# Omnicom Group Inc.

**OMC**

NYSE; other; SIC 7311, Services-Advertising Agencies; CIK 0000029989

# D/E

**on the D/E boundary of 334 graded peers in other**

rank 272 of 334; percentile 81.4; sampling error 2.7 points; lower is stronger

A B C D E

**D/E, the sloth**



## Scoreboard

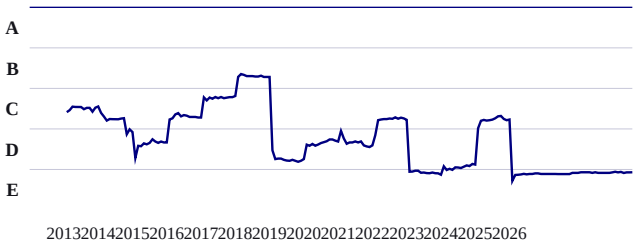
| | | |
|---|---|---|
| **Profitability** | D | percentile 66.7 |
| **Solvency** | C/D | percentile 58.7 |
| **Growth and financing** | C | percentile 51.9 |
| **Reliability** | 0.94 AUC | filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025 |
| **Peer failure rate** | 0.52% a year | Item 1.03 bankruptcies, same asset band, 2012 to 2025 |
| **Size band** | over $2.67B assets | total assets $54.4B |
| **Standard universe** | inside | revenue above $1M and assets above $10M |
| **Warnings** | dilution | not computable: short runway, distress |
| **Inputs computable** | 10 of 14 | |
| **Graded from** | filings received through Feb 20, 2026 | 257 days before the rescan; latest periodic filing 10-Q received Oct 23, 2026 |
| **Last close** | $83.14 | 2026-11-03; market equity $22.7B; 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 20, 2026*

On November 26, 2025 (the "Closing Date"), Omnicom completed its Merger with IPG (the "Merger"). As previously reported, on December 8, 2024, Omnicom entered into an Agreement and Plan of Merger (the "Merger Agreement") with IPG and EXT Subsidiary Inc., a Delaware corporation and a direct wholly owned subsidiary of Omnicom ("Merger Sub"). On the Closing Date, pursuant to the terms and conditions of the Merger Agreement, Merger Sub merged with and into IPG, with IPG continuing as the surviving corporation and a direct wholly owned subsidiary of Omnicom.

## 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 66.7** | | | | | | |
| Gross profitability | 2.7% | 27.1% | | 89.8 | 286 | 2025-12-31 |
| Return on invested capital | not computable | 10.0% | | | | |

*latest aligned inputs end 2021-12-31; latest annual assets end 2025-12-31*

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| | | | | | |
|---|---|---|---|---|---|
| Accruals ratio | (7.1%) | (5.8%) | 40.9 | 502 | 2025-12-31 |
| Gross margin stability, five years | 4.2 pts | 2.2 pts | 69.5 | 204 | 2025-12-31 |
| **Solvency, sleeve percentile 58.7** | | | | | |
| Twelve-month failure probability | not computable | 0.04% | | | |
| *liabilities and a nearby cover-page share count are required at 2026-09-30* | | | | | |
| Altman Z double-prime | not computable | 2.06 | | | |
| *one or more required annual facts are missing* | | | | | |
| Net debt to EBITDA | not computable | 2.51x | | | |
| *latest aligned inputs end 2021-12-31; latest annual assets end 2025-12-31* | | | | | |
| Interest coverage | 1.69x | 2.45x | 50.0 | 87 | 2025-12-31 |
| Current ratio | 0.93x | 1.33x | 67.4 | 507 | 2025-12-31 |
| **Growth and financing, sleeve percentile 51.9** | | | | | |
| Revenue growth, three-year compound | 6.5% | 5.1% | 42.3 | 396 | 2025-12-31 |
| Free cash flow growth, three-year compound | 48.7% | 8.9% | 12.9 | 218 | 2025-12-31 |
| Reinvestment rate | (3,459.5%) | 11.9% | 99.5 | 190 | 2025-12-31 |
| Asset growth, three years | 26.3% | 4.1% | 10.9 | 432 | 2025-12-31 |
| Net share issuance, one year | 57.9% | (0.5%) | 94.0 | 352 | 2026-01-30 |

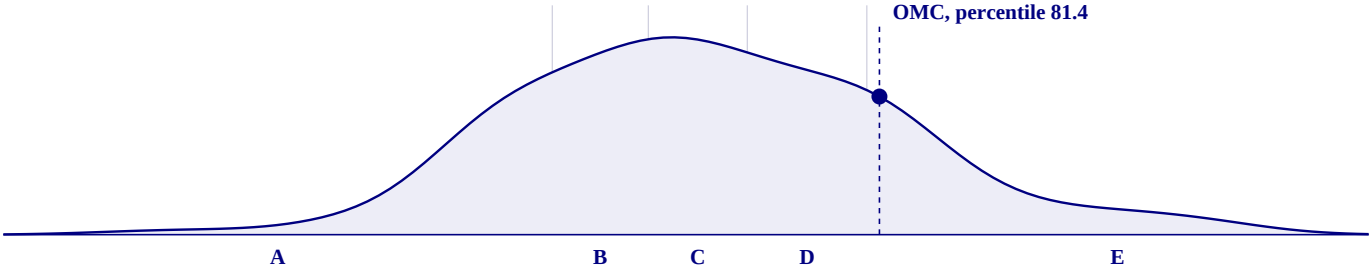
## Warnings

*1 of 7 checks triggered; none of them enters the letter*

| Check | Measured |
|---|---|
| Dilution | split-adjusted year-over-year share growth is 57.9% |

