# Pool Corp.

**POOL**

Nasdaq; shops; SIC 5090, Wholesale-Misc Durable Goods; CIK 0000945841

**B**

**second fifth of 256 graded peers in shops**

rank 87 of 256; percentile 33.7; sampling error 2.9 points; lower is stronger

A B C D E

**B, the elk**



| Scoreboard | |
|---|---|
| **Profitability** | C<br>percentile 53.5 |
| **Solvency** | B<br>percentile 23.6 |
| **Growth and financing** | C<br>percentile 54.5 |
| **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 $3.6B |
| **Standard universe** | inside<br>revenue above $1M and assets above $10M |
| **Warnings** | none triggered<br>not computable: short runway, distress |
| **Inputs computable** | 10 of 14 |
| **Graded from** | filings received through Feb 26, 2026<br>243 days before the rescan; latest periodic filing 10-Q received Jul 29, 2026 |
| **Last close** | $195.15<br>2026-10-26; market equity $7.1B; 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*

Pool Corporation (the Company, which may also be referred to as we, us or our), a member of the S&P 500 Index, is the world's largest wholesale distributor of swimming pool supplies, equipment and related leisure products and is one of the leading distributors of irrigation and landscape maintenance products in the United States. As of December 31, 2025, we operated 456 sales centers strategically located in North America, Europe and Australia, from which we sell swimming pool supplies, equipment and related leisure products, irrigation and landscape maintenance products and hardscapes, tile and stone products.

## 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 53.5** | | | | | | |
| Gross profitability | 43.4% | 42.0% | | 47.3 | 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*

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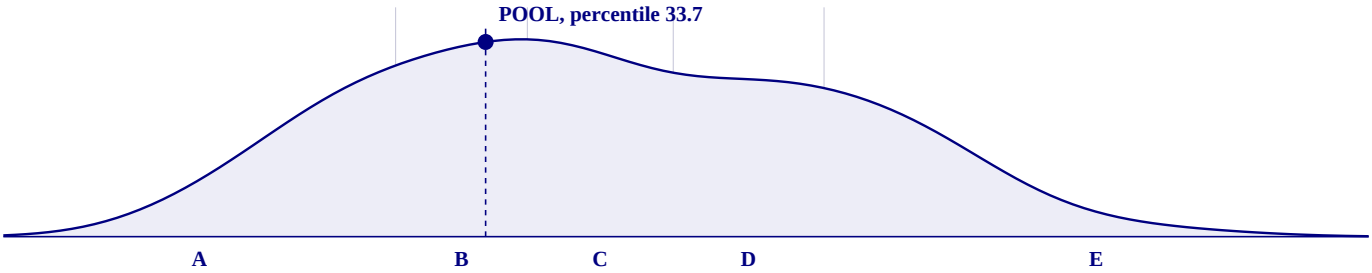
| | | | | | |
|---|---|---|---|---|---|
| Accruals ratio | 1.2% | (4.9%) | 91.5 | 285 | 2025-12-31 |
| Gross margin stability, five years | 0.6 pts | 1.2 pts | 21.7 | 218 | 2025-12-31 |
| **Solvency, sleeve percentile 23.6** | | | | | |
| Twelve-month failure probability | not computable | 0.04% | | | |
| *latest liabilities, cash plus short-term investments, book equity, and shares are required* | | | | | |
| Altman Z double-prime | 4.02 | 1.93 | 23.5 | 205 | 2025-12-31 |
| 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 2011-12-31; latest annual assets end 2025-12-31* | | | | | |
| Current ratio | 2.24x | 1.38x | 23.6 | 293 | 2025-12-31 |
| **Growth and financing, sleeve percentile 54.5** | | | | | |
| Revenue growth, three-year compound | (5.1%) | 1.6% | 76.3 | 267 | 2025-12-31 |
| Free cash flow growth, three-year compound | (11.1%) | 4.8% | 79.5 | 147 | 2025-12-31 |
| Reinvestment rate | 49.4% | 8.4% | 27.2 | 152 | 2025-12-31 |
| Asset growth, three years | 0.6% | 3.4% | 58.7 | 270 | 2025-12-31 |
| Net share issuance, one year | (2.2%) | (0.6%) | 30.9 | 208 | 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 |
|---|---|---|---|---|
| 82 | Coupang, Inc. (CPNG) | 31.8 | B | fortress balance sheet |
| 83 | Home Depot, Inc. (HD) | 32.2 | B | |
| 84 | Biglari Holdings Inc. (BH) | 32.7 | B | |
| 85 | Biglari Holdings Inc. (BH-A) | 32.7 | B | |
| 86 | Burlington Stores, Inc. (BURL) | 33.3 | B | |
| 87 | Pool Corp. (POOL) | 33.7 | B | |
| 88 | Weyco Group Inc. (WEYS) | 34.1 | B | |
| 89 | Flanigans Enterprises Inc. (BDL) | 34.5 | B | late filer, fortress balance sheet |
| 90 | Live Ventures Inc. (LIVE) | 34.9 | B | |
| 91 | Cencora, Inc. (COR) | 35.3 | B | |
| 92 | Reborn Coffee, Inc. (REBN) | 35.7 | B | dilution, late filer, fortress balance sheet |

