# Rollins Inc.

**ROL**

NYSE; other; SIC 7340, Services-To Dwellings & Other Buildings; CIK 0000084839

**C**

**middle fifth of 335 graded peers in other**

rank 160 of 335; percentile 47.6; sampling error 2.6 points; lower is stronger

A B C D E

**C, the tortoise**



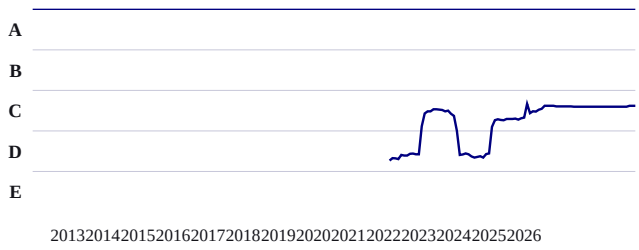
| Scoreboard | |
|---|---|
| **Profitability** | C<br>percentile 54.6 |
| **Solvency** | C<br>percentile 46.6 |
| **Growth and financing** | B/C<br>percentile 40.1 |
| **Reliability** | 0.94 AUC<br>filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025 |
| **Peer failure rate** | 0.52% a year<br>Item 1.03 bankruptcies, same asset band, 2012 to 2025 |
| **Size band** | over $2.67B assets<br>total assets $3.1B |
| **Standard universe** | inside<br>revenue above $1M and assets above $10M |
| **Warnings** | none triggered<br>not computable: distress |
| **Inputs computable** | 9 of 14 |
| **Graded from** | filings received through Feb 12, 2026<br>259 days before the rescan; latest periodic filing 10-Q received Oct 22, 2026 |
| **Last close** | $33.51<br>2026-10-28; market equity $16.0B; 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 12, 2026*

Market for Registrant's Common Equity, Related Stockholder Matters and Issuer Purchases of Equity Securities. Management's Discussion and Analysis of Financial Condition and Results of Operations. Changes in and Disagreements with Accountants on Accounting and Financial Disclosures. Disclosure Regarding Foreign Jurisdictions that Prevent Inspections Security Ownership of Certain Beneficial Owners and Management and Related Stockholder Matters. Certain Relationships and Related Party Transactions, and Director Independence. Rollins, Inc. ("Rollins," "we," "us," "our," or the "Company"), is an international services company headquartered in Atlanta, Georgia.

## 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 54.6** | | | | | | |
| Gross profitability | not computable | 27.0% | | | | |

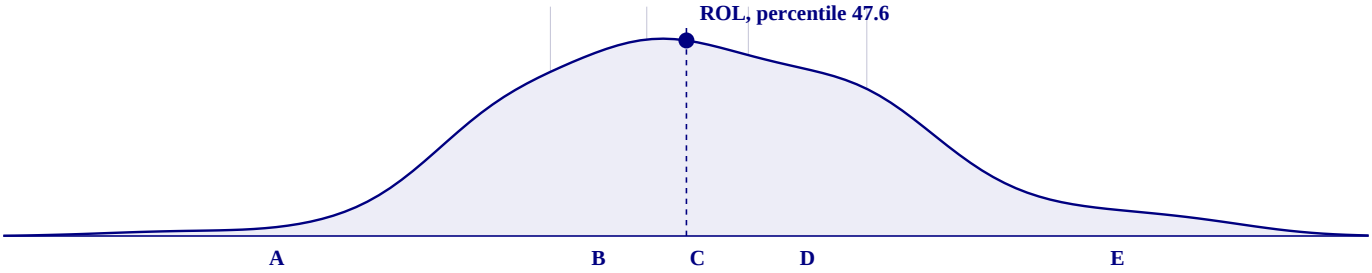
*latest aligned inputs end 2020-12-31; latest annual assets end 2025-12-31*

