condition and is not a return forecast.

Gross margin stability, five years	0.7 pts	1.2 pts	24.1	217	2025-12-31
Solvency, sleeve percentile 66.6					
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	2.49x			
latest aligned inputs end 2018-12-31; latest annual assets end 2025-12-31					
Current ratio	1.08x	1.38x	66.6	294	2025-12-31
Growth and financing, sleeve percentile 50.6					
Revenue growth, three-year compound	3.2%	1.6%	40.0	266	2025-12-31
Free cash flow growth, three-year compound	(28.0%)	5.5%	91.1	147	2025-12-31
Reinvestment rate	not computable	8.4%			
latest aligned inputs end 2018-12-31; latest annual assets end 2025-12-31					
Asset growth, three years	8.0%	3.4%	27.2	269	2025-12-31
Net share issuance, one year	(0.8%)	(0.6%)	44.0	208	2026-02-17

Among 255 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)	58.3	C/D	
150	Autonation, Inc. (AN)	58.7	C/D	
151	United Natural Foods Inc. (UNFI)	59.1	C/D	
152	Autozone Inc. (AZO)	59.4	C/D	
153	Papa Johns International Inc. (PZZA)	59.8	C/D	
154	Genuine Parts Co. (GPC)	60.2	C/D	
155	Albertsons Companies, Inc. (ACI)	60.6	C/D	
156	Stitch Fix, Inc. (SFIX)	61.0	C/D	
157	Resideo Technologies, Inc. (REZI)	61.4	C/D	short runway
158	Wayfair Inc. (W)	61.8	C/D	
159	Kohls Corp. (KSS)	62.2	C/D	

What the price implies

at the 2026-10-23 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	(17.6%)	(22.7%)	57
EBIT to enterprise value	6.9%	5.3%	69
Free cash flow yield	2.5%	4.1%	36
Book value to price	0.27	0.35	42

Not investment advice. Informational and educational only. Data from SEC EDGAR, may contain errors, is not warranted. The grade ranks reported financial condition and is not a return forecast.

Sales to price	1.43	1.68	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	4 (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

Not investment advice. Informational and educational only. Data from SEC EDGAR, may contain errors, is not warranted. The grade ranks reported financial condition and is not a return forecast.

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

Not investment advice. Informational and educational only. Data from SEC EDGAR, may contain errors, is not warranted. The grade ranks reported financial condition and is not a return forecast.