GXO Logistics, Inc.

GXO

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

E

weakest fifth of 336 graded peers in other

rank 290 of 336; percentile 86.3; sampling error 2.6 points; lower is stronger

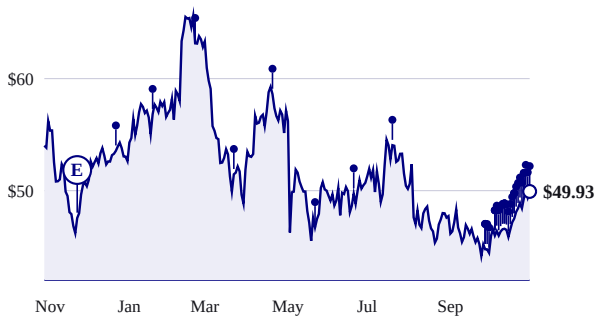
A B C D E

E, the bear



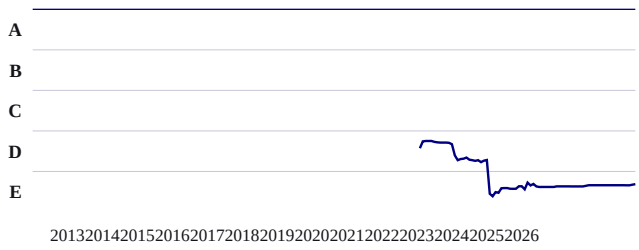
Scoreboard	
Profitability	D percentile 73.8
Solvency	C/D percentile 60.8
Growth and financing	C percentile 48.9
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
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 247 days before the rescan; latest periodic filing 10-Q received Aug 5, 2026
Last close	$49.88 2026-10-29; 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

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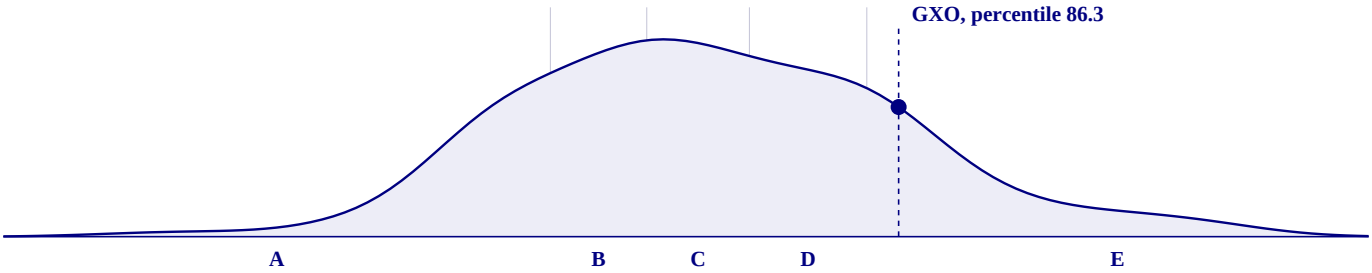
Gross margin stability, five years	not computable	2.2 pts				
five annual gross margins are required; found 0						
Solvency, sleeve percentile 60.8						
Twelve-month failure probability	not computable	0.04%				
liabilities and a nearby cover-page share count are required at 2026-06-30						
Altman 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	1.32x		72.3	507	2025-12-31
Growth and financing, sleeve percentile 48.9						
Revenue growth, three-year compound	13.6%	5.0%		22.8	400	2025-12-31
Free cash flow growth, three-year compound	(18.1%)	8.7%		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 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
285	Target Hospitality Corp. (TH)	84.8	E	late filer, fortress balance sheet
286	CSX Corp. (CSX)	85.1	E	
287	RXO, Inc. (RXO)	85.4	E	
288	Forward AIR Corp. (FWRD)	85.7	E	late filer
289	Advantage Solutions Inc. (ADV)	86.0	E	
290	GXO Logistics, Inc. (GXO)	86.3	E	
291	Xenia Hotels & Resorts, Inc. (XHR)	86.6	E	
292	Monro, Inc. (MNRO)	86.9	E	
293	Enbridge Inc. (ENB)	87.2	E	
294	Comscore, Inc. (SCOR)	87.5	E	dilution
295	Trinet Group, Inc. (TNET)	87.8	E	

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	(9.8%)	2.0%	39
Distance from 52-week high	(23.9%)	(24.2%)	51
EBIT to enterprise value	3.3%	4.3%	33
Free cash flow yield	1.9%	4.1%	32
Book value to price	0.52	0.33	70
Sales to price	2.30	0.70	83

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Composite equity issuance, five years	not computable	(8.8%)	
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	86 (10-Q received Aug 5, 2026)
Median daily dollar volume, 63 sessions	$54.3M

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

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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

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