Hub Group, Inc.

HUBG

Nasdaq; other; SIC 4731, Arrangement of Transportation of Freight & Cargo; CIK 0000940942

D

fourth fifth of 336 graded peers in other

rank 236 of 336; percentile 70.1; sampling error 2.6 points; lower is stronger

A B C D E

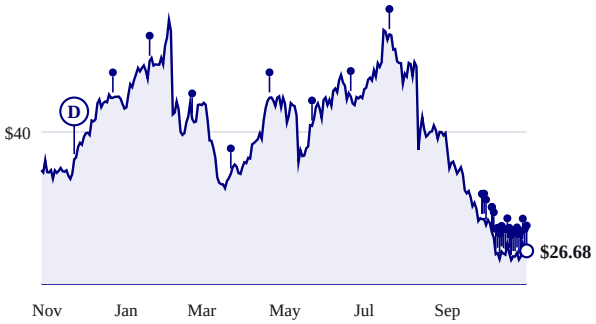
D, the sloth



Scoreboard

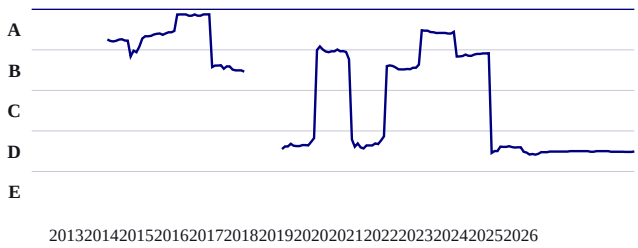
Profitability	D	percentile 68.2
Solvency	B	percentile 32.4
Growth and financing	D	percentile 65.0
Reliability	0.94 AUC	filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year	Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets	total assets $2.9B
Standard universe	inside	revenue above $1M and assets above $10M
Warnings	late filer	not computable: dilution, distress
Inputs computable	8 of 14	
Graded from	filings received through Feb 25, 2025	612 days before the rescan; latest periodic filing 10-Q received Nov 5, 2025
Last close	$26.68	2026-10-29; market equity $0; 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, 2025

Hub Group, Inc. (the "Company", "Hub", "we", "us" or "our") is a leading supply chain solutions provider that offers comprehensive transportation and logistics management services focused on reliability, visibility and value for our customers. Our mission is to continuously elevate each customer's business to drive long term success. Our vision is to build the industry's premier supply chain solution. Our service offerings include a full range of freight transportation and logistics services, some of which are provided using assets we own and operate, and some of which are provided by third parties with whom we contract.

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 68.2						
Gross profitability	not computable	27.0%				
latest aligned inputs end 2022-12-31; latest annual assets end 2024-12-31						
Return on invested capital	6.1%	10.0%		66.7	151	2024-12-31

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Accruals ratio	(3.1%)	(5.8%)	69.7	503	2024-12-31
Gross margin stability, five years	not computable	2.2 pts			
latest aligned inputs end 2022-12-31; latest annual assets end 2024-12-31					
Solvency, sleeve percentile 32.4					
Twelve-month failure probability	not computable	0.04%			
liabilities and a nearby cover-page share count are required at 2025-09-30					
Altman Z double-prime	not computable	2.05			
one or more required annual facts are missing					
Net debt to EBITDA	0.50x	2.52x	18.2	182	2024-12-31
Interest coverage	not computable	2.45x			
latest aligned inputs end 2023-12-31; latest annual assets end 2024-12-31					
Current ratio	1.33x	1.32x	46.6	507	2024-12-31
Growth and financing, sleeve percentile 65.0					
Revenue growth, three-year compound	(2.3%)	5.0%	74.7	400	2024-12-31
Free cash flow growth, three-year compound	6.2%	8.7%	53.2	221	2024-12-31
Reinvestment rate	(130.7%)	11.6%	90.0	191	2024-12-31
Asset growth, three years	5.6%	4.2%	42.0	437	2024-12-31
Net share issuance, one year	not computable	(0.5%)			
two annual share counts are required; found 0					

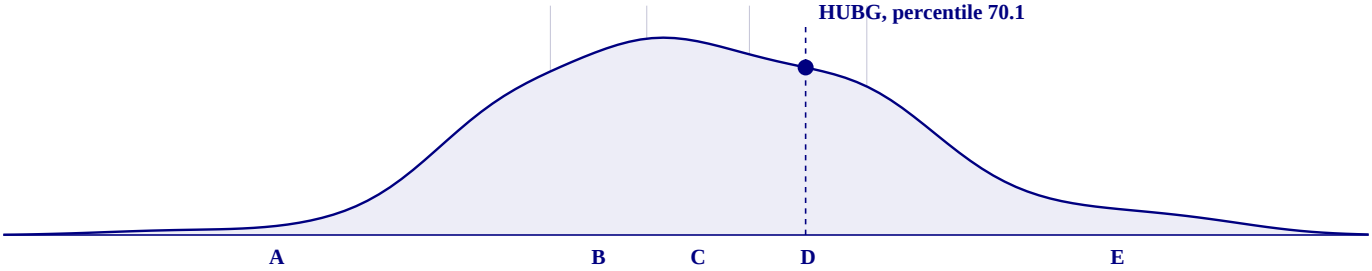
Warnings

1 of 7 checks triggered; none of them enters the letter

Check	Measured
Late filer	found 3 NT 10-K/Q filings in the last eight quarters

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
231	Kelly Services Inc. (KELYA)	68.8	D	
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	

