LKQ Corp.

LKQ

Nasdaq; shops; SIC 5010, Wholesale-Motor Vehicles & Motor Vehicle Parts & Supplies; CIK 0001065696

C

middle fifth of 256 graded peers in shops

rank 118 of 256; percentile 45.9; sampling error 2.9 points; lower is stronger

A B C D E

C, the tortoise



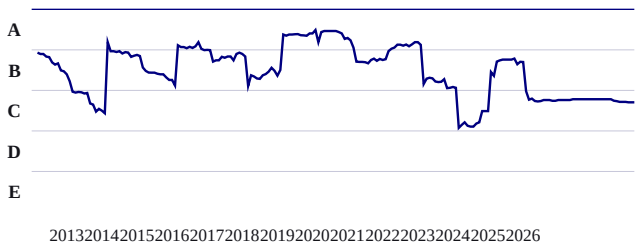
Scoreboard	
Profitability	C percentile 55.8
Solvency	B percentile 36.3
Growth and financing	C percentile 51.6
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $15.1B
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 19, 2026 252 days before the rescan; latest periodic filing 10-Q received Jul 30, 2026
Last close	$17.19 2026-10-28; market equity $4.3B; 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

LKQ Corporation ("LKQ," the "Company" or "we") is a global distributor of vehicle products, including replacement parts, components and systems used in the repair and maintenance of vehicles, and specialty aftermarket products and accessories to improve the performance, functionality and appearance of vehicles.

The fourteen inputs

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

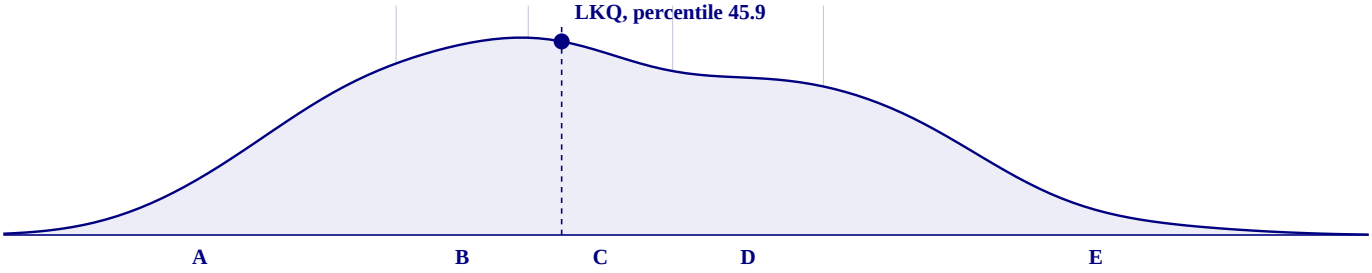
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 55.8						
Gross profitability	34.8%	42.0%		59.0	240	2025-12-31
Return on invested capital	not computable	10.9%				
latest aligned inputs end 2014-12-31; latest annual assets end 2025-12-31						
Accruals ratio	(3.0%)	(4.8%)		72.5	285	2025-12-31
Gross margin stability, five years	0.9 pts	1.2 pts		35.9	218	2025-12-31

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Solvency, sleeve percentile 36.3						
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	1.93				
one or more required annual facts are missing						
Net debt to EBITDA	not computable	1.84x				
latest aligned inputs end 2014-12-31; latest annual assets end 2025-12-31						
Interest coverage	not computable	2.28x				
latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31						
Current ratio	1.67x	1.38x		36.3	293	2025-12-31
Growth and financing, sleeve percentile 51.6						
Revenue growth, three-year compound	2.2%	1.6%		46.2	267	2025-12-31
Free cash flow growth, three-year compound	(6.3%)	5.2%		73.5	148	2025-12-31
Reinvestment rate	(18.2%)	8.4%		74.8	152	2025-12-31
Asset growth, three years	7.9%	3.4%		27.9	270	2025-12-31
Net share issuance, one year	(1.6%)	(0.6%)		35.7	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
113	TJX Companies Inc. (TJX)	43.9	C	
114	US Foods Holding Corp. (USFD)	44.3	C	
115	Sonic Automotive Inc. (SAH)	44.7	C	
116	Herbalife Ltd. (HLF)	45.1	C	
117	Cannae Holdings, Inc. (CNNE)	45.5	C	fortress balance sheet
118	LKQ Corp. (LKQ)	45.9	C	
119	Yum China Holdings, Inc. (YUMC)	46.3	C	
120	First Watch Restaurant Group, Inc. (FWRG)	46.7	C	
121	Honest Company, Inc. (HNST)	47.1	C	
122	Starbucks Corp. (SBUX)	47.5	C	
123	Universal Corp. (UVV)	47.8	C	late filer

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	(14.2%)	0.7%	33
Distance from 52-week high	(50.6%)	(19.7%)	16
EBIT to enterprise value	17.7%	5.3%	97
Free cash flow yield	19.5%	4.1%	94
Book value to price	1.48	0.35	91
Sales to price	3.14	1.63	70
Composite equity issuance, five years	(32.2%)	(16.8%)	22

