# Oil-Dri Corp. of America

**ODC**

NYSE; consumer durables; SIC 3990, Miscellaneous Manufacturing Industries; CIK 0000074046

**A**

**strongest fifth of 458 graded peers in the pooled consumer gr...**

rank 27 of 458; percentile 5.9; sampling error 2.3 points; lower is stronger

A B C D E

**A, the bull**



## Scoreboard

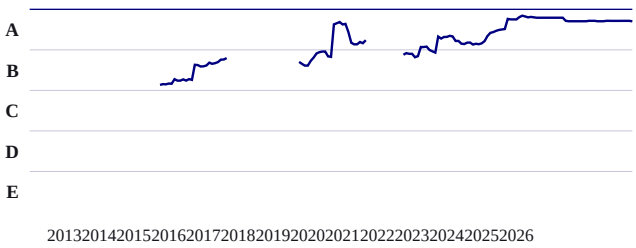
| | |
|---|---|
| **Profitability** | C/D<br>percentile 62.2 |
| **Solvency** | A<br>percentile 11.2 |
| **Growth and financing** | B<br>percentile 22.6 |
| **Reliability** | 0.87 AUC<br>filers with $120M to $591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025 |
| **Peer failure rate** | 1.03% a year<br>Item 1.03 bankruptcies, same asset band, 2012 to 2025 |
| **Size band** | $120M to $591M assets<br>total assets $428.8M |
| **Standard universe** | inside<br>revenue above $1M and assets above $10M |
| **Warnings** | none triggered<br>not computable: dilution, distress, fortress balance sheet |
| **Inputs computable** | 9 of 14 |
| **Graded from** | filings received through Oct 8, 2026<br>23 days before the rescan; latest periodic filing 10-K received Oct 8, 2026 |
| **Last close** | $71.44<br>2026-10-30; 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 Oct 9, 2025*

Except as otherwise indicated herein or as the context otherwise requires, references to "Oil-Dri," the "Company," "we," "us" or "our" refer to Oil-Dri Corporation of America and its subsidiaries. Oil-Dri is a leader in developing, manufacturing and/or marketing sorbent products. Our sorbent products are principally produced from hydrated aluminosilicate minerals, primarily consisting of calcium bentonite, attapulgite and diatomaceous shale, which we refer to collectively as our "clay," our "minerals," or "Fuller's Earth." We surface mine our clay on leased or owned land near our manufacturing facilities in Mississippi, Georgia, Illinois and California.

## The fourteen inputs

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

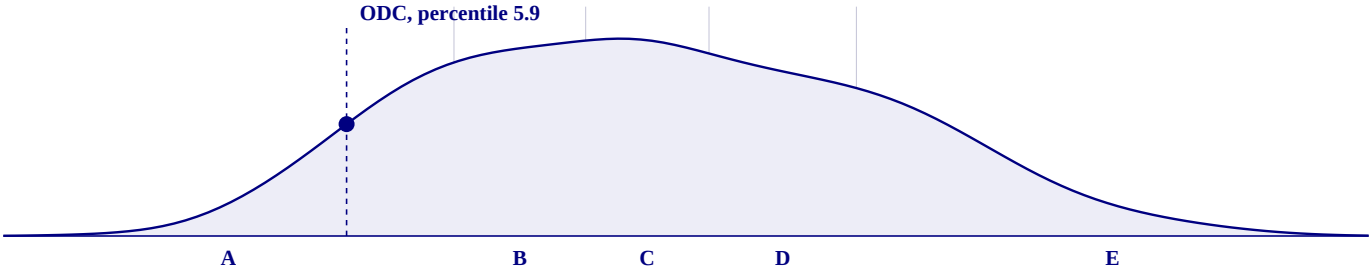
| Input | Value | Peer median | Percentile, 0 to 100 | Pct | Peers | Period end |
|---|---|---|---|---|---|---|
| **Profitability, sleeve percentile 62.2** | | | | | | |
| Gross profitability | 32.1% | 34.4% | | 51.4 | 472 | 2026-07-31 |
| Return on invested capital | not computable | 8.9% | | | | |

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.

