Aramark

ARMK

NYSE; shops; SIC 5812, Retail-Eating Places; CIK 0001584509

D

fourth fifth of 256 graded peers in shops

rank 190 of 256; percentile 74.1; sampling error 2.9 points; lower is stronger

A B C D E

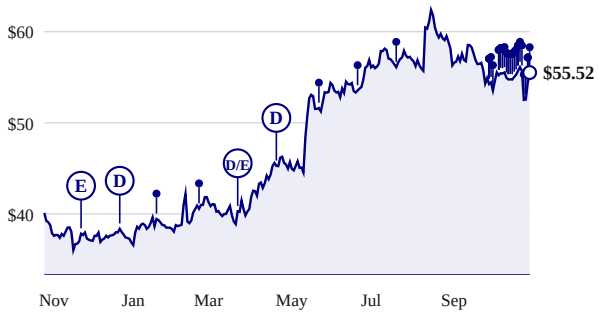
D, the sloth



Scoreboard

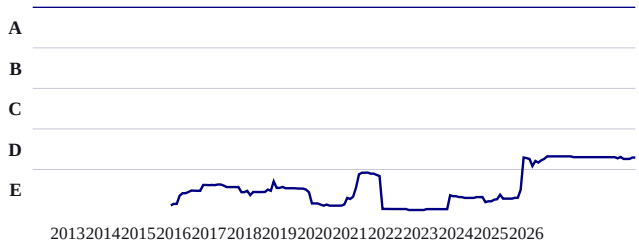
Profitability	C/D percentile 62.3
Solvency	D percentile 76.6
Growth and financing	B/C percentile 41.4
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $13.3B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress
Inputs computable	9 of 14
Graded from	filings received through Nov 25, 2025 337 days before the rescan; latest periodic filing 10-Q received Aug 11, 2026
Last close	$55.52 2026-10-27; market equity $14.6B; 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 Nov 25, 2025

Aramark (the "Company", "we" or "us") is a leading global provider of food and facilities services to education, healthcare, business & industry, and sports, leisure & corrections clients. Our largest market is the United States, which is supplemented by an additional 15-country footprint. We also provide our services on a more limited basis in several additional countries and in offshore locations. Based on total revenue in fiscal 2025, we hold a top 2 position in North America in food and facilities services and a top 3 position in food and facilities services internationally in most countries in which we have significant operations.

The fourteen inputs

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

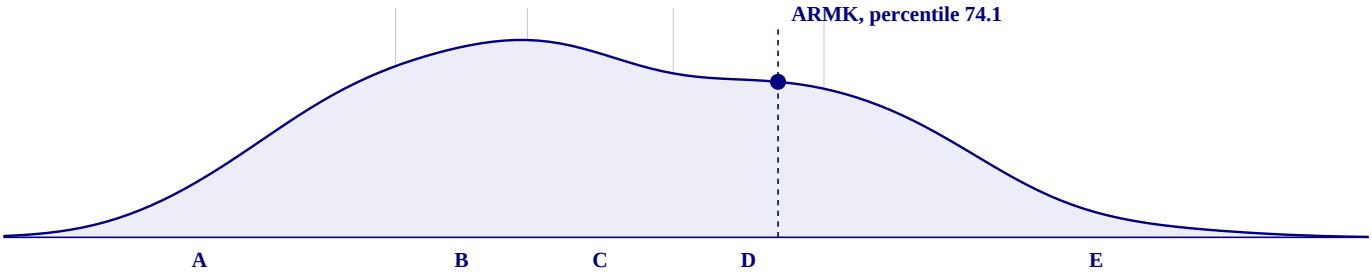
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 62.3						
Gross profitability	not computable	42.0%				
latest aligned inputs end 2022-09-30; latest annual assets end 2025-10-03						
Return on invested capital	8.3%	10.9%		67.5	84	2025-10-03

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.

Accruals ratio	(4.6%)	(4.9%)	57.0	285	2025-10-03
Gross margin stability, five years	not computable	1.2 pts			
latest aligned inputs end 2022-09-30; latest annual assets end 2025-10-03					
Solvency, sleeve percentile 76.6					
Twelve-month failure probability	not computable	0.04%			
liabilities and a nearby cover-page share count are required at 2026-07-03					
Altman Z double-prime	not computable	1.93			
one or more required annual facts are missing					
Net debt to EBITDA	3.73x	1.84x	78.8	100	2025-10-03
Interest coverage	not computable	2.28x			
latest aligned inputs end 2023-09-29; latest annual assets end 2025-10-03					
Current ratio	0.99x	1.38x	74.3	293	2025-10-03
Growth and financing, sleeve percentile 41.4					
Revenue growth, three-year compound	10.6%	1.6%	15.4	267	2025-10-03
Free cash flow growth, three-year compound	4.1%	4.8%	55.5	147	2025-10-03
Reinvestment rate	132.5%	8.4%	8.6	152	2025-10-03
Asset growth, three years	(4.1%)	3.4%	76.6	270	2025-10-03
Net share issuance, one year	(0.4%)	(0.6%)	50.7	208	2025-10-31

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
185	HF Foods Group Inc. (HFFG)	72.2	D	
186	Team Inc. (TISI)	72.5	D	
187	Target Corp. (TGT)	72.9	D	
188	El Pollo Loco Holdings, Inc. (LOCO)	73.3	D	
189	Dave & Buster's Entertainment, Inc. (PLAY)	73.7	D	
190	Aramark (ARMK)	74.1	D	
191	Sherwin Williams Co. (SHW)	74.5	D	
192	Alliance Entertainment Holding Corp. (AENT)	75.1	D	
193	Alliance Entertainment Holding Corp. (AENTW)	75.1	D	
194	Cracker Barrel OLD Country Store, Inc. (CBRL)	75.7	D	
195	Nextnrg, Inc. (NXXT)	76.1	D	dilution, late filer

