# C. H. Robinson Worldwide, Inc.

**CHRW**

Nasdaq; other; SIC 4731, Arrangement of Transportation of Freight & Cargo; CIK 0001043277

**B**

**second fifth of 334 graded peers in other**

rank 101 of 334; percentile 30.0; sampling error 2.7 points; lower is stronger

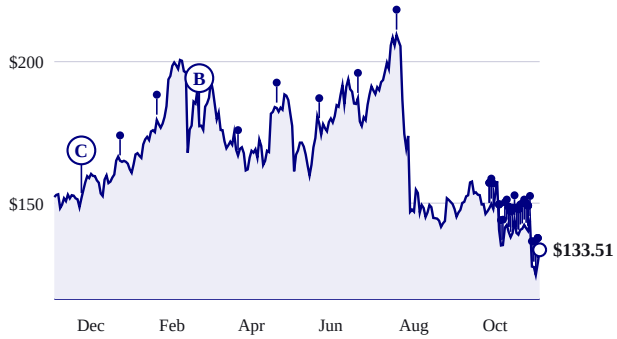
A B C D E

**B, the elk**



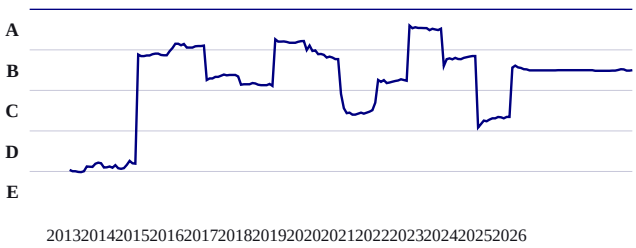
| Scoreboard | |
|---|---|
| **Profitability** | B<br>percentile 32.1 |
| **Solvency** | B<br>percentile 26.2 |
| **Growth and financing** | D<br>percentile 66.8 |
| **Reliability** | 0.94 AUC<br>filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025 |
| **Peer failure rate** | 0.52% a year<br>Item 1.03 bankruptcies, same asset band, 2012 to 2025 |
| **Size band** | over $2.67B assets<br>total assets $5.1B |
| **Standard universe** | inside<br>revenue above $1M and assets above $10M |
| **Warnings** | none triggered<br>not computable: distress |
| **Inputs computable** | 10 of 14 |
| **Graded from** | filings received through Feb 13, 2026<br>264 days before the rescan; latest periodic filing 10-Q received Oct 30, 2026 |
| **Last close** | $133.57<br>2026-11-03; market equity $15.5B; 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 Feb 13, 2026*

C.H. Robinson Worldwide, Inc. ("C.H. Robinson," "the company," "we," "us," or "our") is one of the largest global logistics providers in the world, with consolidated total revenues of $16.2 billion in 2025. As a leader in Lean artificial intelligence ("AI") supply chains, we deliver logistics like no one else. For more than a century, companies everywhere have looked to us to reimagine how goods move. We deliver tailored solutions across the world via truckload, less-than-truckload, ocean, air, and more. With our unique combination of human insight and Lean AI working as one, supply chains move faster, smarter, and more sustainably.

## The fourteen inputs

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

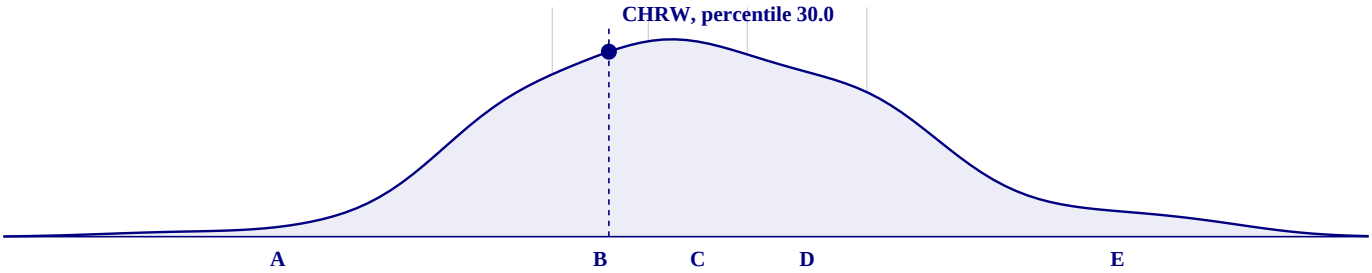
| Input | Value | Peer median | Percentile, 0 to 100 | Pct | Peers | Period end |
|---|---|---|---|---|---|---|
| **Profitability, sleeve percentile 32.1** | | | | | | |
| Gross profitability | not computable | 27.1% | | | | |
| *one or more required annual facts are missing* | | | | | | |
| Return on invested capital | 22.6% | 10.0% | | 18.0 | 151 | 2025-12-31 |