| | | | | | |
|---|---|---|---|---|---|
| *one or more required annual facts are missing* | | | | | |
| Accruals ratio | (5.6%) | (5.1%) | 48.5 | 519 | 2026-07-31 |
| Gross margin stability, five years | 4.2 pts | 1.7 pts | 86.7 | 406 | 2026-07-31 |
| **Solvency, sleeve percentile 11.2** | | | | | |
| Twelve-month failure probability | not computable | 0.04% | | | |
| *liabilities and a nearby cover-page share count are required at 2026-07-31* | | | | | |
| Altman Z double-prime | 8.06 | 2.13 | 6.6 | 396 | 2026-07-31 |
| Net debt to EBITDA | not computable | 2.08x | | | |
| *one or more required annual facts are missing* | | | | | |
| Interest coverage | not computable | 2.64x | | | |
| *one or more required annual facts are missing* | | | | | |
| Current ratio | 3.07x | 1.56x | 15.7 | 535 | 2026-07-31 |
| **Growth and financing, sleeve percentile 22.6** | | | | | |
| Revenue growth, three-year compound | 6.1% | 1.4% | 25.5 | 480 | 2026-07-31 |
| Free cash flow growth, three-year compound | 21.8% | 7.6% | 30.8 | 251 | 2026-07-31 |
| Reinvestment rate | 80.0% | 13.6% | 23.0 | 266 | 2026-07-31 |
| Asset growth, three years | 14.4% | 1.7% | 11.0 | 485 | 2026-07-31 |
| Net share issuance, one year | not computable | (0.3%) | | | |
| *two annual share counts are required; found 0* | | | | | |

## Among 458 peers

*consumer durables; 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 |
|---|---|---|---|---|
| 22 | Mama's Creations, Inc. (MAMA) | 4.9 | A | fortress balance sheet |
| 23 | Costco Wholesale Corp. (COST) | 5.1 | A | fortress balance sheet |
| 24 | Tractor Supply Co. (TSCO) | 5.5 | A | fortress balance sheet |
| 25 | Ralph Lauren Corp. (RL) | 5.7 | A | fortress balance sheet |
| 26 | Chipotle Mexican Grill Inc. (CMG) | 5.9 | A | fortress balance sheet |
| 27 | Oil-Dri Corp. of America (ODC) | 5.9 | A | |
| 28 | W.W. Grainger, Inc. (GWW) | 6.3 | A | |
| 29 | Columbia Sportswear Co. (COLM) | 6.5 | A | |
| 30 | Winmark Corp. (WINA) | 6.7 | A | |
| 31 | Applied Industrial Technologies Inc. (AIT) | 7.1 | A | |
| 32 | Monster Beverage Corp. (MNST) | 7.3 | A | fortress balance sheet |

## 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 | 49.1% | (0.1%) | 87 |
| Distance from 52-week high | (32.9%) | (22.8%) | 34 |
| EBIT to enterprise value | not computable | 4.9% | |
| Free cash flow yield | not computable | 4.3% | |

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| | | | |
|---|---|---|---|
| Book value to price | not computable | 0.44 | |
| Sales to price | not computable | 1.44 | |
| Composite equity issuance, five years | not computable | (16.4%) | |
| Relative strength against the sector, log excess return | 0.42 | (0.01) | 89 |

## Diagnostics

*shown on every report; none enters the grade*

| Measure | Value |
|---|---|
| **Piotroski F-score None of 9, period end 2026-07-31** | |
| 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 | fail |
| Current ratio improved | pass |
| No new shares issued | fail |
| Gross margin improved | fail |
| Asset turnover improved | fail |
| **Cash, filings, liquidity** | |
| Cash and equivalents | $73.7M |
| Operating cash flow, four quarters | $80.1M |
| Months of runway | not finite |
| Days since last periodic filing | 23 (10-K received Oct 8, 2026) |
| Median daily dollar volume, 63 sessions | $10.3M |

