Global Industrial Co.

GIC

NYSE; shops; SIC 5084, Wholesale-Industrial Machinery & Equipment; CIK 0000945114

A

strongest fifth of 255 graded peers in shops

rank 11 of 255; percentile 3.9; sampling error 3.0 points; lower is stronger

A B C D E

A, the bull



Scoreboard

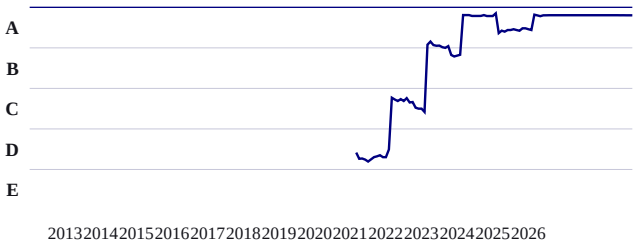
Profitability	B/C percentile 42.3
Solvency	A/B percentile 18.7
Growth and financing	B percentile 32.7
Reliability	0.87 AUC filers with $120M to $591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025
Peer failure rate	1.03% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$120M to $591M assets total assets $580.8M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress, fortress balance sheet
Inputs computable	10 of 14
Graded from	filings received through Feb 27, 2026 241 days before the rescan; latest periodic filing 10-Q received Aug 4, 2026
Last close	$44.48 2026-10-23; market equity $1.7B; 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 27, 2026

Global Industrial Company, through its operating subsidiaries, is a value-added distributor of industrial equipment and source for industrial equipment and supplies in North America going to market through a system of branded e-commerce websites and relationship marketers. The Company was incorporated in Delaware in 1995. Certain predecessor businesses which now constitute the Company's operations have been in business since 1949. Our headquarters office is located at 11 Harbor Park Drive, Port Washington, New York.

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 42.3						
Gross profitability	84.4%	42.3%		12.1	240	2025-12-31
Return on invested capital	not computable	10.9%				

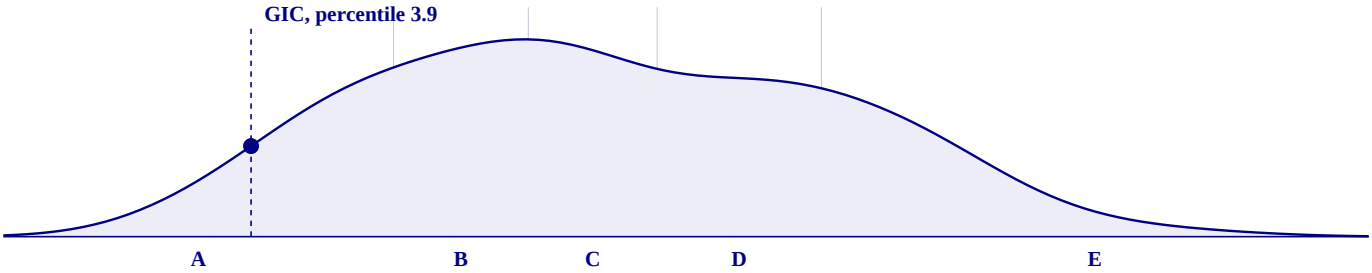
required facts have no common fiscal period end

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Accruals ratio	(1.0%)	(4.9%)	84.2	285	2025-12-31
Gross margin stability, five years	0.7 pts	1.2 pts	30.6	217	2025-12-31
Solvency, sleeve percentile 18.7					
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	5.50	1.93	13.6	207	2025-12-31
Net debt to EBITDA	not computable	1.84x			
required facts have no common fiscal period end					
Interest coverage	not computable	2.49x			
latest aligned inputs end 2014-12-31; latest annual assets end 2025-12-31					
Current ratio	2.22x	1.38x	23.9	294	2025-12-31
Growth and financing, sleeve percentile 32.7					
Revenue growth, three-year compound	5.8%	1.6%	27.9	266	2025-12-31
Free cash flow growth, three-year compound	20.4%	5.5%	26.7	147	2025-12-31
Reinvestment rate	40.6%	8.4%	33.1	152	2025-12-31
Asset growth, three years	8.5%	3.4%	24.6	269	2025-12-31
Net share issuance, one year	(0.3%)	(0.6%)	51.2	208	2026-02-20

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
6	Boot Barn Holdings, Inc. (BOOT)	2.0	A	
7	Brinker International, Inc. (EAT)	2.4	A	
8	Fastenal Co. (FAST)	2.8	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
15	Chipotle Mexican Grill Inc. (CMG)	5.5	A	fortress balance sheet
16	W.W. Grainger, Inc. (GWW)	5.9	A	