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.

| | | | | | |
|---|---|---|---|---|---|
| Accruals ratio | (6.3%) | (5.8%) | 46.1 | 502 | 2025-12-31 |
| Gross margin stability, five years | not computable | 2.2 pts | | | |
| *five annual gross margins are required; found 0* | | | | | |
| **Solvency, sleeve percentile 26.2** | | | | | |
| 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 | 6.83 | 2.06 | 8.5 | 387 | 2025-12-31 |
| Net debt to EBITDA | 1.12x | 2.51x | 28.9 | 181 | 2025-12-31 |
| Interest coverage | not computable | 2.45x | | | |
| *one or more required annual facts are missing* | | | | | |
| Current ratio | 1.53x | 1.33x | 41.1 | 507 | 2025-12-31 |
| **Growth and financing, sleeve percentile 66.8** | | | | | |
| Revenue growth, three-year compound | (13.1%) | 5.1% | 91.1 | 396 | 2025-12-31 |
| Free cash flow growth, three-year compound | (17.4%) | 8.9% | 80.2 | 218 | 2025-12-31 |
| Reinvestment rate | 47.9% | 11.9% | 33.9 | 190 | 2025-12-31 |
| Asset growth, three years | (5.3%) | 4.1% | 81.9 | 432 | 2025-12-31 |
| Net share issuance, one year | (0.07%) | (0.5%) | 46.7 | 352 | 2026-02-11 |

## Among 334 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 |
|---|---|---|---|---|
| 96 | Landstar System Inc. (LSTR) | 28.5 | B | late filer, fortress balance sheet |
| 97 | Barrett Business Services Inc. (BBSI) | 28.8 | B | |
| 98 | Franklin Covey Co. (FC) | 29.1 | B | fortress balance sheet |
| 99 | Acorn Energy, Inc. (ACFN) | 29.4 | B | fortress balance sheet |
| 100 | Planet Fitness, Inc. (PLNT) | 29.7 | B | |
| 101 | C. H. Robinson Worldwide, Inc. (CHRW) | 30.0 | B | |
| 102 | National CineMedia, Inc. (NCMI) | 30.3 | B | fortress balance sheet |
| 103 | Charles River Laboratories International, Inc. (CRL) | 30.6 | B | |
| 104 | Century Casinos Inc. (CNTY) | 30.9 | B | late filer |
| 105 | Vulcan Materials Co. (VMC) | 31.2 | B | |
| 106 | Broadridge Financial Solutions, Inc. (BR) | 31.5 | B | |

## What the price implies

*at the 2026-11-03 close; none of these enters the grade*

| Measure | Value | Peer median | Percentile |
|---|---|---|---|
| Twelve-month price change, skipping the latest month | (2.9%) | (0.6%) | 48 |
| Distance from 52-week high | (36.2%) | (22.7%) | 33 |
| EBIT to enterprise value | 4.6% | 4.2% | 53 |
| Free cash flow yield | 5.8% | 4.1% | 63 |
| Book value to price | 0.10 | 0.34 | 18 |
| Sales to price | 1.05 | 0.69 | 62 |

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| | | | |
|---|---|---|---|
| Composite equity issuance, five years | (26.9%) | (8.8%) | 19 |
| Relative strength against the sector, log excess return | (0.15) | (0.13) | 48 |

## Diagnostics

*shown on every report; none enters the grade*

| Measure | Value |
|---|---|
| **Piotroski F-score None of 9, period end 2025-12-31** | |
| 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 | fail |
| Current ratio improved | pass |
| No new shares issued | pass |
| Gross margin improved | fail |
| Asset turnover improved | fail |
| **Cash, filings, liquidity** | |
| Cash and equivalents | $193.1M |
| Operating cash flow, four quarters | $534.0M |
| Months of runway | not finite |
| Days since last periodic filing | 5 (10-Q received Oct 30, 2026) |
| Median daily dollar volume, 63 sessions | $211.4M |

