# SiteOne Landscape Supply, Inc.

**SITE**

NYSE; shops; SIC 5040, Wholesale-Professional & Commercial Equipment & Supplies; CIK 0001650729

**A**

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

rank 12 of 256; percentile 4.3; sampling error 2.9 points; lower is stronger

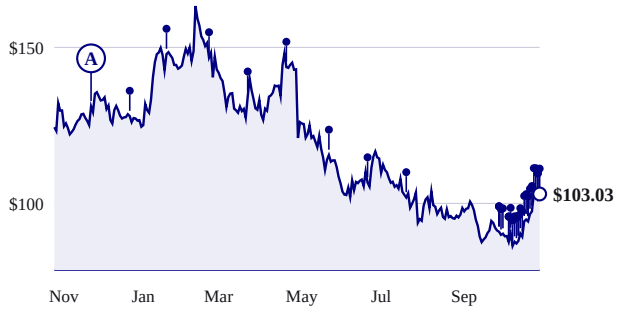
A B C D E

**A, the bull**



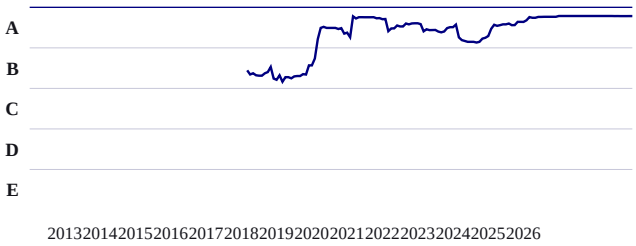
| Scoreboard | |
|---|---|
| **Profitability** | B/C<br>percentile 37.4 |
| **Solvency** | A/B<br>percentile 18.8 |
| **Growth and financing** | B<br>percentile 34.3 |
| **Reliability** | 0.94 AUC<br>filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025 |
| **Peer failure 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 $3.2B |
| **Standard universe** | inside<br>revenue above $1M and assets above $10M |
| **Warnings** | none triggered<br>not computable: distress |
| **Inputs computable** | 10 of 14 |
| **Graded from** | filings received through Feb 19, 2026<br>251 days before the rescan; latest periodic filing 10-Q received Jul 29, 2026 |
| **Last close** | $102.96<br>2026-10-27; market equity $4.6B; 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 Feb 19, 2026*

The following discussion of our business contains "forward-looking statements," as discussed in "Special Note Regarding Forward-Looking Statements and Information" above. Our business, operations, and financial condition are subject to various risks as set forth in Part I,

## 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 37.4** | | | | | | |
| Gross profitability | 50.8% | 42.0% | | 35.6 | 240 | 2025-12-28 |
| Return on invested capital | 10.0% | 10.9% | | 53.0 | 84 | 2025-12-28 |
| Accruals ratio | (4.7%) | (4.9%) | | 54.9 | 285 | 2025-12-28 |
| Gross margin stability, five years | 0.3 pts | 1.2 pts | | 6.0 | 218 | 2025-12-28 |
| **Solvency, sleeve percentile 18.8** | | | | | | |

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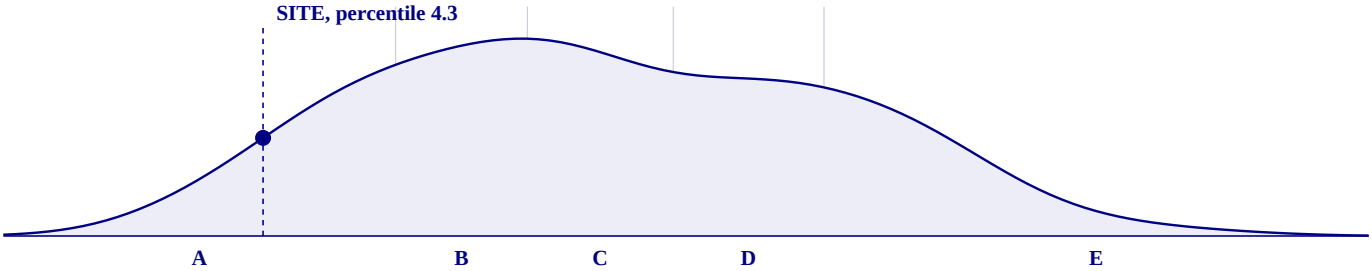
| | | | | | | |
|---|---|---|---|---|---|---|
| Twelve-month failure probability | not computable | 0.04% | | | | |
| *four consecutive discrete net-income quarters are required; found 4* | | | | | | |
| Altman Z double-prime | 4.90 | 1.93 | | 16.7 | 205 | 2025-12-28 |
| Net debt to EBITDA | not computable | 1.84x | | | | |
| *latest aligned inputs end 2018-12-30; latest annual assets end 2025-12-28* | | | | | | |
| Interest coverage | not computable | 2.28x | | | | |
| *latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-28* | | | | | | |
| Current ratio | 2.47x | 1.38x | | 20.9 | 293 | 2025-12-28 |
| **Growth and financing, sleeve percentile 34.3** | | | | | | |
| Revenue growth, three-year compound | 5.4% | 1.6% | | 29.7 | 267 | 2025-12-28 |
| Free cash flow growth, three-year compound | 9.1% | 4.8% | | 41.8 | 147 | 2025-12-28 |
| Reinvestment rate | not computable | 8.4% | | | | |
| *latest aligned inputs end 2018-12-30; latest annual assets end 2025-12-28* | | | | | | |
| Asset growth, three years | 8.3% | 3.4% | | 26.0 | 270 | 2025-12-28 |
| Net share issuance, one year | (1.1%) | (0.6%) | | 39.6 | 208 | 2026-02-13 |