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	10.5%	0.6%	61
Distance from 52-week high	(1.0%)	(22.7%)	97
EBIT to enterprise value	6.1%	5.3%	57
Free cash flow yield	4.4%	4.1%	55
Book value to price	0.20	0.35	35
Sales to price	0.81	1.68	29

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Composite equity issuance, five years	(17.5%)	(16.8%)	47
Relative strength against the sector, log excess return	0.12	0.03	61

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score None 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	pass
Cash, filings, liquidity	
Cash and equivalents	$86.7M
Operating cash flow, four quarters	$90.5M
Months of runway	not finite
Days since last periodic filing	83 (10-Q received Aug 4, 2026)
Median daily dollar volume, 63 sessions	$5.3M

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	$490.2M	2025-12-31	2026-02-27	10-K	26-012945
2	assets	us-gaap:Assets	$580.8M	2025-12-31	2026-02-27	10-K	26-012945
3	net income	us-gaap:NetIncomeLoss	$72.1M	2025-12-31	2026-02-27	10-K	26-012945
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$77.8M	2025-12-31	2026-02-27	10-K	26-012945
5	assets	us-gaap:Assets	$520.7M	2024-12-31	2026-02-27	10-K	26-012945
6	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.4B	2025-12-31	2026-02-27	10-K	26-012945
7	gross profit	us-gaap:GrossProfit	$452.0M	2024-12-31	2026-02-27	10-K	26-012945
8	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.3B	2024-12-31	2026-02-27	10-K	26-012945
9	gross profit	us-gaap:GrossProfit	$435.8M	2023-12-31	2026-02-27	10-K	26-012945
10	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.3B	2023-12-31	2026-02-27	10-K	26-012945
11	gross profit	us-gaap:GrossProfit	$421.2M	2022-12-31	2025-02-26	10-K	25-000012
12	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.2B	2022-12-31	2025-02-26	10-K	25-000012
13	gross profit	us-gaap:GrossProfit	$374.3M	2021-12-31	2024-03-12	10-K	24-000016
14	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.1B	2021-12-31	2024-03-12	10-K	24-000016
15	current assets	us-gaap:AssetsCurrent	$396.5M	2025-12-31	2026-02-27	10-K	26-012945
16	current liabilities	us-gaap:LiabilitiesCurrent	$178.5M	2025-12-31	2026-02-27	10-K	26-012945
17	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$120.3M	2025-12-31	2026-02-27	10-K	26-012945
18	operating income	us-gaap:OperatingIncomeLoss	$97.6M	2025-12-31	2026-02-27	10-K	26-012945
19	book equity	us-gaap:StockholdersEquity	$313.2M	2025-12-31	2026-02-27	10-K	26-012945
20	liabilities	us-gaap:Liabilities	$267.6M	2025-12-31	2026-02-27	10-K	26-012945
21	operating income	us-gaap:OperatingIncomeLoss	-$13.7M	2014-12-31	2017-03-16	10-K	17-012370
22	interest expense	us-gaap:InterestExpense	$1.3M	2014-12-31	2015-03-13	10-K	15-011556
23	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$3.1M	2025-12-31	2026-02-27	10-K	26-012945
24	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$50.7M	2024-12-31	2026-02-27	10-K	26-012945
25	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$3.8M	2024-12-31	2026-02-27	10-K	26-012945
26	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$112.0M	2023-12-31	2026-02-27	10-K	26-012945
27	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$3.9M	2023-12-31	2026-02-27	10-K	26-012945
28	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$50.2M	2022-12-31	2025-02-26	10-K	25-000012
29	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$7.4M	2022-12-31	2025-02-26	10-K	25-000012

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30	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$7.7M	2025-12-31	2026-02-27	10-K	26-012945
31	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$97.6M	2025-12-31	2026-02-27	10-K	26-012945
32	income tax	us-gaap:IncomeTaxExpenseBenefit	$25.6M	2025-12-31	2026-02-27	10-K	26-012945
33	current assets	us-gaap:AssetsCurrent	$352.6M	2024-12-31	2026-02-27	10-K	26-012945
34	current liabilities	us-gaap:LiabilitiesCurrent	$168.4M	2024-12-31	2026-02-27	10-K	26-012945
35	assets	us-gaap:Assets	$513.4M	2023-12-31	2025-02-26	10-K	25-000012
36	assets	us-gaap:Assets	$455.2M	2022-12-31	2024-03-12	10-K	24-000016
37	shares outstanding	dei:EntityCommonStockSharesOutstanding	38,196,742	2026-02-20	2026-02-27	10-K	26-012945
38	shares outstanding	dei:EntityCommonStockSharesOutstanding	38,311,253	2025-02-20	2025-02-26	10-K	25-000012

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