SiteOne Landscape Supply, Inc.

SITE

NYSE; shops; SIC 5040, Wholesale-Professional & Commercial Equipment & Supplies; CIK 0001650729

A

strongest fifth of 256 graded peers in shops

rank 12 of 256; percentile 4.3; sampling error 2.9 points; lower is stronger

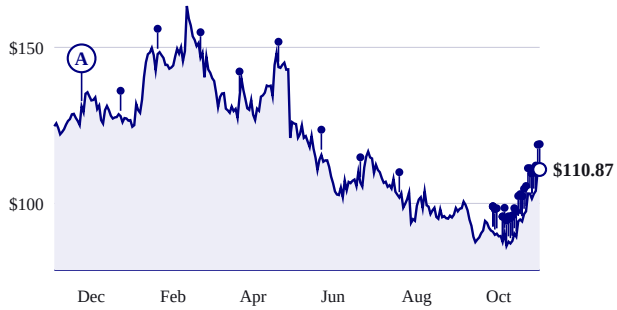
A B C D E

A, the bull



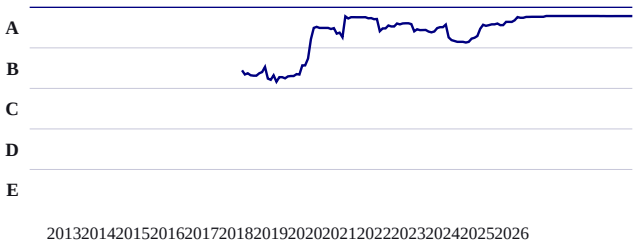
Scoreboard	
Profitability	B/C percentile 37.3
Solvency	A/B percentile 18.8
Growth and financing	B percentile 34.3
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $3.2B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress
Inputs computable	10 of 14
Graded from	filings received through Feb 19, 2026 256 days before the rescan; latest periodic filing 10-Q received Oct 28, 2026
Last close	$110.79 2026-10-30; market equity $4.8B; 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 19, 2026

The following discussion of our business contains "forward-looking statements," as discussed in "Special Note Regarding Forward-Looking Statements and Information" above. Our business, operations, and financial condition are subject to various risks as set forth in Part I,

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 37.3						
Gross profitability	50.8%	42.0%		35.6	240	2025-12-28
Return on invested capital	10.0%	10.9%		53.0	84	2025-12-28
Accruals ratio	(4.7%)	(4.8%)		54.6	285	2025-12-28
Gross margin stability, five years	0.3 pts	1.2 pts		6.0	218	2025-12-28
Solvency, sleeve percentile 18.8						

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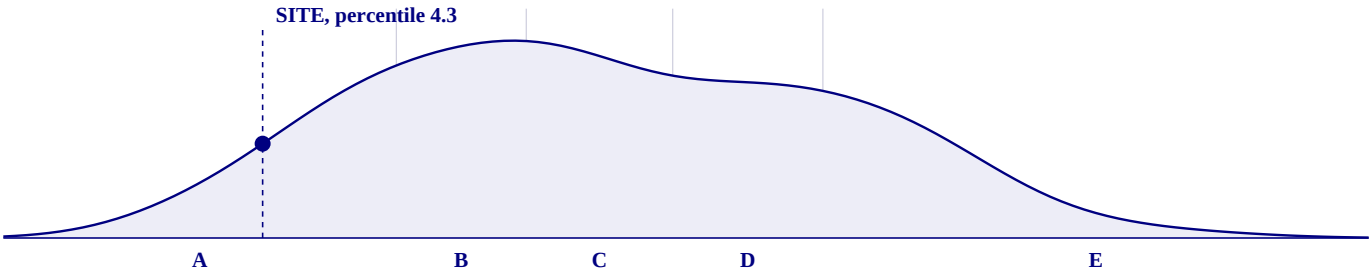
Twelve-month failure probability	not computable	0.03%				
four consecutive discrete net-income quarters are required; found 4						
Altman Z double-prime	4.90	1.93		16.7	205	2025-12-28
Net debt to EBITDA	not computable	1.84x				
latest aligned inputs end 2018-12-30; latest annual assets end 2025-12-28						
Interest coverage	not computable	2.28x				
latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-28						
Current ratio	2.47x	1.38x		20.9	293	2025-12-28
Growth and financing, sleeve percentile 34.3						
Revenue growth, three-year compound	5.4%	1.6%		29.3	267	2025-12-28
Free cash flow growth, three-year compound	9.1%	5.2%		42.2	148	2025-12-28
Reinvestment rate	not computable	8.4%				
latest aligned inputs end 2018-12-30; latest annual assets end 2025-12-28						
Asset growth, three years	8.3%	3.4%		26.0	270	2025-12-28
Net share issuance, one year	(1.1%)	(0.6%)		39.6	208	2026-02-13