## 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 |
|---|---|---|---|---|
| 7 | Brinker International, Inc. (EAT) | 2.4 | A | |
| 8 | Fastenal Co. (FAST) | 2.7 | 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 | Weis Markets Inc. (WMK) | 5.9 | A | late filer |
| 17 | W.W. Grainger, Inc. (GWW) | 6.3 | A | |

## 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 | (23.5%) | 0.7% | 26 |
| Distance from 52-week high | (36.9%) | (21.6%) | 30 |
| EBIT to enterprise value | 4.7% | 5.3% | 42 |
| Free cash flow yield | 5.4% | 4.1% | 63 |
| Book value to price | 0.36 | 0.34 | 51 |
| Sales to price | 1.03 | 1.65 | 36 |
| Composite equity issuance, five years | (0.10%) | (16.8%) | 78 |
| Relative strength against the sector, log excess return | (0.24) | 0.03 | 26 |

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## Diagnostics

*shown on every report; none enters the grade*

| Measure | Value |
|---|---|
| **Piotroski F-score 8 of 9, period end 2025-12-28** | |
| 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 | pass |
| Current ratio improved | pass |
| No new shares issued | pass |
| Gross margin improved | pass |
| Asset turnover improved | fail |
| **Cash, filings, liquidity** | |
| Cash and equivalents | $84.0M |
| Operating cash flow, four quarters | $308.0M |
| Months of runway | not finite |
| Days since last periodic filing | 91 (10-Q received Jul 29, 2026) |
| Median daily dollar volume, 63 sessions | $82.7M |

## 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 | 2025-12-28 | 2026-02-19 | 10-K | 26-000005 |
| 2 | assets | us-gaap:Assets | $3.2B | 2025-12-28 | 2026-02-19 | 10-K | 26-000005 |
| 3 | operating income | us-gaap:OperatingIncomeLoss | $238.1M | 2025-12-28 | 2026-02-19 | 10-K | 26-000005 |
| 4 | pretax income | us-gaap:IncomeLossFromContinuingOperationsBeforeInc... | $203.1M | 2025-12-28 | 2026-02-19 | 10-K | 26-000005 |
| 5 | income tax | us-gaap:IncomeTaxExpenseBenefit | $45.7M | 2025-12-28 | 2026-02-19 | 10-K | 26-000005 |
| 6 | total debt | us-gaap:LongTermDebt | $385.4M | 2025-12-28 | 2026-02-19 | 10-K | 26-000005 |
| 7 | book equity | us-gaap:StockholdersEquity | $1.7B | 2025-12-28 | 2026-02-19 | 10-K | 26-000005 |
| 8 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $190.6M | 2025-12-28 | 2026-02-19 | 10-K | 26-000005 |
| 9 | total debt | us-gaap:LongTermDebt | $388.2M | 2024-12-29 | 2026-02-19 | 10-K | 26-000005 |
| 10 | book equity | us-gaap:StockholdersEquity | $1.6B | 2024-12-29 | 2026-02-19 | 10-K | 26-000005 |
| 11 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $107.1M | 2024-12-29 | 2026-02-19 | 10-K | 26-000005 |
| 12 | net income | us-gaap:NetIncomeLoss | $151.8M | 2025-12-28 | 2026-02-19 | 10-K | 26-000005 |
| 13 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $300.5M | 2025-12-28 | 2026-02-19 | 10-K | 26-000005 |
| 14 | assets | us-gaap:Assets | $3.1B | 2024-12-29 | 2026-02-19 | 10-K | 26-000005 |
| 15 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $4.7B | 2025-12-28 | 2026-02-19 | 10-K | 26-000005 |
| 16 | gross profit | us-gaap:GrossProfit | $1.6B | 2024-12-29 | 2026-02-19 | 10-K | 26-000005 |
| 17 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $4.5B | 2024-12-29 | 2026-02-19 | 10-K | 26-000005 |
| 18 | gross profit | us-gaap:GrossProfit | $1.5B | 2023-12-31 | 2026-02-19 | 10-K | 26-000005 |
| 19 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $4.3B | 2023-12-31 | 2026-02-19 | 10-K | 26-000005 |
| 20 | gross profit | us-gaap:GrossProfit | $1.4B | 2023-01-01 | 2025-02-20 | 10-K | 25-000004 |
| 21 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $4.0B | 2023-01-01 | 2025-02-20 | 10-K | 25-000004 |
| 22 | gross profit | us-gaap:GrossProfit | $1.2B | 2022-01-02 | 2024-02-22 | 10-K | 24-000004 |
| 23 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $3.5B | 2022-01-02 | 2024-02-22 | 10-K | 24-000004 |
| 24 | current assets | us-gaap:AssetsCurrent | $1.7B | 2025-12-28 | 2026-02-19 | 10-K | 26-000005 |
| 25 | current liabilities | us-gaap:LiabilitiesCurrent | $686.8M | 2025-12-28 | 2026-02-19 | 10-K | 26-000005 |
| 26 | retained earnings | us-gaap:RetainedEarningsAccumulatedDeficit | $1.2B | 2025-12-28 | 2026-02-19 | 10-K | 26-000005 |
| 27 | liabilities | us-gaap:Liabilities | $1.5B | 2025-12-28 | 2026-02-19 | 10-K | 26-000005 |
| 28 | total debt | us-gaap:LongTermDebt | $558.2M | 2018-12-30 | 2020-02-26 | 10-K | 20-000004 |
| 29 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $17.3M | 2018-12-30 | 2020-02-26 | 10-K | 20-000004 |
| 30 | operating income | us-gaap:OperatingIncomeLoss | $107.3M | 2018-12-30 | 2021-03-03 | 10-K | 21-000006 |
| 31 | depreciation amortization | us-gaap:Depreciation | $21.5M | 2018-12-30 | 2019-02-27 | 10-K | 19-000004 |

