Best BUY Co. Inc.

BBY

NYSE; shops; SIC 5731, Retail-Radio, Tv & Consumer Electronics Stores; CIK 0000764478

A

strongest fifth of 256 graded peers in shops

rank 22 of 256; percentile 8.2; sampling error 2.9 points; lower is stronger

A B C D E

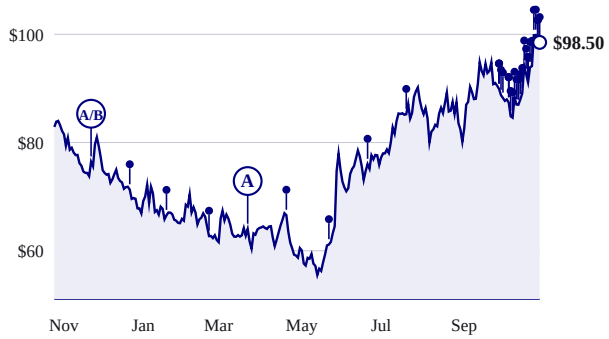
A, the bull



Scoreboard

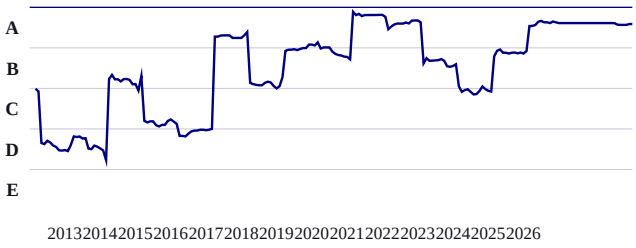
Profitability	A/B percentile 21.7
Solvency	B percentile 27.0
Growth and financing	C percentile 49.6
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $14.7B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered; fortress balance sheet not computable: distress
Inputs computable	12 of 14
Graded from	filings received through Mar 18, 2026 224 days before the rescan; latest periodic filing 10-Q received Sep 4, 2026
Last close	$98.49 2026-10-27; market equity $20.7B; 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 Mar 18, 2026

Unless the context otherwise requires, the terms "we," "us," "our" and the "company" in this Annual Report on Form 10-K refer to Best Buy Co., Inc. and, as applicable, its consolidated subsidiaries. Any references to our website addresses do not constitute incorporation by reference of the information contained on the websites. We were incorporated in the state of Minnesota in 1966. We are driven by our purpose to enrich lives through technology and our vision to personalize and humanize technology solutions for every stage of life.

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 21.7						
Gross profitability	63.9%	42.0%		22.6	240	2026-01-31
Return on invested capital	44.2%	10.9%		12.0	84	2026-01-31
Accruals ratio	(6.1%)	(4.9%)		42.6	285	2026-01-31

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Gross margin stability, five years	0.4 pts	1.2 pts		9.7	218	2026-01-31
Solvency, sleeve percentile 27.0						
Twelve-month failure probability	not computable	0.04%				
liabilities and a nearby cover-page share count are required at 2026-08-01						
Altman Z double-prime	not computable	1.93				
one or more required annual facts are missing						
Net debt to EBITDA	(0.26x)	1.84x		10.1	100	2026-01-31
Interest coverage	29.55x	2.28x		4.8	63	2026-01-31
Current ratio	1.11x	1.38x		66.1	293	2026-01-31
Growth and financing, sleeve percentile 49.6						
Revenue growth, three-year compound	(3.4%)	1.6%		70.3	267	2026-01-31
Free cash flow growth, three-year compound	12.1%	4.8%		37.0	147	2026-01-31
Reinvestment rate	46.4%	8.4%		28.5	152	2026-01-31
Asset growth, three years	(2.4%)	3.4%		71.0	270	2026-01-31
Net share issuance, one year	(1.1%)	(0.6%)		41.1	208	2026-03-16

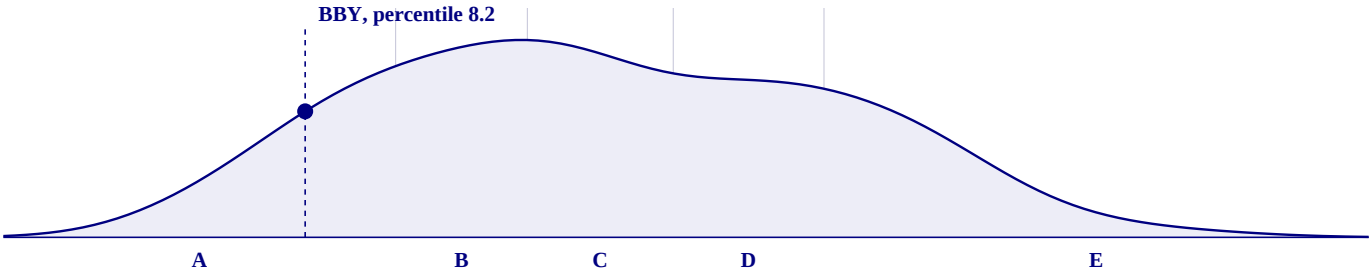
Warnings

1 of 7 checks triggered; none of them enters the letter

Check	Measured
Fortress balance sheet	cash minus debt is 573,000,000 USD; Altman Z is not used