## 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 | operating income | us-gaap:OperatingIncomeLoss | $795.0M | 2025-12-31 | 2026-02-13 | 10-K | 26-000009 |
| 2 | pretax income | us-gaap:IncomeLossFromContinuingOperationsBeforeInc... | $722.5M | 2025-12-31 | 2026-02-13 | 10-K | 26-000009 |
| 3 | income tax | us-gaap:IncomeTaxExpenseBenefit | $135.4M | 2025-12-31 | 2026-02-13 | 10-K | 26-000009 |
| 4 | total debt | us-gaap:LongTermDebt | $1.1B | 2025-12-31 | 2026-02-13 | 10-K | 26-000009 |
| 5 | book equity | us-gaap:StockholdersEquity | $1.8B | 2025-12-31 | 2026-02-13 | 10-K | 26-000009 |
| 6 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $160.9M | 2025-12-31 | 2026-02-13 | 10-K | 26-000009 |
| 7 | total debt | us-gaap:LongTermDebt | $1.4B | 2024-12-31 | 2026-02-13 | 10-K | 26-000009 |
| 8 | book equity | us-gaap:StockholdersEquity | $1.7B | 2024-12-31 | 2026-02-13 | 10-K | 26-000009 |
| 9 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $145.8M | 2024-12-31 | 2026-02-13 | 10-K | 26-000009 |
| 10 | net income | us-gaap:NetIncomeLoss | $587.1M | 2025-12-31 | 2026-02-13 | 10-K | 26-000009 |
| 11 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $914.5M | 2025-12-31 | 2026-02-13 | 10-K | 26-000009 |
| 12 | assets | us-gaap:Assets | $5.1B | 2025-12-31 | 2026-02-13 | 10-K | 26-000009 |
| 13 | assets | us-gaap:Assets | $5.3B | 2024-12-31 | 2026-02-13 | 10-K | 26-000009 |
| 14 | current assets | us-gaap:AssetsCurrent | $2.8B | 2025-12-31 | 2026-02-13 | 10-K | 26-000009 |
| 15 | current liabilities | us-gaap:LiabilitiesCurrent | $1.8B | 2025-12-31 | 2026-02-13 | 10-K | 26-000009 |
| 16 | retained earnings | us-gaap:RetainedEarningsAccumulatedDeficit | $6.1B | 2025-12-31 | 2026-02-13 | 10-K | 26-000009 |
| 17 | liabilities | us-gaap:Liabilities | $3.2B | 2025-12-31 | 2026-02-13 | 10-K | 26-000009 |
| 18 | depreciation amortization | us-gaap:Depreciation | $32.5M | 2025-12-31 | 2026-02-13 | 10-K | 26-000009 |
| 19 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $16.2B | 2025-12-31 | 2026-02-13 | 10-K | 26-000009 |
| 20 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $17.7B | 2024-12-31 | 2026-02-13 | 10-K | 26-000009 |
| 21 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $17.6B | 2023-12-31 | 2026-02-13 | 10-K | 26-000009 |
| 22 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $24.7B | 2022-12-31 | 2025-02-14 | 10-K | 25-000012 |
| 23 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $19.6M | 2025-12-31 | 2026-02-13 | 10-K | 26-000009 |
| 24 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $509.1M | 2024-12-31 | 2026-02-13 | 10-K | 26-000009 |
| 25 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $22.7M | 2024-12-31 | 2026-02-13 | 10-K | 26-000009 |
| 26 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $731.9M | 2023-12-31 | 2026-02-13 | 10-K | 26-000009 |
| 27 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $30.0M | 2023-12-31 | 2026-02-13 | 10-K | 26-000009 |
| 28 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $1.7B | 2022-12-31 | 2025-02-14 | 10-K | 25-000012 |
| 29 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $61.9M | 2022-12-31 | 2025-02-14 | 10-K | 25-000012 |

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| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| 30 | current assets | us-gaap:AssetsCurrent | $3.0B | 2024-12-31 | 2026-02-13 | 10-K | 26-000009 |
| 31 | current liabilities | us-gaap:LiabilitiesCurrent | $2.3B | 2024-12-31 | 2026-02-13 | 10-K | 26-000009 |
| 32 | assets | us-gaap:Assets | $5.2B | 2023-12-31 | 2026-02-13 | 10-K | 26-000009 |
| 33 | assets | us-gaap:Assets | $6.0B | 2022-12-31 | 2025-02-14 | 10-K | 25-000012 |
| 34 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 118,620,833 | 2026-02-11 | 2026-02-13 | 10-K | 26-000009 |
| 35 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 118,705,622 | 2025-02-12 | 2025-02-14 | 10-K | 25-000012 |

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