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| | | | | | | | |
|---|---|---|---|---|---|---|---|
| 32 | operating income | us-gaap:OperatingIncomeLoss | $250.3M | 2023-12-31 | 2026-02-19 | 10-K | 26-000005 |
| 33 | interest expense | us-gaap:InterestExpense | $27.1M | 2023-12-31 | 2024-02-22 | 10-K | 24-000004 |
| 34 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $53.7M | 2025-12-28 | 2026-02-19 | 10-K | 26-000005 |
| 35 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $283.4M | 2024-12-29 | 2026-02-19 | 10-K | 26-000005 |
| 36 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $40.5M | 2024-12-29 | 2026-02-19 | 10-K | 26-000005 |
| 37 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $297.5M | 2023-12-31 | 2026-02-19 | 10-K | 26-000005 |
| 38 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $32.1M | 2023-12-31 | 2026-02-19 | 10-K | 26-000005 |
| 39 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $217.2M | 2023-01-01 | 2025-02-20 | 10-K | 25-000004 |
| 40 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $27.1M | 2023-01-01 | 2025-02-20 | 10-K | 25-000004 |
| 41 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $14.9M | 2018-12-30 | 2021-03-03 | 10-K | 21-000006 |
| 42 | pretax income | us-gaap:IncomeLossFromContinuingOperationsBeforeInc... | $75.2M | 2018-12-30 | 2021-03-03 | 10-K | 21-000006 |
| 43 | income tax | us-gaap:IncomeTaxExpenseBenefit | $1.3M | 2018-12-30 | 2021-03-03 | 10-K | 21-000006 |
| 44 | current assets | us-gaap:AssetsCurrent | $765.4M | 2018-12-30 | 2020-02-26 | 10-K | 20-000004 |
| 45 | current liabilities | us-gaap:LiabilitiesCurrent | $282.4M | 2018-12-30 | 2020-02-26 | 10-K | 20-000004 |
| 46 | current assets | us-gaap:AssetsCurrent | $601.9M | 2017-12-31 | 2019-02-27 | 10-K | 19-000004 |
| 47 | current liabilities | us-gaap:LiabilitiesCurrent | $205.8M | 2017-12-31 | 2019-02-27 | 10-K | 19-000004 |
| 48 | assets | us-gaap:Assets | $2.8B | 2023-12-31 | 2025-02-20 | 10-K | 25-000004 |
| 49 | assets | us-gaap:Assets | $2.5B | 2023-01-01 | 2024-02-22 | 10-K | 24-000004 |
| 50 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 44,459,316 | 2026-02-13 | 2026-02-19 | 10-K | 26-000005 |
| 51 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 44,964,924 | 2025-02-14 | 2025-02-20 | 10-K | 25-000004 |

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