GXO Logistics, Inc.

GXO

NYSE; other; SIC 4700, Transportation Services; CIK 0001852244

E

weakest fifth of 335 graded peers in other

rank 290 of 335; percentile 86.5; sampling error 2.6 points; lower is stronger

A B C D E

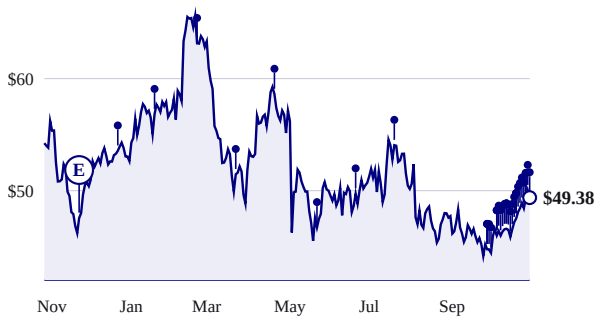
E, the bear



Scoreboard

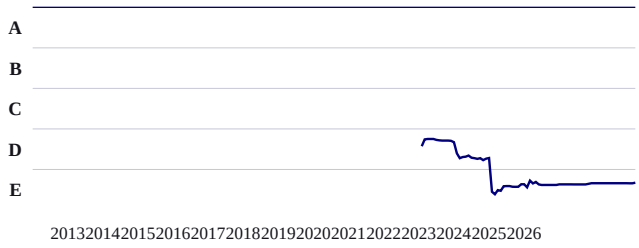
Profitability	D percentile 73.8
Solvency	C/D percentile 60.8
Growth and financing	C percentile 48.9
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $12.3B
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 Feb 25, 2026 246 days before the rescan; latest periodic filing 10-Q received Aug 5, 2026
Last close	$49.41 2026-10-28; market equity $5.7B; 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 Feb 25, 2026

GXO Logistics, Inc., together with its subsidiaries ("GXO," the "Company," "our," or "we"), is the largest pure-play contract logistics provider in the world and a foremost innovator in the industry. We provide our customers with high-value-added warehousing and distribution, order fulfillment, e-commerce, reverse logistics and other supply chain services differentiated by our ability to deliver technology-enabled, customized solutions at scale.

The fourteen inputs

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

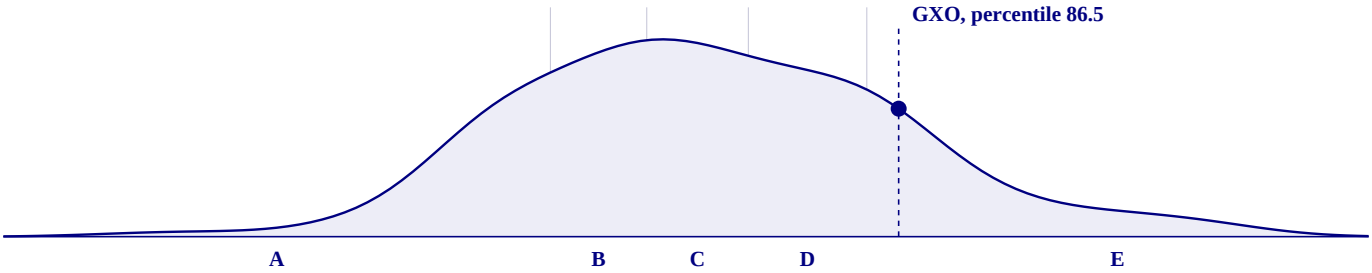
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 73.8						
Gross profitability	not computable	27.0%				
one or more required annual facts are missing						
Return on invested capital	1.7%	10.0%		80.0	151	2025-12-31
Accruals ratio	(3.4%)	(5.8%)		67.5	503	2025-12-31

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.

Gross margin stability, five years	not computable	2.2 pts				
five annual gross margins are required; found 0						
Solvency, sleeve percentile 60.8						
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	not computable	2.05				
one or more required annual facts are missing						
Net debt to EBITDA	2.51x	2.52x		49.2	182	2025-12-31
Interest coverage	not computable	2.45x				
latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31						
Current ratio	0.85x	1.33x		72.3	507	2025-12-31
Growth and financing, sleeve percentile 48.9						
Revenue growth, three-year compound	13.6%	5.1%		22.8	400	2025-12-31
Free cash flow growth, three-year compound	(18.1%)	8.8%		80.0	221	2025-12-31
Reinvestment rate	(202.8%)	11.6%		94.2	191	2025-12-31
Asset growth, three years	10.0%	4.2%		26.6	437	2025-12-31
Net share issuance, one year	(4.0%)	(0.5%)		20.7	353	2026-02-20