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
17	W.W. Grainger, Inc. (GWW)	6.3	A	
18	Rave Restaurant Group, Inc. (RAVE)	6.7	A	
19	Winmark Corp. (WINA)	7.1	A	
20	Applied Industrial Technologies Inc. (AIT)	7.5	A	
21	Urban Outfitters Inc. (URBN)	7.8	A	
22	Best BUY Co. Inc. (BBY)	8.2	A	fortress balance sheet
23	QXO, Inc. (QXO)	8.8	A	
24	QXO, Inc. (QXO-PB)	8.8	A	
25	FirstCash Holdings, Inc. (FCFS)	9.4	A	
26	Ulta Beauty, Inc. (ULTA)	9.8	A	
27	Watsco Inc. (WSO)	10.4	A	fortress balance sheet

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	9.3%	0.7%	61
Distance from 52-week high	(1.4%)	(21.6%)	96
EBIT to enterprise value	7.1%	5.3%	73

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Free cash flow yield	6.1%	4.1%	67
Book value to price	0.15	0.34	30
Sales to price	2.02	1.65	56
Composite equity issuance, five years	(41.1%)	(16.8%)	10
Relative strength against the sector, log excess return	0.11	0.03	61

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 7 of 9, period end 2026-01-31	
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	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$2.3B
Operating cash flow, four quarters	$2.5B
Months of runway	not finite
Days since last periodic filing	54 (10-Q received Sep 4, 2026)
Median daily dollar volume, 63 sessions	$272.4M

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	$9.4B	2026-01-31	2026-03-18	10-K	26-000009
2	assets	us-gaap:Assets	$14.7B	2026-01-31	2026-03-18	10-K	26-000009
3	operating income	us-gaap:OperatingIncomeLoss	$1.4B	2026-01-31	2026-03-18	10-K	26-000009
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$1.4B	2026-01-31	2026-03-18	10-K	26-000009
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$337.0M	2026-01-31	2026-03-18	10-K	26-000009
6	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$1.2B	2026-01-31	2026-03-18	10-K	26-000009
7	book equity	us-gaap:StockholdersEquity	$3.0B	2026-01-31	2026-03-18	10-K	26-000009
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$1.7B	2026-01-31	2026-03-18	10-K	26-000009
9	total debt	us-gaap:LongTermDebt	$1.2B	2025-02-01	2025-03-19	10-K	25-000007
10	book equity	us-gaap:StockholdersEquity	$2.8B	2025-02-01	2026-03-18	10-K	26-000009
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$1.6B	2025-02-01	2026-03-18	10-K	26-000009
12	net income	us-gaap:NetIncomeLoss	$1.1B	2026-01-31	2026-03-18	10-K	26-000009
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$2.0B	2026-01-31	2026-03-18	10-K	26-000009
14	assets	us-gaap:Assets	$14.8B	2025-02-01	2026-03-18	10-K	26-000009
15	revenue	us-gaap:Revenues	$41.7B	2026-01-31	2026-03-18	10-K	26-000009
16	gross profit	us-gaap:GrossProfit	$9.4B	2025-02-01	2026-03-18	10-K	26-000009
17	revenue	us-gaap:Revenues	$41.5B	2025-02-01	2026-03-18	10-K	26-000009
18	gross profit	us-gaap:GrossProfit	$9.6B	2024-02-03	2026-03-18	10-K	26-000009
19	revenue	us-gaap:Revenues	$43.5B	2024-02-03	2026-03-18	10-K	26-000009
20	gross profit	us-gaap:GrossProfit	$9.9B	2023-01-28	2025-03-19	10-K	25-000007
21	revenue	us-gaap:Revenues	$46.3B	2023-01-28	2025-03-19	10-K	25-000007
22	gross profit	us-gaap:GrossProfit	$11.6B	2022-01-29	2024-03-15	10-K	24-000010
23	revenue	us-gaap:Revenues	$51.8B	2022-01-29	2024-03-15	10-K	24-000010
24	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$831.0M	2026-01-31	2026-03-18	10-K	26-000009
25	interest expense	us-gaap:InterestExpense	$47.0M	2026-01-31	2026-03-18	10-K	26-000009

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26	current assets	us-gaap:AssetsCurrent	$8.5B	2026-01-31	2026-03-18	10-K	26-000009
27	current liabilities	us-gaap:LiabilitiesCurrent	$7.7B	2026-01-31	2026-03-18	10-K	26-000009
28	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$704.0M	2026-01-31	2026-03-18	10-K	26-000009
29	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$2.1B	2025-02-01	2026-03-18	10-K	26-000009
30	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$706.0M	2025-02-01	2026-03-18	10-K	26-000009
31	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$1.5B	2024-02-03	2026-03-18	10-K	26-000009
32	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$795.0M	2024-02-03	2026-03-18	10-K	26-000009
33	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$1.8B	2023-01-28	2025-03-19	10-K	25-000007
34	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$930.0M	2023-01-28	2025-03-19	10-K	25-000007
35	current assets	us-gaap:AssetsCurrent	$8.2B	2025-02-01	2026-03-18	10-K	26-000009
36	current liabilities	us-gaap:LiabilitiesCurrent	$8.0B	2025-02-01	2026-03-18	10-K	26-000009
37	assets	us-gaap:Assets	$15.0B	2024-02-03	2025-03-19	10-K	25-000007
38	assets	us-gaap:Assets	$15.8B	2023-01-28	2025-03-19	10-K	25-000007
39	shares outstanding	dei:EntityCommonStockSharesOutstanding	209,112,577	2026-03-16	2026-03-18	10-K	26-000009
40	shares outstanding	dei:EntityCommonStockSharesOutstanding	211,369,657	2025-03-17	2025-03-19	10-K	25-000007

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