## What the price implies

*at the 2026-10-26 close; none of these enters the grade*

| Measure | Value | Peer median | Percentile |
|---|---|---|---|
| Twelve-month price change, skipping the latest month | (38.3%) | 0.7% | 11 |
| Distance from 52-week high | (33.5%) | (22.3%) | 36 |
| EBIT to enterprise value | 7.0% | 5.3% | 70 |
| Free cash flow yield | 4.4% | 4.0% | 53 |
| Book value to price | 0.16 | 0.34 | 32 |

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| | | | |
|---|---|---|---|
| Sales to price | 0.74 | 1.67 | 26 |
| Composite equity issuance, five years | (17.7%) | (16.8%) | 47 |
| Relative strength against the sector, log excess return | (0.46) | 0.03 | 11 |

## 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 | fail |
| 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 | n/a |
| Operating cash flow, four quarters | n/a |
| Months of runway | not finite |
| Days since last periodic filing | 90 (10-Q received Jul 29, 2026) |
| Median daily dollar volume, 63 sessions | $119.6M |

## 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 | $1.6B | 2025-12-31 | 2026-02-26 | 10-K | 26-074833 |
| 2 | assets | us-gaap:Assets | $3.6B | 2025-12-31 | 2026-02-26 | 10-K | 26-074833 |
| 3 | operating income | us-gaap:OperatingIncomeLoss | $313.9M | 2018-12-31 | 2021-02-25 | 10-K | 21-000022 |
| 4 | pretax income | us-gaap:IncomeLossFromContinuingOperationsBeforeInc... | $293.0M | 2018-12-31 | 2021-02-25 | 10-K | 21-000022 |
| 5 | income tax | us-gaap:IncomeTaxExpenseBenefit | $58.8M | 2018-12-31 | 2021-02-25 | 10-K | 21-000022 |
| 6 | total debt | us-gaap:LongTermDebt | $666.8M | 2018-12-31 | 2019-02-27 | 10-K | 19-000013 |
| 7 | book equity | us-gaap:StockholdersEquity | $223.6M | 2018-12-31 | 2022-02-25 | 10-K | 22-000023 |
| 8 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $16.4M | 2018-12-31 | 2019-02-27 | 10-K | 19-000013 |
| 9 | total debt | us-gaap:LongTermDebt | $519.6M | 2017-12-31 | 2019-02-27 | 10-K | 19-000013 |
| 10 | book equity | us-gaap:StockholdersEquity | $223.1M | 2017-12-31 | 2021-02-25 | 10-K | 21-000022 |
| 11 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $29.9M | 2017-12-31 | 2019-02-27 | 10-K | 19-000013 |
| 12 | net income | us-gaap:NetIncomeLoss | $406.4M | 2025-12-31 | 2026-02-26 | 10-K | 26-074833 |
| 13 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $365.9M | 2025-12-31 | 2026-02-26 | 10-K | 26-074833 |
| 14 | assets | us-gaap:Assets | $3.4B | 2024-12-31 | 2026-02-26 | 10-K | 26-074833 |
| 15 | revenue | us-gaap:Revenues | $5.3B | 2025-12-31 | 2026-02-26 | 10-K | 26-074833 |
| 16 | gross profit | us-gaap:GrossProfit | $1.6B | 2024-12-31 | 2026-02-26 | 10-K | 26-074833 |
| 17 | revenue | us-gaap:Revenues | $5.3B | 2024-12-31 | 2026-02-26 | 10-K | 26-074833 |
| 18 | gross profit | us-gaap:GrossProfit | $1.7B | 2023-12-31 | 2026-02-26 | 10-K | 26-074833 |
| 19 | revenue | us-gaap:Revenues | $5.5B | 2023-12-31 | 2026-02-26 | 10-K | 26-074833 |
| 20 | gross profit | us-gaap:GrossProfit | $1.9B | 2022-12-31 | 2025-02-27 | 10-K | 25-000032 |
| 21 | revenue | us-gaap:Revenues | $6.2B | 2022-12-31 | 2025-02-27 | 10-K | 25-000032 |
| 22 | gross profit | us-gaap:GrossProfit | $1.6B | 2021-12-31 | 2024-02-27 | 10-K | 24-000021 |
| 23 | revenue | us-gaap:Revenues | $5.3B | 2021-12-31 | 2024-02-27 | 10-K | 24-000021 |
| 24 | current assets | us-gaap:AssetsCurrent | $2.0B | 2025-12-31 | 2026-02-26 | 10-K | 26-074833 |
| 25 | current liabilities | us-gaap:LiabilitiesCurrent | $880.3M | 2025-12-31 | 2026-02-26 | 10-K | 26-074833 |
| 26 | retained earnings | us-gaap:RetainedEarningsAccumulatedDeficit | $520.7M | 2025-12-31 | 2026-02-26 | 10-K | 26-074833 |
| 27 | operating income | us-gaap:OperatingIncomeLoss | $580.2M | 2025-12-31 | 2026-02-26 | 10-K | 26-074833 |