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| | | | | | | |
|---|---|---|---|---|---|---|
| Return on invested capital | not computable | 10.0% | | | | |
| *prior invested-capital observation is 2192 days earlier* | | | | | | |
| Accruals ratio | (5.1%) | (5.8%) | 54.6 | 503 | 2025-12-31 | |
| Gross margin stability, five years | not computable | 2.2 pts | | | | |
| *five annual gross margins are required; found 3* | | | | | | |
| **Solvency, sleeve percentile 46.6** | | | | | | |
| Twelve-month failure probability | not computable | 0.04% | | | | |
| *latest liabilities, cash plus short-term investments, book equity, and shares are required* | | | | | | |
| Altman Z double-prime | 2.48 | 2.05 | 35.7 | 385 | 2025-12-31 | |
| Net debt to EBITDA | 0.51x | 2.52x | 18.8 | 182 | 2025-12-31 | |
| Interest coverage | not computable | 2.45x | | | | |
| *one or more required annual facts are missing* | | | | | | |
| Current ratio | 0.60x | 1.33x | 85.4 | 507 | 2025-12-31 | |
| **Growth and financing, sleeve percentile 40.1** | | | | | | |
| Revenue growth, three-year compound | 11.7% | 5.1% | 27.1 | 400 | 2025-12-31 | |
| Free cash flow growth, three-year compound | 14.3% | 8.8% | 41.4 | 221 | 2025-12-31 | |
| Reinvestment rate | (21.4%) | 11.6% | 66.8 | 191 | 2025-12-31 | |
| Asset growth, three years | 14.0% | 4.2% | 22.5 | 437 | 2025-12-31 | |
| Net share issuance, one year | (0.6%) | (0.5%) | 42.6 | 353 | 2026-01-31 | |

## 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 |
|---|---|---|---|---|
| 155 | Fortune Brands Innovations, Inc. (FBIN) | 46.1 | C | |
| 156 | Ebay Inc. (EBAY) | 46.4 | C | |
| 157 | Uber Technologies, Inc. (UBER) | 46.7 | C | |
| 158 | Granite Construction Inc. (GVA) | 47.0 | C | |
| 159 | ICF International, Inc. (ICFI) | 47.3 | C | |
| 160 | Rollins Inc. (ROL) | 47.6 | C | |
| 161 | All In FutureTech Alliance, Inc. (AIFA) | 47.9 | C | late filer |
| 162 | Orion Group Holdings Inc. (ORN) | 48.2 | C | fortress balance sheet |
| 163 | RB Global Inc. (RBA) | 48.5 | C | |
| 164 | Jacobs Solutions Inc. (J) | 48.8 | C | |
| 165 | XPO, Inc. (XPO) | 49.1 | C | |

## 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 | (37.7%) | 2.0% | 16 |
| Distance from 52-week high | (48.9%) | (26.4%) | 22 |
| EBIT to enterprise value | 4.4% | 4.3% | 51 |
| Free cash flow yield | 4.1% | 4.2% | 49 |

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| | | | |
|---|---|---|---|
| Book value to price | 0.09 | 0.34 | 15 |
| Sales to price | 0.23 | 0.71 | 20 |
| Composite equity issuance, five years | (10.3%) | (8.9%) | 48 |
| Relative strength against the sector, log excess return | (0.62) | (0.13) | 16 |

## 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 | pass |
| 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 | pass |
| **Cash, filings, liquidity** | |
| Cash and equivalents | $129.1M |
| Operating cash flow, four quarters | $697.5M |
| Months of runway | not finite |
| Days since last periodic filing | 7 (10-Q received Oct 22, 2026) |
| Median daily dollar volume, 63 sessions | $203.8M |

