# GEO Group Inc.

**GEO**

NYSE; other; SIC 1520, General Bldg Contractors - Residential Bldgs; CIK 0000923796

**D**

**fourth fifth of 336 graded peers in other**

rank 237 of 336; percentile 70.4; sampling error 2.6 points; lower is stronger

A B C D E

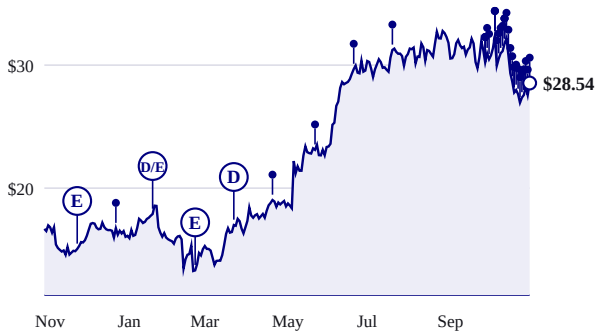
**D, the sloth**



## Scoreboard

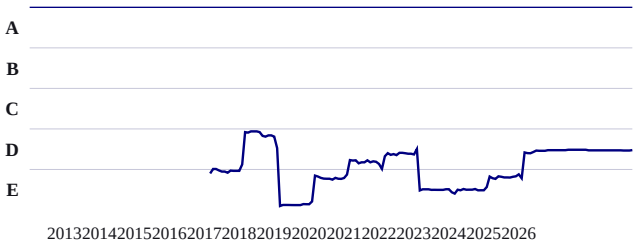
| | |
|---|---|
| **Profitability** | D/E<br>percentile 78.6 |
| **Solvency** | C<br>percentile 50.2 |
| **Growth and financing** | B<br>percentile 36.4 |
| **Reliability** | 0.94 AUC<br>filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025 |
| **Peer failure rate** | 0.52% a year<br>Item 1.03 bankruptcies, same asset band, 2012 to 2025 |
| **Size band** | over $2.67B assets<br>total assets $3.8B |
| **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 25, 2026<br>247 days before the rescan; latest periodic filing 10-Q received Aug 6, 2026 |
| **Last close** | $28.52<br>2026-10-29; market equity $3.8B; 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*

As used in this report, the terms "we," "us," "our," "GEO" and the "Company" refer to The GEO Group, Inc., its consolidated subsidiaries and its unconsolidated affiliates, unless otherwise expressly stated or the context otherwise requires. We specialize in the ownership, leasing and management of secure facilities, processing centers and reentry facilities and the provision of community-based services in the United States, Australia and South Africa. We own, lease and operate a broad range of secure facilities including maximum, medium and minimum-security facilities, processing centers, as well as community-based reentry facilities.

## The fourteen inputs

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

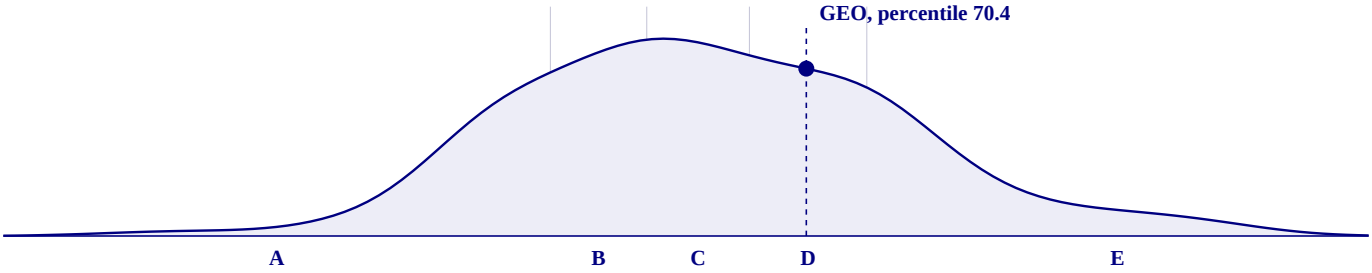
| Input | Value | Peer median | Percentile, 0 to 100 | Pct | Peers | Period end |
|---|---|---|---|---|---|---|
| **Profitability, sleeve percentile 78.6** | | | | | | |
| Gross profitability | not computable | 27.0% | | | | |
| *one or more required annual facts are missing* | | | | | | |