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Relative strength against the sector, log excess return	(0.13)	0.03	33

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	fail
Current ratio improved	fail
No new shares issued	pass
Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$301.0M
Operating cash flow, four quarters	$825.0M
Months of runway	not finite
Days since last periodic filing	91 (10-Q received Jul 30, 2026)
Median daily dollar volume, 63 sessions	$77.1M

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	$5.3B	2025-12-31	2026-02-19	10-K	26-000012
2	assets	us-gaap:Assets	$15.1B	2025-12-31	2026-02-19	10-K	26-000012
3	operating income	us-gaap:OperatingIncomeLoss	$649.9M	2014-12-31	2017-02-27	10-K	17-000005
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$587.9M	2014-12-31	2017-02-27	10-K	17-000005
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$204.3M	2014-12-31	2017-02-27	10-K	17-000005
6	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$1.8B	2014-12-31	2016-02-25	10-K	16-000076
7	book equity	us-gaap:StockholdersEquity	$2.7B	2014-12-31	2018-02-28	10-K	18-000004
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$114.6M	2014-12-31	2018-02-28	10-K	18-000004
9	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$1.3B	2013-12-31	2015-03-02	10-K	15-000007
10	book equity	us-gaap:StockholdersEquity	$2.4B	2013-12-31	2017-02-27	10-K	17-000005
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$150.5M	2013-12-31	2017-02-27	10-K	17-000005
12	net income	us-gaap:NetIncomeLoss	$608.0M	2025-12-31	2026-02-19	10-K	26-000012
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$1.1B	2025-12-31	2026-02-19	10-K	26-000012
14	assets	us-gaap:Assets	$15.0B	2024-12-31	2026-02-19	10-K	26-000012
15	revenue	us-gaap:Revenues	$13.7B	2025-12-31	2026-02-19	10-K	26-000012
16	gross profit	us-gaap:GrossProfit	$5.4B	2024-12-31	2026-02-19	10-K	26-000012
17	revenue	us-gaap:Revenues	$13.8B	2024-12-31	2026-02-19	10-K	26-000012
18	gross profit	us-gaap:GrossProfit	$5.4B	2023-12-31	2026-02-19	10-K	26-000012
19	revenue	us-gaap:Revenues	$13.3B	2023-12-31	2026-02-19	10-K	26-000012
20	gross profit	us-gaap:GrossProfit	$5.2B	2022-12-31	2025-02-20	10-K	25-000015
21	revenue	us-gaap:Revenues	$12.8B	2022-12-31	2025-02-20	10-K	25-000015
22	gross profit	us-gaap:GrossProfit	$5.3B	2021-12-31	2024-02-22	10-K	24-000009
23	revenue	us-gaap:Revenues	$13.1B	2021-12-31	2024-02-22	10-K	24-000009
24	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$125.4M	2014-12-31	2017-02-27	10-K	17-000005
25	operating income	us-gaap:OperatingIncomeLoss	$1.3B	2023-12-31	2026-02-19	10-K	26-000012
26	interest expense	us-gaap:InterestExpense	-$214.0M	2023-12-31	2024-02-22	10-K	24-000009
27	current assets	us-gaap:AssetsCurrent	$5.2B	2025-12-31	2026-02-19	10-K	26-000012
28	current liabilities	us-gaap:LiabilitiesCurrent	$3.1B	2025-12-31	2026-02-19	10-K	26-000012
29	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$216.0M	2025-12-31	2026-02-19	10-K	26-000012
30	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$1.1B	2024-12-31	2026-02-19	10-K	26-000012

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31	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$311.0M	2024-12-31	2026-02-19	10-K	26-000012
32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$1.4B	2023-12-31	2026-02-19	10-K	26-000012
33	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$358.0M	2023-12-31	2026-02-19	10-K	26-000012
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$1.2B	2022-12-31	2025-02-20	10-K	25-000015
35	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$222.0M	2022-12-31	2025-02-20	10-K	25-000015
36	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$418.0M	2025-12-31	2026-02-19	10-K	26-000012
37	operating income	us-gaap:OperatingIncomeLoss	$993.0M	2025-12-31	2026-02-19	10-K	26-000012
38	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$800.0M	2025-12-31	2026-02-19	10-K	26-000012
39	income tax	us-gaap:IncomeTaxExpenseBenefit	$204.0M	2025-12-31	2026-02-19	10-K	26-000012
40	current assets	us-gaap:AssetsCurrent	$4.9B	2024-12-31	2026-02-19	10-K	26-000012
41	current liabilities	us-gaap:LiabilitiesCurrent	$2.9B	2024-12-31	2026-02-19	10-K	26-000012
42	assets	us-gaap:Assets	$15.1B	2023-12-31	2025-02-20	10-K	25-000015
43	assets	us-gaap:Assets	$12.0B	2022-12-31	2024-02-22	10-K	24-000009
44	shares outstanding	dei:EntityCommonStockSharesOutstanding	255,132,267	2026-02-13	2026-02-19	10-K	26-000012
45	shares outstanding	dei:EntityCommonStockSharesOutstanding	259,154,784	2025-02-14	2025-02-20	10-K	25-000015

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