## 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 | revenue | us-gaap:Revenues | $2.2B | 2020-12-31 | 2021-02-26 | 10-K | 21-000076 |
| 2 | cost of revenue | us-gaap:CostOfGoodsAndServicesSold | $1.0B | 2020-12-31 | 2021-02-26 | 10-K | 21-000076 |
| 3 | assets | us-gaap:Assets | $1.8B | 2020-12-31 | 2022-02-25 | 10-K | 22-000011 |
| 4 | operating income | us-gaap:OperatingIncomeLoss | $726.1M | 2025-12-31 | 2026-02-12 | 10-K | 26-000008 |
| 5 | pretax income | us-gaap:IncomeLossFromContinuingOperationsBeforeInc... | $700.9M | 2025-12-31 | 2026-02-12 | 10-K | 26-000008 |
| 6 | income tax | us-gaap:IncomeTaxExpenseBenefit | $174.2M | 2025-12-31 | 2026-02-12 | 10-K | 26-000008 |
| 7 | total debt | us-gaap:LongTermDebt | $486.1M | 2025-12-31 | 2026-02-12 | 10-K | 26-000008 |
| 8 | book equity | us-gaap:StockholdersEquity | $1.4B | 2025-12-31 | 2026-02-12 | 10-K | 26-000008 |
| 9 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $100.0M | 2025-12-31 | 2026-02-12 | 10-K | 26-000008 |
| 10 | total debt | us-gaap:LongTermDebt | $203.0M | 2019-12-31 | 2021-02-26 | 10-K | 21-000076 |
| 11 | book equity | us-gaap:StockholdersEquity | $833.1M | 2019-12-31 | 2023-02-16 | 10-K | 23-000006 |
| 12 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $94.3M | 2019-12-31 | 2021-02-26 | 10-K | 21-000076 |
| 13 | net income | us-gaap:NetIncomeLoss | $526.7M | 2025-12-31 | 2026-02-12 | 10-K | 26-000008 |
| 14 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $678.1M | 2025-12-31 | 2026-02-12 | 10-K | 26-000008 |
| 15 | assets | us-gaap:Assets | $3.1B | 2025-12-31 | 2026-02-12 | 10-K | 26-000008 |
| 16 | assets | us-gaap:Assets | $2.8B | 2024-12-31 | 2026-02-12 | 10-K | 26-000008 |
| 17 | current assets | us-gaap:AssetsCurrent | $472.7M | 2025-12-31 | 2026-02-12 | 10-K | 26-000008 |
| 18 | current liabilities | us-gaap:LiabilitiesCurrent | $785.5M | 2025-12-31 | 2026-02-12 | 10-K | 26-000008 |
| 19 | retained earnings | us-gaap:RetainedEarningsAccumulatedDeficit | $738.9M | 2025-12-31 | 2026-02-12 | 10-K | 26-000008 |
| 20 | liabilities | us-gaap:Liabilities | $1.8B | 2025-12-31 | 2026-02-12 | 10-K | 26-000008 |
| 21 | depreciation amortization | us-gaap:Depreciation | $34.4M | 2025-12-31 | 2026-02-12 | 10-K | 26-000008 |
| 22 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $3.8B | 2025-12-31 | 2026-02-12 | 10-K | 26-000008 |
| 23 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $3.4B | 2024-12-31 | 2026-02-12 | 10-K | 26-000008 |
| 24 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $3.1B | 2023-12-31 | 2026-02-12 | 10-K | 26-000008 |
| 25 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $2.7B | 2022-12-31 | 2025-02-13 | 10-K | 25-000024 |
| 26 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $28.1M | 2025-12-31 | 2026-02-12 | 10-K | 26-000008 |

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| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| 27 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $607.7M | 2024-12-31 | 2026-02-12 | 10-K | 26-000008 |
| 28 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $27.6M | 2024-12-31 | 2026-02-12 | 10-K | 26-000008 |
| 29 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $528.4M | 2023-12-31 | 2026-02-12 | 10-K | 26-000008 |
| 30 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $32.5M | 2023-12-31 | 2026-02-12 | 10-K | 26-000008 |
| 31 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $465.9M | 2022-12-31 | 2025-02-13 | 10-K | 25-000024 |
| 32 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $30.6M | 2022-12-31 | 2025-02-13 | 10-K | 25-000024 |
| 33 | current assets | us-gaap:AssetsCurrent | $442.6M | 2024-12-31 | 2026-02-12 | 10-K | 26-000008 |
| 34 | current liabilities | us-gaap:LiabilitiesCurrent | $645.2M | 2024-12-31 | 2026-02-12 | 10-K | 26-000008 |
| 35 | assets | us-gaap:Assets | $2.6B | 2023-12-31 | 2025-02-13 | 10-K | 25-000024 |
| 36 | assets | us-gaap:Assets | $2.1B | 2022-12-31 | 2024-02-15 | 10-K | 24-000025 |
| 37 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 481,092,221 | 2026-01-31 | 2026-02-12 | 10-K | 26-000008 |
| 38 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 484,224,958 | 2025-01-31 | 2025-02-13 | 10-K | 25-000024 |

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