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.

| | | | | | | |
|---|---|---|---|---|---|---|
| Return on invested capital | 6.3% | 10.0% | | 66.0 | 151 | 2025-12-31 |
| Accruals ratio | 4.9% | (5.8%) | | 91.2 | 503 | 2025-12-31 |
| Gross margin stability, five years | not computable | 2.2 pts | | | | |
| *five annual gross margins are required; found 0* | | | | | | |
| **Solvency, sleeve percentile 50.2** | | | | | | |
| 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 | 4.11x | 2.52x | | 71.3 | 182 | 2025-12-31 |
| Interest coverage | 1.60x | 2.45x | | 51.7 | 88 | 2025-12-31 |
| Current ratio | 2.01x | 1.32x | | 27.7 | 507 | 2025-12-31 |
| **Growth and financing, sleeve percentile 36.4** | | | | | | |
| Revenue growth, three-year compound | 3.5% | 5.0% | | 55.1 | 400 | 2025-12-31 |
| Free cash flow growth, three-year compound | not computable | 8.7% | | | | |
| *current FCF must be positive and base FCF must exceed $100,000* | | | | | | |
| Reinvestment rate | 139.4% | 11.6% | | 8.4 | 191 | 2025-12-31 |
| Asset growth, three years | 0.7% | 4.2% | | 64.0 | 437 | 2025-12-31 |
| Net share issuance, one year | (4.3%) | (0.5%) | | 17.9 | 353 | 2026-02-23 |

## Among 336 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 |
|---|---|---|---|---|
| 232 | Kelly Services Inc. (KELYB) | 68.8 | D | |
| 233 | PayPal Holdings, Inc. (PYPL) | 69.3 | D | |
| 234 | Vail Resorts Inc. (MTN) | 69.6 | D | |
| 235 | Payoneer Global Inc. (PAYO) | 69.9 | D | |
| 236 | Hub Group, Inc. (HUBG) | 70.1 | D | late filer |
| 237 | GEO Group Inc. (GEO) | 70.4 | D | |
| 238 | DLH Holdings Corp. (DLHC) | 70.7 | D | |
| 239 | Travel & Leisure Co. (TNL) | 71.0 | D | |
| 240 | CuriosityStream Inc. (CURI) | 71.3 | D | |
| 241 | Monarch Casino & Resort Inc. (MCRI) | 71.6 | D | |
| 242 | Alight, Inc. Delaware (ALIT) | 71.9 | D | |

## What the price implies

*at the 2026-10-29 close; none of these enters the grade*

| Measure | Value | Peer median | Percentile |
|---|---|---|---|
| Twelve-month price change, skipping the latest month | 55.2% | 2.0% | 87 |
| Distance from 52-week high | (12.9%) | (24.2%) | 66 |
| EBIT to enterprise value | 4.8% | 4.3% | 56 |
| Free cash flow yield | (3.3%) | 4.1% | 18 |

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.

| | | | |
|---|---|---|---|
| Book value to price | 0.40 | 0.33 | 59 |
| Sales to price | 0.70 | 0.70 | 50 |
| Composite equity issuance, five years | 8.2% | (8.8%) | 76 |
| Relative strength against the sector, log excess return | 0.29 | (0.13) | 87 |

## 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 | fail |
| Long-term leverage fell | pass |
| Current ratio improved | pass |
| No new shares issued | pass |
| Gross margin improved | fail |
| Asset turnover improved | pass |
| **Cash, filings, liquidity** | |
| Cash and equivalents | $55.0M |
| Operating cash flow, four quarters | $198.7M |
| Months of runway | not finite |
| Days since last periodic filing | 85 (10-Q received Aug 6, 2026) |
| Median daily dollar volume, 63 sessions | $67.2M |

