Home Depot, Inc.

HD

NYSE; shops; SIC 5211, Retail-Lumber & Other Building Materials Dealers; CIK 0000354950

B

second fifth of 256 graded peers in shops

rank 83 of 256; percentile 32.2; sampling error 2.9 points; lower is stronger

A B C D E

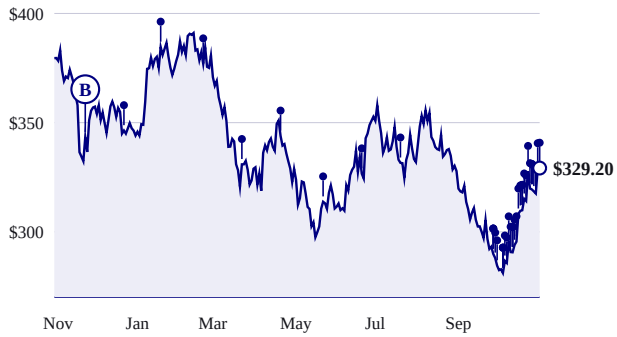
B, the elk



Scoreboard

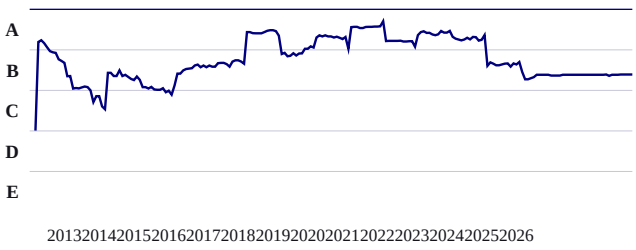
Profitability	B percentile 33.0
Solvency	C percentile 46.0
Growth and financing	C percentile 49.9
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $105.1B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress
Inputs computable	12 of 14
Graded from	filings received through Mar 18, 2026 227 days before the rescan; latest periodic filing 10-Q received Aug 25, 2026
Last close	$329.24 2026-10-30; market equity $328.5B; 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 Mar 18, 2026

The Home Depot, Inc. is the world's largest home improvement retailer based on net sales for fiscal 2025. We offer our customers a wide assortment of home improvement products, building materials, lawn and garden products, décor products, and facilities MRO products, in stores and online. We also provide a number of services, including home improvement installation services, and tool and equipment rental. As of the end of fiscal 2025, we operated 2,359 stores located throughout the U.S. (including the Commonwealth of Puerto Rico and the territories of the U.S. Virgin Islands and Guam), Canada, and Mexico.

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 33.0						
Gross profitability	52.2%	42.0%		33.1	240	2026-02-01
Return on invested capital	28.6%	10.9%		19.3	84	2026-02-01
Accruals ratio	(2.2%)	(4.8%)		78.9	285	2026-02-01

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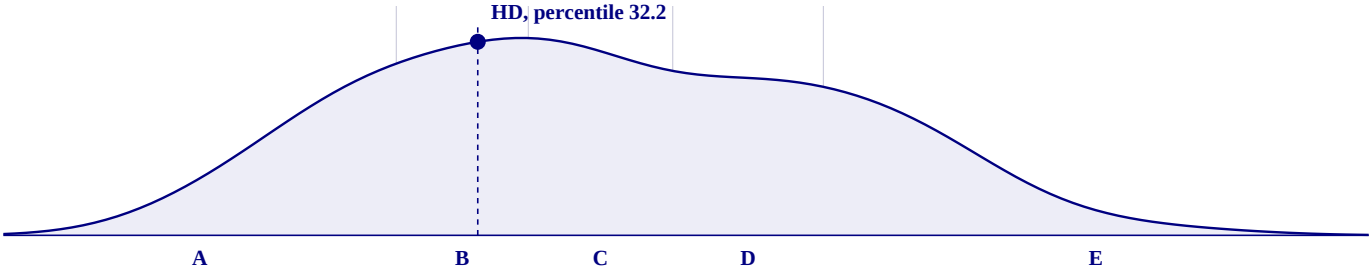
Gross margin stability, five years	0.1 pts	1.2 pts	0.9	218	2026-02-01
Solvency, sleeve percentile 46.0					
Twelve-month failure probability	not computable	0.04%			
latest liabilities, cash plus short-term investments, book equity, and shares are required					
Altman Z double-prime	4.54	1.93	19.1	205	2026-02-01
Net debt to EBITDA	1.84x	1.84x	50.5	100	2026-02-01
Interest coverage	not computable	2.28x			
latest aligned inputs end 2024-01-28; latest annual assets end 2026-02-01					
Current ratio	1.06x	1.38x	68.5	293	2026-02-01
Growth and financing, sleeve percentile 49.9					
Revenue growth, three-year compound	1.5%	1.6%	49.2	267	2026-02-01
Free cash flow growth, three-year compound	3.2%	5.2%	56.5	148	2026-02-01
Reinvestment rate	(5.6%)	8.4%	68.9	152	2026-02-01
Asset growth, three years	11.2%	3.4%	14.1	270	2026-02-01
Net share issuance, one year	0.2%	(0.6%)	60.9	208	2026-03-04

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
78	GAP Inc. (GAP)	30.2	B	fortress balance sheet
79	Williams Sonoma Inc. (WSM)	30.6	B	fortress balance sheet
80	Chefs' Warehouse, Inc. (CHEF)	31.0	B	
81	Natural Grocers by Vitamin Cottage, Inc. (NGVC)	31.4	B	
82	Coupang, Inc. (CPNG)	31.8	B	fortress balance sheet
83	Home Depot, Inc. (HD)	32.2	B	
84	Biglari Holdings Inc. (BH)	32.7	B	
85	Biglari Holdings Inc. (BH-A)	32.7	B	
86	Burlington Stores, Inc. (BURL)	33.3	B	
87	Pool Corp. (POOL)	33.7	B	
88	Weyco Group Inc. (WEYS)	34.1	B	