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| | | | | | | | |
|---|---|---|---|---|---|---|---|
| 28 | book equity | us-gaap:StockholdersEquity | $1.2B | 2025-12-31 | 2026-02-26 | 10-K | 26-074833 |
| 29 | liabilities | us-gaap:Liabilities | $2.4B | 2025-12-31 | 2026-02-26 | 10-K | 26-074833 |
| 30 | depreciation amortization | us-gaap:Depreciation | $26.1M | 2018-12-31 | 2021-02-25 | 10-K | 21-000022 |
| 31 | operating income | us-gaap:OperatingIncomeLoss | $125.1M | 2011-12-31 | 2014-02-27 | 10-K | 14-000019 |
| 32 | interest expense | us-gaap:InterestExpense | $8.0M | 2011-12-31 | 2012-02-29 | 10-K | 12-000018 |
| 33 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $56.3M | 2025-12-31 | 2026-02-26 | 10-K | 26-074833 |
| 34 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $659.2M | 2024-12-31 | 2026-02-26 | 10-K | 26-074833 |
| 35 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $59.5M | 2024-12-31 | 2026-02-26 | 10-K | 26-074833 |
| 36 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $888.2M | 2023-12-31 | 2026-02-26 | 10-K | 26-074833 |
| 37 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $60.1M | 2023-12-31 | 2026-02-26 | 10-K | 26-074833 |
| 38 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $484.9M | 2022-12-31 | 2025-02-27 | 10-K | 25-000032 |
| 39 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $43.6M | 2022-12-31 | 2025-02-27 | 10-K | 25-000032 |
| 40 | depreciation amortization | us-gaap:Depreciation | $42.7M | 2025-12-31 | 2026-02-26 | 10-K | 26-074833 |
| 41 | pretax income | us-gaap:IncomeLossFromContinuingOperationsBeforeInc... | $533.4M | 2025-12-31 | 2026-02-26 | 10-K | 26-074833 |
| 42 | income tax | us-gaap:IncomeTaxExpenseBenefit | $127.1M | 2025-12-31 | 2026-02-26 | 10-K | 26-074833 |
| 43 | current assets | us-gaap:AssetsCurrent | $1.7B | 2024-12-31 | 2026-02-26 | 10-K | 26-074833 |
| 44 | current liabilities | us-gaap:LiabilitiesCurrent | $844.2M | 2024-12-31 | 2026-02-26 | 10-K | 26-074833 |
| 45 | assets | us-gaap:Assets | $3.4B | 2023-12-31 | 2025-02-27 | 10-K | 25-000032 |
| 46 | assets | us-gaap:Assets | $3.6B | 2022-12-31 | 2024-02-27 | 10-K | 24-000021 |
| 47 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 36,787,820 | 2026-02-20 | 2026-02-26 | 10-K | 26-074833 |
| 48 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 37,630,465 | 2025-02-20 | 2025-02-27 | 10-K | 25-000032 |

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