## 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 | $257.5M | 2025-12-31 | 2026-02-25 | 10-K | 26-071747 |
| 2 | pretax income | us-gaap:IncomeLossFromContinuingOperationsBeforeInc... | $335.5M | 2025-12-31 | 2026-02-25 | 10-K | 26-071747 |
| 3 | income tax | us-gaap:IncomeTaxExpenseBenefit | $85.7M | 2025-12-31 | 2026-02-25 | 10-K | 26-071747 |
| 4 | total debt | us-gaap:LongTermDebt | $1.7B | 2025-12-31 | 2026-02-25 | 10-K | 26-071747 |
| 5 | book equity | us-gaap:StockholdersEquity | $1.5B | 2025-12-31 | 2026-02-25 | 10-K | 26-071747 |
| 6 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $69.0M | 2025-12-31 | 2026-02-25 | 10-K | 26-071747 |
| 7 | total debt | us-gaap:LongTermDebt | $1.7B | 2024-12-31 | 2025-02-28 | 10-K | 25-029972 |
| 8 | book equity | us-gaap:StockholdersEquity | $1.3B | 2024-12-31 | 2026-02-25 | 10-K | 26-071747 |
| 9 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $76.9M | 2024-12-31 | 2026-02-25 | 10-K | 26-071747 |
| 10 | net income | us-gaap:NetIncomeLoss | $254.4M | 2025-12-31 | 2026-02-25 | 10-K | 26-071747 |
| 11 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $72.6M | 2025-12-31 | 2026-02-25 | 10-K | 26-071747 |
| 12 | assets | us-gaap:Assets | $3.8B | 2025-12-31 | 2026-02-25 | 10-K | 26-071747 |
| 13 | assets | us-gaap:Assets | $3.6B | 2024-12-31 | 2026-02-25 | 10-K | 26-071747 |
| 14 | depreciation amortization | us-gaap:DepreciationDepletionAndAmortization | $132.0M | 2025-12-31 | 2026-02-25 | 10-K | 26-071747 |
| 15 | interest expense | us-gaap:InterestExpense | $160.5M | 2025-12-31 | 2026-02-25 | 10-K | 26-071747 |
| 16 | current assets | us-gaap:AssetsCurrent | $718.5M | 2025-12-31 | 2026-02-25 | 10-K | 26-071747 |
| 17 | current liabilities | us-gaap:LiabilitiesCurrent | $356.9M | 2025-12-31 | 2026-02-25 | 10-K | 26-071747 |
| 18 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $2.6B | 2025-12-31 | 2026-02-25 | 10-K | 26-071747 |
| 19 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $2.4B | 2024-12-31 | 2026-02-25 | 10-K | 26-071747 |
| 20 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $2.4B | 2023-12-31 | 2026-02-25 | 10-K | 26-071747 |
| 21 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $2.4B | 2022-12-31 | 2025-02-28 | 10-K | 25-029972 |
| 22 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $197.5M | 2025-12-31 | 2026-02-25 | 10-K | 26-071747 |
| 23 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $242.2M | 2024-12-31 | 2026-02-25 | 10-K | 26-071747 |
| 24 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $78.7M | 2024-12-31 | 2026-02-25 | 10-K | 26-071747 |
| 25 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $277.8M | 2023-12-31 | 2026-02-25 | 10-K | 26-071747 |
| 26 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $73.0M | 2023-12-31 | 2026-02-25 | 10-K | 26-071747 |

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.

| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| 27 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $288.0M | 2022-12-31 | 2025-02-28 | 10-K | 25-029972 |
| 28 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $90.0M | 2022-12-31 | 2025-02-28 | 10-K | 25-029972 |
| 29 | current assets | us-gaap:AssetsCurrent | $500.2M | 2024-12-31 | 2026-02-25 | 10-K | 26-071747 |
| 30 | current liabilities | us-gaap:LiabilitiesCurrent | $340.2M | 2024-12-31 | 2026-02-25 | 10-K | 26-071747 |
| 31 | assets | us-gaap:Assets | $3.7B | 2023-12-31 | 2025-02-28 | 10-K | 25-029972 |
| 32 | assets | us-gaap:Assets | $3.8B | 2022-12-31 | 2024-02-29 | 10-K | 24-023181 |
| 33 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 134,361,648 | 2026-02-23 | 2026-02-25 | 10-K | 26-071747 |
| 34 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 140,379,419 | 2025-02-24 | 2025-02-28 | 10-K | 25-029972 |

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.