Pool Corp.

POOL

Nasdaq; shops; SIC 5090, Wholesale-Misc Durable Goods; CIK 0000945841

B

second fifth of 256 graded peers in shops

rank 87 of 256; percentile 33.7; sampling error 2.9 points; lower is stronger

A B C D E

B, the elk



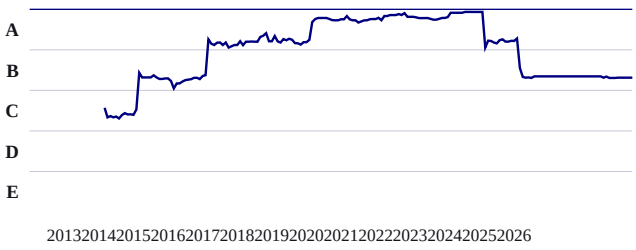
Scoreboard	
Profitability	C percentile 53.5
Solvency	B percentile 23.6
Growth and financing	C percentile 54.5
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $3.6B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: short runway, distress
Inputs computable	10 of 14
Graded from	filings received through Feb 26, 2026 248 days before the rescan; latest periodic filing 10-Q received Oct 28, 2026
Last close	$205.95 2026-10-30; market equity $7.4B; 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 26, 2026

Pool Corporation (the Company, which may also be referred to as we, us or our), a member of the S&P 500 Index, is the world's largest wholesale distributor of swimming pool supplies, equipment and related leisure products and is one of the leading distributors of irrigation and landscape maintenance products in the United States. As of December 31, 2025, we operated 456 sales centers strategically located in North America, Europe and Australia, from which we sell swimming pool supplies, equipment and related leisure products, irrigation and landscape maintenance products and hardscapes, tile and stone products.

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 53.5						
Gross profitability	43.4%	42.0%		47.3	240	2025-12-31
Return on invested capital	not computable	10.9%				

latest aligned inputs end 2018-12-31; latest annual assets end 2025-12-31

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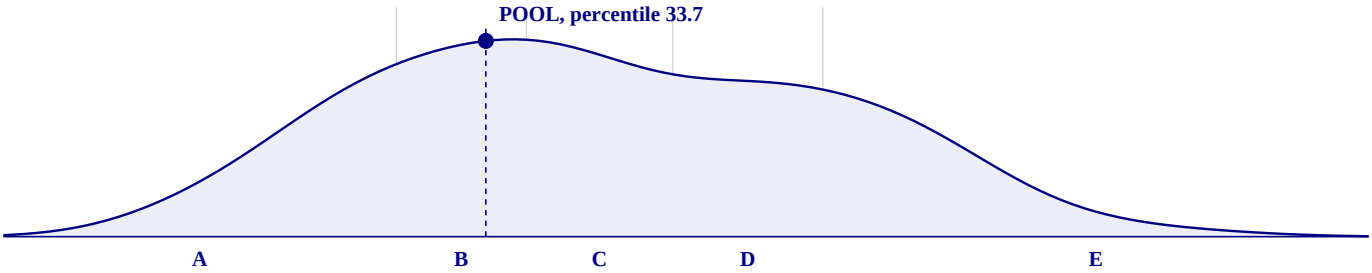
Accruals ratio	1.2%	(4.8%)	91.5	285	2025-12-31
Gross margin stability, five years	0.6 pts	1.2 pts	21.7	218	2025-12-31
Solvency, sleeve percentile 23.6					
Twelve-month failure probability	not computable	0.03%			
latest liabilities, cash plus short-term investments, book equity, and shares are required					
Altman Z double-prime	4.02	1.93	23.5	205	2025-12-31
Net debt to EBITDA	not computable	1.84x			
latest aligned inputs end 2018-12-31; latest annual assets end 2025-12-31					
Interest coverage	not computable	2.28x			
latest aligned inputs end 2011-12-31; latest annual assets end 2025-12-31					
Current ratio	2.24x	1.38x	23.6	293	2025-12-31
Growth and financing, sleeve percentile 54.5					
Revenue growth, three-year compound	(5.1%)	1.6%	76.3	267	2025-12-31
Free cash flow growth, three-year compound	(11.1%)	5.2%	79.6	148	2025-12-31
Reinvestment rate	49.4%	8.4%	27.2	152	2025-12-31
Asset growth, three years	0.6%	3.4%	58.7	270	2025-12-31
Net share issuance, one year	(2.2%)	(0.6%)	30.9	208	2026-02-20

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
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	
89	Flanigans Enterprises Inc. (BDL)	34.5	B	late filer, fortress balance sheet
90	Live Ventures Inc. (LIVE)	34.9	B	
91	Cencora, Inc. (COR)	35.3	B	
92	Reborn Coffee, Inc. (REBN)	35.7	B	dilution, late filer, 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	(37.9%)	(0.4%)	17
Distance from 52-week high	(25.7%)	(20.3%)	42
EBIT to enterprise value	6.9%	5.2%	70
Free cash flow yield	4.2%	3.9%	53
Book value to price	0.17	0.35	33

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Sales to price	0.72	1.59	26
Composite equity issuance, five years	(19.7%)	(16.8%)	41
Relative strength against the sector, log excess return	(0.38)	0.09	17

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 6 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	fail
Long-term leverage fell	fail
Current ratio improved	pass
No new shares issued	pass
Gross margin improved	pass
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	n/a
Operating cash flow, four quarters	n/a
Months of runway	not finite
Days since last periodic filing	4 (10-Q received Oct 28, 2026)
Median daily dollar volume, 63 sessions	$119.6M