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
7	Brinker International, Inc. (EAT)	2.4	A	
8	Fastenal Co. (FAST)	2.7	A	fortress balance sheet
9	DXP Enterprises Inc. (DXPE)	3.1	A	
10	Ross Stores, Inc. (ROST)	3.5	A	fortress balance sheet
11	Global Industrial Co. (GIC)	3.9	A	
12	SiteOne Landscape Supply, Inc. (SITE)	4.3	A	
13	Costco Wholesale Corp. (COST)	4.7	A	fortress balance sheet
14	Ulta Beauty, Inc. (ULTA)	5.1	A	
15	Tractor Supply Co. (TSCO)	5.5	A	fortress balance sheet
16	W.W. Grainger, Inc. (GWW)	5.9	A	
17	Chipotle Mexican Grill Inc. (CMG)	6.3	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	(30.4%)	(0.4%)	22
Distance from 52-week high	(32.1%)	(20.3%)	33
EBIT to enterprise value	4.6%	5.2%	41
Free cash flow yield	5.2%	3.9%	61
Book value to price	0.35	0.35	51
Sales to price	0.98	1.59	36
Composite equity issuance, five years	(2.8%)	(16.8%)	75
Relative strength against the sector, log excess return	(0.27)	0.09	22

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Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 8 of 9, period end 2025-12-28	
Return on assets above zero	pass
Operating cash flow above zero	pass
Return on assets improved	pass
Operating cash flow exceeds net income	pass
Long-term leverage fell	pass
Current ratio improved	pass
No new shares issued	pass
Gross margin improved	pass
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$88.4M
Operating cash flow, four quarters	$321.5M
Months of runway	not finite
Days since last periodic filing	5 (10-Q received Oct 28, 2026)
Median daily dollar volume, 63 sessions	$82.7M