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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	16.4%	2.0%	63
Distance from 52-week high	(49.2%)	(24.2%)	20
EBIT to enterprise value	not computable	4.3%	
Free cash flow yield	not computable	4.1%	
Book value to price	not computable	0.33	
Sales to price	not computable	0.70	
Composite equity issuance, five years	not computable	(8.8%)	
Relative strength against the sector, log excess return	0.01	(0.13)	63

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score None of 9, period end 2024-12-31	
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	fail
Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$119.7M
Operating cash flow, four quarters	$160.2M
Months of runway	not finite
Days since last periodic filing	359 (10-Q received Nov 5, 2025)
Median daily dollar volume, 63 sessions	$37.9M

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	$889.5M	2022-12-31	2023-02-24	10-K	23-004358
2	assets	us-gaap:Assets	$2.8B	2022-12-31	2024-02-27	10-K	24-021432
3	operating income	us-gaap:OperatingIncomeLoss	$140.3M	2024-12-31	2025-02-25	10-K	25-026866
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$132.5M	2024-12-31	2025-02-25	10-K	25-026866
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$28.5M	2024-12-31	2025-02-25	10-K	25-026866
6	total debt	us-gaap:LongTermDebt	$264.4M	2024-12-31	2025-02-25	10-K	25-026866
7	book equity	us-gaap:StockholdersEquity	$1.6B	2024-12-31	2025-02-25	10-K	25-026866
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$98.2M	2024-12-31	2025-02-25	10-K	25-026866
9	total debt	us-gaap:LongTermDebt	$350.7M	2023-12-31	2025-02-25	10-K	25-026866
10	book equity	us-gaap:StockholdersEquity	$1.6B	2023-12-31	2025-02-25	10-K	25-026866
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$187.3M	2023-12-31	2025-02-25	10-K	25-026866
12	net income	us-gaap:NetIncomeLoss	$104.0M	2024-12-31	2025-02-25	10-K	25-026866
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$194.4M	2024-12-31	2025-02-25	10-K	25-026866
14	assets	us-gaap:Assets	$2.9B	2024-12-31	2025-02-25	10-K	25-026866
15	assets	us-gaap:Assets	$2.9B	2023-12-31	2025-02-25	10-K	25-026866
16	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$5.3B	2022-12-31	2025-02-25	10-K	25-026866
17	gross profit	us-gaap:GrossProfit	$599.6M	2021-12-31	2023-02-24	10-K	23-004358
18	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.2B	2021-12-31	2024-02-27	10-K	24-021432

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19	gross profit	us-gaap:GrossProfit	$425.4M	2020-12-31	2023-02-24	10-K	23-004358
20	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$3.5B	2020-12-31	2023-02-24	10-K	23-004358
21	gross profit	us-gaap:GrossProfit	$521.1M	2019-12-31	2022-02-25	10-K	22-002100
22	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$3.7B	2019-12-31	2022-02-25	10-K	22-002100
23	gross profit	us-gaap:GrossProfit	$445.6M	2018-12-31	2021-02-26	10-K	21-009409
24	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$3.7B	2018-12-31	2021-02-26	10-K	21-009409
25	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$192.6M	2024-12-31	2025-02-25	10-K	25-026866
26	operating income	us-gaap:OperatingIncomeLoss	$212.2M	2023-12-31	2025-02-25	10-K	25-026866
27	interest expense	us-gaap:InterestExpense	$13.4M	2023-12-31	2024-02-27	10-K	24-021432
28	current assets	us-gaap:AssetsCurrent	$768.3M	2024-12-31	2025-02-25	10-K	25-026866
29	current liabilities	us-gaap:LiabilitiesCurrent	$579.5M	2024-12-31	2025-02-25	10-K	25-026866
30	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$3.9B	2024-12-31	2025-02-25	10-K	25-026866
31	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.2B	2023-12-31	2025-02-25	10-K	25-026866
32	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$50.8M	2024-12-31	2025-02-25	10-K	25-026866
33	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$422.2M	2023-12-31	2025-02-25	10-K	25-026866
34	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$140.1M	2023-12-31	2025-02-25	10-K	25-026866
35	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$458.2M	2022-12-31	2025-02-25	10-K	25-026866
36	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$219.1M	2022-12-31	2025-02-25	10-K	25-026866
37	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$252.8M	2021-12-31	2024-02-27	10-K	24-021432
38	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$133.0M	2021-12-31	2024-02-27	10-K	24-021432
39	current assets	us-gaap:AssetsCurrent	$849.2M	2023-12-31	2025-02-25	10-K	25-026866
40	current liabilities	us-gaap:LiabilitiesCurrent	$658.2M	2023-12-31	2025-02-25	10-K	25-026866
41	assets	us-gaap:Assets	$2.4B	2021-12-31	2023-02-24	10-K	23-004358

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