What the price implies

at the 2026-10-30 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(18.0%)	0.7%	31
Distance from 52-week high	(15.8%)	(20.3%)	56
EBIT to enterprise value	5.6%	5.2%	54
Free cash flow yield	3.9%	3.9%	47
Book value to price	0.05	0.35	17
Sales to price	0.50	1.59	16
Composite equity issuance, five years	(21.2%)	(16.8%)	35
Relative strength against the sector, log excess return	(0.18)	0.03	31

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Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 4 of 9, period end 2026-02-01	
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	fail
No new shares issued	fail
Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$2.1B
Operating cash flow, four quarters	$18.8B
Months of runway	not finite
Days since last periodic filing	67 (10-Q received Aug 25, 2026)
Median daily dollar volume, 63 sessions	$1.3B

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	$54.9B	2026-02-01	2026-03-18	10-K	26-019436
2	assets	us-gaap:Assets	$105.1B	2026-02-01	2026-03-18	10-K	26-019436
3	operating income	us-gaap:OperatingIncomeLoss	$20.9B	2026-02-01	2026-03-18	10-K	26-019436
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$18.6B	2026-02-01	2026-03-18	10-K	26-019436
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$4.4B	2026-02-01	2026-03-18	10-K	26-019436
6	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$46.3B	2026-02-01	2026-03-18	10-K	26-019436
7	book equity	us-gaap:StockholdersEquity	$12.8B	2026-02-01	2026-03-18	10-K	26-019436
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$1.4B	2026-02-01	2026-03-18	10-K	26-019436
9	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$48.5B	2025-02-02	2026-03-18	10-K	26-019436
10	book equity	us-gaap:StockholdersEquity	$6.6B	2025-02-02	2026-03-18	10-K	26-019436
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$1.7B	2025-02-02	2026-03-18	10-K	26-019436
12	net income	us-gaap:NetIncomeLoss	$14.2B	2026-02-01	2026-03-18	10-K	26-019436
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$16.3B	2026-02-01	2026-03-18	10-K	26-019436
14	assets	us-gaap:Assets	$96.1B	2025-02-02	2026-03-18	10-K	26-019436
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$164.7B	2026-02-01	2026-03-18	10-K	26-019436
16	gross profit	us-gaap:GrossProfit	$53.3B	2025-02-02	2026-03-18	10-K	26-019436
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$159.5B	2025-02-02	2026-03-18	10-K	26-019436
18	gross profit	us-gaap:GrossProfit	$51.0B	2024-01-28	2026-03-18	10-K	26-019436
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$152.7B	2024-01-28	2026-03-18	10-K	26-019436
20	gross profit	us-gaap:GrossProfit	$52.8B	2023-01-29	2025-03-21	10-K	25-000085
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$157.4B	2023-01-29	2025-03-21	10-K	25-000085
22	gross profit	us-gaap:GrossProfit	$50.8B	2022-01-30	2024-03-13	10-K	24-000062
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$151.2B	2022-01-30	2024-03-13	10-K	24-000062
24	current assets	us-gaap:AssetsCurrent	$34.4B	2026-02-01	2026-03-18	10-K	26-019436
25	current liabilities	us-gaap:LiabilitiesCurrent	$32.4B	2026-02-01	2026-03-18	10-K	26-019436
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$94.5B	2026-02-01	2026-03-18	10-K	26-019436
27	liabilities	us-gaap:Liabilities	$92.3B	2026-02-01	2026-03-18	10-K	26-019436
28	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$3.5B	2026-02-01	2026-03-18	10-K	26-019436
29	operating income	us-gaap:OperatingIncomeLoss	$21.7B	2024-01-28	2026-03-18	10-K	26-019436
30	interest expense	us-gaap:InterestExpense	$1.9B	2024-01-28	2024-03-13	10-K	24-000062
31	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$3.7B	2026-02-01	2026-03-18	10-K	26-019436

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32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$19.8B	2025-02-02	2026-03-18	10-K	26-019436
33	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$3.5B	2025-02-02	2026-03-18	10-K	26-019436
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$21.2B	2024-01-28	2026-03-18	10-K	26-019436
35	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$3.2B	2024-01-28	2026-03-18	10-K	26-019436
36	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$14.6B	2023-01-29	2025-03-21	10-K	25-000085
37	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$3.1B	2023-01-29	2025-03-21	10-K	25-000085
38	current assets	us-gaap:AssetsCurrent	$31.7B	2025-02-02	2026-03-18	10-K	26-019436
39	current liabilities	us-gaap:LiabilitiesCurrent	$28.7B	2025-02-02	2026-03-18	10-K	26-019436
40	assets	us-gaap:Assets	$76.5B	2024-01-28	2025-03-21	10-K	25-000085
41	assets	us-gaap:Assets	$76.4B	2023-01-29	2024-03-13	10-K	24-000062
42	shares outstanding	dei:EntityCommonStockSharesOutstanding	996,011,466	2026-03-04	2026-03-18	10-K	26-019436
43	shares outstanding	dei:EntityCommonStockSharesOutstanding	994,032,168	2025-03-05	2025-03-21	10-K	25-000085

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