Among 335 peers

other; 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
285	Target Hospitality Corp. (TH)	85.0	E	late filer, fortress balance sheet
286	CSX Corp. (CSX)	85.3	E	
287	RXO, Inc. (RXO)	85.6	E	
288	Forward AIR Corp. (FWRD)	85.9	E	late filer
289	Advantage Solutions Inc. (ADV)	86.2	E	
290	GXO Logistics, Inc. (GXO)	86.5	E	
291	Xenia Hotels & Resorts, Inc. (XHR)	86.8	E	
292	Monro, Inc. (MNRO)	87.1	E	
293	Enbridge Inc. (ENB)	87.4	E	
294	Comscore, Inc. (SCOR)	87.7	E	dilution
295	Plains ALL American Pipeline L.P. (PAA)	88.0	E	

What the price implies

at the 2026-10-28 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(9.8%)	2.0%	39
Distance from 52-week high	(24.7%)	(26.4%)	53
EBIT to enterprise value	3.3%	4.3%	33
Free cash flow yield	1.9%	4.2%	31
Book value to price	0.53	0.34	69
Sales to price	2.33	0.71	82

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.

Composite equity issuance, five years	not computable	(8.9%)	
Relative strength against the sector, log excess return	(0.25)	(0.13)	39

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	pass
Operating cash flow above zero	pass
Return on assets improved	fail
Operating cash flow exceeds net income	pass
Long-term leverage fell	pass
Current ratio improved	pass
No new shares issued	pass
Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$769.0M
Operating cash flow, four quarters	$509.0M
Months of runway	not finite
Days since last periodic filing	85 (10-Q received Aug 5, 2026)
Median daily dollar volume, 63 sessions	$54.8M

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	operating income	us-gaap:OperatingIncomeLoss	$245.0M	2025-12-31	2026-02-25	10-K	26-000007
2	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$104.0M	2025-12-31	2026-02-25	10-K	26-000007
3	income tax	us-gaap:IncomeTaxExpenseBenefit	$68.0M	2025-12-31	2026-02-25	10-K	26-000007
4	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$2.6B	2025-12-31	2026-02-25	10-K	26-000007
5	book equity	us-gaap:StockholdersEquity	$3.0B	2025-12-31	2026-02-25	10-K	26-000007
6	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$854.0M	2025-12-31	2026-02-25	10-K	26-000007
7	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$2.5B	2024-12-31	2026-02-25	10-K	26-000007
8	book equity	us-gaap:StockholdersEquity	$3.0B	2024-12-31	2026-02-25	10-K	26-000007
9	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$413.0M	2024-12-31	2026-02-25	10-K	26-000007
10	net income	us-gaap:NetIncomeLoss	$32.0M	2025-12-31	2026-02-25	10-K	26-000007
11	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$434.0M	2025-12-31	2026-02-25	10-K	26-000007
12	assets	us-gaap:Assets	$12.3B	2025-12-31	2026-02-25	10-K	26-000007
13	assets	us-gaap:Assets	$11.3B	2024-12-31	2026-02-25	10-K	26-000007
14	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$457.0M	2025-12-31	2026-02-25	10-K	26-000007
15	operating income	us-gaap:OperatingIncomeLoss	$318.0M	2023-12-31	2026-02-25	10-K	26-000007
16	interest expense	us-gaap:InterestExpense	$53.0M	2023-12-31	2024-02-15	10-K	24-000007
17	current assets	us-gaap:AssetsCurrent	$3.3B	2025-12-31	2026-02-25	10-K	26-000007
18	current liabilities	us-gaap:LiabilitiesCurrent	$3.9B	2025-12-31	2026-02-25	10-K	26-000007
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$13.2B	2025-12-31	2026-02-25	10-K	26-000007
20	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$11.7B	2024-12-31	2026-02-25	10-K	26-000007
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$9.8B	2023-12-31	2026-02-25	10-K	26-000007
22	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$9.0B	2022-12-31	2025-02-18	10-K	25-000007
23	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$324.0M	2025-12-31	2026-02-25	10-K	26-000007
24	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$549.0M	2024-12-31	2026-02-25	10-K	26-000007
25	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$359.0M	2024-12-31	2026-02-25	10-K	26-000007
26	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$558.0M	2023-12-31	2026-02-25	10-K	26-000007
27	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$274.0M	2023-12-31	2026-02-25	10-K	26-000007
28	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$542.0M	2022-12-31	2025-02-18	10-K	25-000007
29	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$342.0M	2022-12-31	2025-02-18	10-K	25-000007

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.

30	current assets	us-gaap:AssetsCurrent	$2.6B	2024-12-31	2026-02-25	10-K	26-000007
31	current liabilities	us-gaap:LiabilitiesCurrent	$3.2B	2024-12-31	2026-02-25	10-K	26-000007
32	assets	us-gaap:Assets	$9.5B	2023-12-31	2025-02-18	10-K	25-000007
33	assets	us-gaap:Assets	$9.2B	2022-12-31	2024-02-15	10-K	24-000007
34	shares outstanding	dei:EntityCommonStockSharesOutstanding	114,713,579	2026-02-20	2026-02-25	10-K	26-000007
35	shares outstanding	dei:EntityCommonStockSharesOutstanding	119,518,035	2025-02-13	2025-02-18	10-K	25-000007

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.