Guardian Pharmacy Services, Inc. GRDN

NYSE; shops; SIC 5912, Retail-Drug Stores and Proprietary Stores; CIK 0001802255

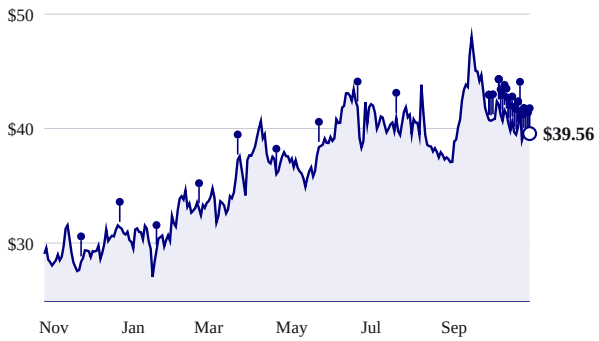
None

No letter

4 of 14 inputs computable; 7 are required, with a score in every sleeve

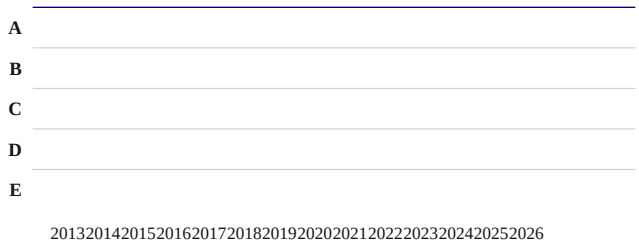
Scoreboard	
Reliability	0.87 AUC filers with $120M to $591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025
Peer failure rate	1.03% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$120M to $591M assets total assets $412.7M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	thin data; fortress balance sheet not computable: dilution, distress
Inputs computable	4 of 14
Graded from	filings received through Mar 11, 2026 231 days before the rescan; latest periodic filing 10-Q received Aug 6, 2026
Last close	$39.59 2026-10-27; market equity $0; 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 11, 2026

We are a leading, highly differentiated pharmacy services company that provides an extensive suite of technology-enabled services designed to help residents of LTCFs adhere to their appropriate drug regimen, which in turn helps reduce the cost of care and improve clinical outcomes. We emphasize high-touch, individualized clinical, drug dispensing and administration capabilities that are tailored to serve the needs of residents in historically lower acuity LTCFs, such as assisted living facilities ("ALFs"), and behavioral health facilities and group homes (collectively "BHFs").

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 18.0						
Gross profitability	70.9%	42.0%		18.0	240	2025-12-31
Return on invested capital	not computable	10.9%				

a prior annual debt, equity, and cash observation is required

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Accruals ratio	not computable	(4.9%)				
a prior annual assets observation is required						
Gross margin stability, five years	not computable	1.2 pts				
five annual gross margins are required; found 1						
Solvency, sleeve percentile 27.4						
Twelve-month failure probability	not computable	0.04%				
liabilities and a nearby cover-page share count are required at 2026-06-30						
Altman Z double-prime	3.85	1.93		25.5	205	2025-12-31
Net debt to EBITDA	(0.69x)	1.84x		7.1	100	2025-12-31
Interest coverage	not computable	2.28x				
one or more required annual facts are missing						
Current ratio	1.38x	1.38x		49.7	293	2025-12-31
Growth and financing						
Revenue growth, three-year compound	not computable	1.6%				
four annual observations are required; found 1						
Free cash flow growth, three-year compound	not computable	4.8%				
four consecutive annual FCF observations are required; found 1						
Reinvestment rate	not computable	8.4%				
a prior annual working-capital observation is required						
Asset growth, three years	not computable	3.4%				
four annual observations are required; found 1						
Net share issuance, one year	not computable	(0.6%)				
two annual share counts are required; found 0						

Warnings

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

Check	Measured
Thin data	4 of 14 grade factors are computable; minimum is 7
Fortress balance sheet	cash minus debt is 65,619,000 USD; Altman Z is not used

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	41.4%	0.7%	85
Distance from 52-week high	(17.6%)	(21.6%)	56
EBIT to enterprise value	not computable	5.3%	
Free cash flow yield	not computable	4.1%	
Book value to price	not computable	0.34	
Sales to price	not computable	1.65	
Composite equity issuance, five years	not computable	(16.8%)	
Relative strength against the sector, log excess return	0.37	0.03	85

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	fail
Operating cash flow above zero	pass
Return on assets improved	fail
Operating cash flow exceeds net income	pass
Long-term leverage fell	fail
Current ratio improved	fail

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No new shares issued	fail
Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$89.8M
Operating cash flow, four quarters	$98.9M
Months of runway	not finite
Days since last periodic filing	83 (10-Q received Aug 6, 2026)
Median daily dollar volume, 63 sessions	$17.1M

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	gross profit	us-gaap:GrossProfit	$292.7M	2025-12-31	2026-03-11	10-K	26-102172
2	assets	us-gaap:Assets	$412.7M	2025-12-31	2026-03-11	10-K	26-102172
3	operating income	us-gaap:OperatingIncomeLoss	$72.7M	2025-12-31	2026-03-11	10-K	26-102172
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$73.4M	2025-12-31	2026-03-11	10-K	26-102172
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$24.5M	2025-12-31	2026-03-11	10-K	26-102172
6	total debt	us-gaap:LongTermDebt	$0	2025-12-31	2026-03-11	10-K	26-102172
7	book equity	us-gaap:StockholdersEquityIncludingPortionAttributableT...	$217.9M	2025-12-31	2026-03-11	10-K	26-102172
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$65.6M	2025-12-31	2026-03-11	10-K	26-102172
9	net income	us-gaap:NetIncomeLoss	$49.2M	2025-12-31	2026-03-11	10-K	26-102172
10	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$100.3M	2025-12-31	2026-03-11	10-K	26-102172
11	current assets	us-gaap:AssetsCurrent	$221.6M	2025-12-31	2026-03-11	10-K	26-102172
12	current liabilities	us-gaap:LiabilitiesCurrent	$160.7M	2025-12-31	2026-03-11	10-K	26-102172
13	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$66.3M	2025-12-31	2026-03-11	10-K	26-102172
14	liabilities	us-gaap:Liabilities	$194.7M	2025-12-31	2026-03-11	10-K	26-102172
15	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$22.3M	2025-12-31	2026-03-11	10-K	26-102172
16	revenue	us-gaap:Revenues	$1.4B	2025-12-31	2026-03-11	10-K	26-102172
17	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$13.4M	2025-12-31	2026-03-11	10-K	26-102172

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