## 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 | gross profit | us-gaap:GrossProfit | $137.5M | 2026-07-31 | 2026-10-08 | 10-K | 26-065453 |
| 2 | assets | us-gaap:Assets | $428.8M | 2026-07-31 | 2026-10-08 | 10-K | 26-065453 |
| 3 | net income | us-gaap:NetIncomeLoss | $57.0M | 2026-07-31 | 2026-10-08 | 10-K | 26-065453 |
| 4 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $80.1M | 2026-07-31 | 2026-10-08 | 10-K | 26-065453 |
| 5 | assets | us-gaap:Assets | $392.2M | 2025-07-31 | 2026-10-08 | 10-K | 26-065453 |
| 6 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $493.8M | 2026-07-31 | 2026-10-08 | 10-K | 26-065453 |
| 7 | gross profit | us-gaap:GrossProfit | $143.1M | 2025-07-31 | 2026-10-08 | 10-K | 26-065453 |
| 8 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $485.6M | 2025-07-31 | 2026-10-08 | 10-K | 26-065453 |
| 9 | gross profit | us-gaap:GrossProfit | $125.1M | 2024-07-31 | 2026-10-08 | 10-K | 26-065453 |
| 10 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $437.6M | 2024-07-31 | 2026-10-08 | 10-K | 26-065453 |
| 11 | gross profit | us-gaap:GrossProfit | $103.2M | 2023-07-31 | 2025-10-09 | 10-K | 25-044686 |
| 12 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $413.0M | 2023-07-31 | 2025-10-09 | 10-K | 25-044686 |
| 13 | gross profit | us-gaap:GrossProfit | $62.5M | 2022-07-31 | 2023-10-12 | 10-K | 23-000058 |
| 14 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $348.6M | 2022-07-31 | 2023-10-12 | 10-K | 23-000058 |
| 15 | current assets | us-gaap:AssetsCurrent | $208.6M | 2026-07-31 | 2026-10-08 | 10-K | 26-065453 |
| 16 | current liabilities | us-gaap:LiabilitiesCurrent | $68.0M | 2026-07-31 | 2026-10-08 | 10-K | 26-065453 |
| 17 | retained earnings | us-gaap:RetainedEarningsAccumulatedDeficit | $323.5M | 2026-07-31 | 2026-10-08 | 10-K | 26-065453 |
| 18 | operating income | us-gaap:OperatingIncomeLoss | $68.0M | 2026-07-31 | 2026-10-08 | 10-K | 26-065453 |
| 19 | book equity | us-gaap:StockholdersEquityIncludingPortionAttributableT... | $297.7M | 2026-07-31 | 2026-10-08 | 10-K | 26-065453 |
| 20 | liabilities | us-gaap:Liabilities | $131.1M | 2026-07-31 | 2026-10-08 | 10-K | 26-065453 |
| 21 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $34.2M | 2026-07-31 | 2026-10-08 | 10-K | 26-065453 |
| 22 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $80.2M | 2025-07-31 | 2026-10-08 | 10-K | 26-065453 |
| 23 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $32.6M | 2025-07-31 | 2026-10-08 | 10-K | 26-065453 |
| 24 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $60.3M | 2024-07-31 | 2026-10-08 | 10-K | 26-065453 |
| 25 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $32.0M | 2024-07-31 | 2026-10-08 | 10-K | 26-065453 |
| 26 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $49.8M | 2023-07-31 | 2025-10-09 | 10-K | 25-044686 |

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| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| 27 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $24.4M | 2023-07-31 | 2025-10-09 | 10-K | 25-044686 |
| 28 | depreciation amortization | us-gaap:Depreciation | $22.0M | 2026-07-31 | 2026-10-08 | 10-K | 26-065453 |
| 29 | pretax income | us-gaap:IncomeLossFromContinuingOperationsBeforeInc... | $69.5M | 2026-07-31 | 2026-10-08 | 10-K | 26-065453 |
| 30 | income tax | us-gaap:IncomeTaxExpenseBenefit | $12.5M | 2026-07-31 | 2026-10-08 | 10-K | 26-065453 |
| 31 | current assets | us-gaap:AssetsCurrent | $177.4M | 2025-07-31 | 2026-10-08 | 10-K | 26-065453 |
| 32 | current liabilities | us-gaap:LiabilitiesCurrent | $69.2M | 2025-07-31 | 2026-10-08 | 10-K | 26-065453 |
| 33 | assets | us-gaap:Assets | $354.6M | 2024-07-31 | 2025-10-09 | 10-K | 25-044686 |
| 34 | assets | us-gaap:Assets | $286.2M | 2023-07-31 | 2024-10-10 | 10-K | 24-000061 |

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