What the price implies

at the 2026-10-27 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	48.2%	0.7%	86
Distance from 52-week high	(11.0%)	(21.6%)	72
EBIT to enterprise value	3.9%	5.3%	35
Free cash flow yield	3.0%	4.1%	38
Book value to price	0.23	0.34	40

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	1.26	1.65	41
Composite equity issuance, five years	(35.5%)	(16.8%)	16
Relative strength against the sector, log excess return	0.42	0.03	86

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score None of 9, period end 2025-10-03	
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	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$499.4M
Operating cash flow, four quarters	$910.8M
Months of runway	not finite
Days since last periodic filing	78 (10-Q received Aug 11, 2026)
Median daily dollar volume, 63 sessions	$126.1M

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	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$13.7B	2022-09-30	2024-11-19	10-K	24-000212
2	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$14.8B	2022-09-30	2022-11-22	10-K	22-000236
3	assets	us-gaap:Assets	$15.1B	2022-09-30	2023-11-21	10-K	23-000237
4	operating income	us-gaap:OperatingIncomeLoss	$791.8M	2025-10-03	2025-11-25	10-K	25-000219
5	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$430.5M	2025-10-03	2025-11-25	10-K	25-000219
6	income tax	us-gaap:IncomeTaxExpenseBenefit	$103.6M	2025-10-03	2025-11-25	10-K	25-000219
7	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$5.4B	2025-10-03	2025-11-25	10-K	25-000219
8	book equity	us-gaap:StockholdersEquity	$3.1B	2025-10-03	2025-11-25	10-K	25-000219
9	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$639.1M	2025-10-03	2025-11-25	10-K	25-000219
10	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$4.3B	2024-09-27	2025-11-25	10-K	25-000219
11	book equity	us-gaap:StockholdersEquity	$3.0B	2024-09-27	2025-11-25	10-K	25-000219
12	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$672.5M	2024-09-27	2025-11-25	10-K	25-000219
13	net income	us-gaap:NetIncomeLoss	$326.4M	2025-10-03	2025-11-25	10-K	25-000219
14	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesC...	$921.0M	2025-10-03	2025-11-25	10-K	25-000219
15	assets	us-gaap:Assets	$13.3B	2025-10-03	2025-11-25	10-K	25-000219
16	assets	us-gaap:Assets	$12.7B	2024-09-27	2025-11-25	10-K	25-000219
17	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$12.1B	2021-10-01	2023-11-21	10-K	23-000237
18	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$11.0B	2021-10-01	2022-11-22	10-K	22-000236
19	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$12.8B	2020-10-02	2022-11-22	10-K	22-000236
20	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$12.0B	2020-10-02	2022-11-22	10-K	22-000236
21	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$16.2B	2019-09-27	2021-11-23	10-K	21-000256
22	cost of revenue	us-gaap:CostOfRevenue	$15.3B	2019-09-27	2019-11-26	10-K	19-000237
23	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$15.8B	2018-09-28	2020-11-24	10-K	20-000230
24	cost of revenue	us-gaap:CostOfRevenue	$15.0B	2018-09-28	2019-11-26	10-K	19-000237
25	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$476.3M	2025-10-03	2025-11-25	10-K	25-000219
26	operating income	us-gaap:OperatingIncomeLoss	$625.0M	2023-09-29	2025-11-25	10-K	25-000219
27	interest expense	us-gaap:InterestExpense	$441.3M	2023-09-29	2023-11-21	10-K	23-000237

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	current assets	us-gaap:AssetsCurrent	$3.5B	2025-10-03	2025-11-25	10-K	25-000219
29	current liabilities	us-gaap:LiabilitiesCurrent	$3.5B	2025-10-03	2025-11-25	10-K	25-000219
30	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$18.5B	2025-10-03	2025-11-25	10-K	25-000219
31	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$17.4B	2024-09-27	2025-11-25	10-K	25-000219
32	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$16.1B	2023-09-29	2025-11-25	10-K	25-000219
33	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$489.2M	2025-10-03	2025-11-25	10-K	25-000219
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesC...	$726.5M	2024-09-27	2025-11-25	10-K	25-000219
35	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$427.4M	2024-09-27	2025-11-25	10-K	25-000219
36	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$766.4M	2023-09-29	2023-11-21	10-K	23-000237
37	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$383.5M	2023-09-29	2025-11-25	10-K	25-000219
38	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$694.5M	2022-09-30	2023-11-21	10-K	23-000237
39	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$311.9M	2022-09-30	2024-11-19	10-K	24-000212
40	current assets	us-gaap:AssetsCurrent	$3.4B	2024-09-27	2025-11-25	10-K	25-000219
41	current liabilities	us-gaap:LiabilitiesCurrent	$4.2B	2024-09-27	2025-11-25	10-K	25-000219
42	assets	us-gaap:Assets	$16.9B	2023-09-29	2024-11-19	10-K	24-000212
43	shares outstanding	dei:EntityCommonStockSharesOutstanding	262,934,101	2025-10-31	2025-11-25	10-K	25-000219
44	shares outstanding	dei:EntityCommonStockSharesOutstanding	263,947,698	2024-10-25	2024-11-19	10-K	24-000212

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.