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	2025-12-28	2026-02-19	10-K	26-000005
2	assets	us-gaap:Assets	$3.2B	2025-12-28	2026-02-19	10-K	26-000005
3	operating income	us-gaap:OperatingIncomeLoss	$238.1M	2025-12-28	2026-02-19	10-K	26-000005
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$203.1M	2025-12-28	2026-02-19	10-K	26-000005
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$45.7M	2025-12-28	2026-02-19	10-K	26-000005
6	total debt	us-gaap:LongTermDebt	$385.4M	2025-12-28	2026-02-19	10-K	26-000005
7	book equity	us-gaap:StockholdersEquity	$1.7B	2025-12-28	2026-02-19	10-K	26-000005
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$190.6M	2025-12-28	2026-02-19	10-K	26-000005
9	total debt	us-gaap:LongTermDebt	$388.2M	2024-12-29	2026-02-19	10-K	26-000005
10	book equity	us-gaap:StockholdersEquity	$1.6B	2024-12-29	2026-02-19	10-K	26-000005
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$107.1M	2024-12-29	2026-02-19	10-K	26-000005
12	net income	us-gaap:NetIncomeLoss	$151.8M	2025-12-28	2026-02-19	10-K	26-000005
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$300.5M	2025-12-28	2026-02-19	10-K	26-000005
14	assets	us-gaap:Assets	$3.1B	2024-12-29	2026-02-19	10-K	26-000005
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.7B	2025-12-28	2026-02-19	10-K	26-000005
16	gross profit	us-gaap:GrossProfit	$1.6B	2024-12-29	2026-02-19	10-K	26-000005
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.5B	2024-12-29	2026-02-19	10-K	26-000005
18	gross profit	us-gaap:GrossProfit	$1.5B	2023-12-31	2026-02-19	10-K	26-000005
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.3B	2023-12-31	2026-02-19	10-K	26-000005
20	gross profit	us-gaap:GrossProfit	$1.4B	2023-01-01	2025-02-20	10-K	25-000004
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.0B	2023-01-01	2025-02-20	10-K	25-000004
22	gross profit	us-gaap:GrossProfit	$1.2B	2022-01-02	2024-02-22	10-K	24-000004
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$3.5B	2022-01-02	2024-02-22	10-K	24-000004
24	current assets	us-gaap:AssetsCurrent	$1.7B	2025-12-28	2026-02-19	10-K	26-000005
25	current liabilities	us-gaap:LiabilitiesCurrent	$686.8M	2025-12-28	2026-02-19	10-K	26-000005
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$1.2B	2025-12-28	2026-02-19	10-K	26-000005
27	liabilities	us-gaap:Liabilities	$1.5B	2025-12-28	2026-02-19	10-K	26-000005
28	total debt	us-gaap:LongTermDebt	$558.2M	2018-12-30	2020-02-26	10-K	20-000004
29	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$17.3M	2018-12-30	2020-02-26	10-K	20-000004
30	operating income	us-gaap:OperatingIncomeLoss	$107.3M	2018-12-30	2021-03-03	10-K	21-000006
31	depreciation amortization	us-gaap:Depreciation	$21.5M	2018-12-30	2019-02-27	10-K	19-000004

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32	operating income	us-gaap:OperatingIncomeLoss	$250.3M	2023-12-31	2026-02-19	10-K	26-000005
33	interest expense	us-gaap:InterestExpense	$27.1M	2023-12-31	2024-02-22	10-K	24-000004
34	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$53.7M	2025-12-28	2026-02-19	10-K	26-000005
35	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$283.4M	2024-12-29	2026-02-19	10-K	26-000005
36	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$40.5M	2024-12-29	2026-02-19	10-K	26-000005
37	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$297.5M	2023-12-31	2026-02-19	10-K	26-000005
38	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$32.1M	2023-12-31	2026-02-19	10-K	26-000005
39	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$217.2M	2023-01-01	2025-02-20	10-K	25-000004
40	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$27.1M	2023-01-01	2025-02-20	10-K	25-000004
41	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$14.9M	2018-12-30	2021-03-03	10-K	21-000006
42	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$75.2M	2018-12-30	2021-03-03	10-K	21-000006
43	income tax	us-gaap:IncomeTaxExpenseBenefit	$1.3M	2018-12-30	2021-03-03	10-K	21-000006
44	current assets	us-gaap:AssetsCurrent	$765.4M	2018-12-30	2020-02-26	10-K	20-000004
45	current liabilities	us-gaap:LiabilitiesCurrent	$282.4M	2018-12-30	2020-02-26	10-K	20-000004
46	current assets	us-gaap:AssetsCurrent	$601.9M	2017-12-31	2019-02-27	10-K	19-000004
47	current liabilities	us-gaap:LiabilitiesCurrent	$205.8M	2017-12-31	2019-02-27	10-K	19-000004
48	assets	us-gaap:Assets	$2.8B	2023-12-31	2025-02-20	10-K	25-000004
49	assets	us-gaap:Assets	$2.5B	2023-01-01	2024-02-22	10-K	24-000004
50	shares outstanding	dei:EntityCommonStockSharesOutstanding	44,459,316	2026-02-13	2026-02-19	10-K	26-000005
51	shares outstanding	dei:EntityCommonStockSharesOutstanding	44,964,924	2025-02-14	2025-02-20	10-K	25-000004

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