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	$1.6B	2025-12-31	2026-02-26	10-K	26-074833
2	assets	us-gaap:Assets	$3.6B	2025-12-31	2026-02-26	10-K	26-074833
3	operating income	us-gaap:OperatingIncomeLoss	$313.9M	2018-12-31	2021-02-25	10-K	21-000022
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$293.0M	2018-12-31	2021-02-25	10-K	21-000022
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$58.8M	2018-12-31	2021-02-25	10-K	21-000022
6	total debt	us-gaap:LongTermDebt	$666.8M	2018-12-31	2019-02-27	10-K	19-000013
7	book equity	us-gaap:StockholdersEquity	$223.6M	2018-12-31	2022-02-25	10-K	22-000023
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$16.4M	2018-12-31	2019-02-27	10-K	19-000013
9	total debt	us-gaap:LongTermDebt	$519.6M	2017-12-31	2019-02-27	10-K	19-000013
10	book equity	us-gaap:StockholdersEquity	$223.1M	2017-12-31	2021-02-25	10-K	21-000022
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$29.9M	2017-12-31	2019-02-27	10-K	19-000013
12	net income	us-gaap:NetIncomeLoss	$406.4M	2025-12-31	2026-02-26	10-K	26-074833
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$365.9M	2025-12-31	2026-02-26	10-K	26-074833
14	assets	us-gaap:Assets	$3.4B	2024-12-31	2026-02-26	10-K	26-074833
15	revenue	us-gaap:Revenues	$5.3B	2025-12-31	2026-02-26	10-K	26-074833
16	gross profit	us-gaap:GrossProfit	$1.6B	2024-12-31	2026-02-26	10-K	26-074833
17	revenue	us-gaap:Revenues	$5.3B	2024-12-31	2026-02-26	10-K	26-074833
18	gross profit	us-gaap:GrossProfit	$1.7B	2023-12-31	2026-02-26	10-K	26-074833
19	revenue	us-gaap:Revenues	$5.5B	2023-12-31	2026-02-26	10-K	26-074833
20	gross profit	us-gaap:GrossProfit	$1.9B	2022-12-31	2025-02-27	10-K	25-000032
21	revenue	us-gaap:Revenues	$6.2B	2022-12-31	2025-02-27	10-K	25-000032
22	gross profit	us-gaap:GrossProfit	$1.6B	2021-12-31	2024-02-27	10-K	24-000021
23	revenue	us-gaap:Revenues	$5.3B	2021-12-31	2024-02-27	10-K	24-000021
24	current assets	us-gaap:AssetsCurrent	$2.0B	2025-12-31	2026-02-26	10-K	26-074833
25	current liabilities	us-gaap:LiabilitiesCurrent	$880.3M	2025-12-31	2026-02-26	10-K	26-074833
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$520.7M	2025-12-31	2026-02-26	10-K	26-074833
27	operating income	us-gaap:OperatingIncomeLoss	$580.2M	2025-12-31	2026-02-26	10-K	26-074833

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28	book equity	us-gaap:StockholdersEquity	$1.2B	2025-12-31	2026-02-26	10-K	26-074833
29	liabilities	us-gaap:Liabilities	$2.4B	2025-12-31	2026-02-26	10-K	26-074833
30	depreciation amortization	us-gaap:Depreciation	$26.1M	2018-12-31	2021-02-25	10-K	21-000022
31	operating income	us-gaap:OperatingIncomeLoss	$125.1M	2011-12-31	2014-02-27	10-K	14-000019
32	interest expense	us-gaap:InterestExpense	$8.0M	2011-12-31	2012-02-29	10-K	12-000018
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$56.3M	2025-12-31	2026-02-26	10-K	26-074833
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$659.2M	2024-12-31	2026-02-26	10-K	26-074833
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$59.5M	2024-12-31	2026-02-26	10-K	26-074833
36	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$888.2M	2023-12-31	2026-02-26	10-K	26-074833
37	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$60.1M	2023-12-31	2026-02-26	10-K	26-074833
38	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$484.9M	2022-12-31	2025-02-27	10-K	25-000032
39	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$43.6M	2022-12-31	2025-02-27	10-K	25-000032
40	depreciation amortization	us-gaap:Depreciation	$42.7M	2025-12-31	2026-02-26	10-K	26-074833
41	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$533.4M	2025-12-31	2026-02-26	10-K	26-074833
42	income tax	us-gaap:IncomeTaxExpenseBenefit	$127.1M	2025-12-31	2026-02-26	10-K	26-074833
43	current assets	us-gaap:AssetsCurrent	$1.7B	2024-12-31	2026-02-26	10-K	26-074833
44	current liabilities	us-gaap:LiabilitiesCurrent	$844.2M	2024-12-31	2026-02-26	10-K	26-074833
45	assets	us-gaap:Assets	$3.4B	2023-12-31	2025-02-27	10-K	25-000032
46	assets	us-gaap:Assets	$3.6B	2022-12-31	2024-02-27	10-K	24-000021
47	shares outstanding	dei:EntityCommonStockSharesOutstanding	36,787,820	2026-02-20	2026-02-26	10-K	26-074833
48	shares outstanding	dei:EntityCommonStockSharesOutstanding	37,630,465	2025-02-20	2025-02-27	10-K	25-000032