## 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 |
|---|---|---|---|---|
| 267 | Universal Logistics Holdings, Inc. (ULH) | 79.9 | D/E | |
| 268 | Outdoor Holding Co. (POWW) | 80.3 | D/E | late filer |
| 269 | Outdoor Holding Co. (POWWP) | 80.3 | D/E | late filer |
| 270 | Atlas Lithium Corp. (ATLX) | 80.8 | D/E | dilution |
| 271 | Uranium Energy Corp. (UEC) | 81.1 | D/E | fortress balance sheet |
| 272 | Omnicom Group Inc. (OMC) | 81.4 | D/E | dilution |
| 273 | Allegiant Travel Co. (ALGT) | 81.7 | D/E | |
| 274 | Seacor Marine Holdings Inc. (SMHI) | 82.0 | D/E | |
| 275 | NextTrip, Inc. (NTRP) | 82.3 | D/E | dilution, short runway |
| 276 | Access Newswire Inc. (ACCS) | 82.6 | D/E | |
| 277 | Travelzoo (TZOO) | 82.9 | E | |

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## 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 | 1.2% | (0.6%) | 52 |
| Distance from 52-week high | (6.5%) | (22.7%) | 78 |
| EBIT to enterprise value | 1.7% | 4.2% | 24 |
| Free cash flow yield | 12.3% | 4.1% | 89 |
| Book value to price | 0.44 | 0.34 | 62 |
| Sales to price | 0.76 | 0.69 | 54 |
| Composite equity issuance, five years | 4.3% | (8.8%) | 73 |
| Relative strength against the sector, log excess return | (0.11) | (0.13) | 52 |

## Diagnostics

*shown on every report; none enters the grade*

| Measure | Value |
|---|---|
| **Piotroski F-score 3 of 9, period end 2025-12-31** | |
| Return on assets above zero | fail |
| 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 | fail |
| No new shares issued | fail |
| Gross margin improved | fail |
| 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 | 12 (10-Q received Oct 23, 2026) |
| Median daily dollar volume, 63 sessions | $186.8M |

## 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 | revenue | us-gaap:Revenues | $17.3B | 2025-12-31 | 2026-02-20 | 10-K | 26-000006 |
| 2 | cost of revenue | us-gaap:CostOfGoodsAndServicesSold | $15.8B | 2025-12-31 | 2026-02-20 | 10-K | 26-000006 |
| 3 | assets | us-gaap:Assets | $54.4B | 2025-12-31 | 2026-02-20 | 10-K | 26-000006 |
| 4 | operating income | us-gaap:OperatingIncomeLoss | $2.2B | 2021-12-31 | 2024-02-07 | 10-K | 24-000007 |
| 5 | pretax income | us-gaap:IncomeLossFromContinuingOperationsBeforeInc... | $2.0B | 2021-12-31 | 2024-02-07 | 10-K | 24-000007 |
| 6 | income tax | us-gaap:IncomeTaxExpenseBenefit | $488.7M | 2021-12-31 | 2024-02-07 | 10-K | 24-000007 |
| 7 | total debt | us-gaap:LongTermDebt | $5.7B | 2021-12-31 | 2022-02-09 | 10-K | 22-000012 |
| 8 | book equity | us-gaap:StockholdersEquity | $3.3B | 2021-12-31 | 2023-02-08 | 10-K | 23-000005 |
| 9 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $5.3B | 2021-12-31 | 2022-02-09 | 10-K | 22-000012 |
| 10 | total debt | us-gaap:LongTermDebt | $5.8B | 2020-12-31 | 2021-02-18 | 10-K | 21-000004 |
| 11 | book equity | us-gaap:StockholdersEquity | $3.1B | 2020-12-31 | 2022-02-09 | 10-K | 22-000012 |
| 12 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $5.6B | 2020-12-31 | 2022-02-09 | 10-K | 22-000012 |
| 13 | net income | us-gaap:NetIncomeLoss | -$54.5M | 2025-12-31 | 2026-02-20 | 10-K | 26-000006 |
| 14 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $2.9B | 2025-12-31 | 2026-02-20 | 10-K | 26-000006 |
| 15 | assets | us-gaap:Assets | $29.6B | 2024-12-31 | 2026-02-20 | 10-K | 26-000006 |
| 16 | revenue | us-gaap:Revenues | $15.7B | 2024-12-31 | 2026-02-20 | 10-K | 26-000006 |
| 17 | cost of revenue | us-gaap:CostOfGoodsAndServicesSold | $12.8B | 2024-12-31 | 2026-02-20 | 10-K | 26-000006 |
| 18 | revenue | us-gaap:Revenues | $14.7B | 2023-12-31 | 2026-02-20 | 10-K | 26-000006 |

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| | | | | | | | |
|---|---|---|---|---|---|---|---|
| 19 | cost of revenue | us-gaap:CostOfGoodsAndServicesSold | $12.0B | 2023-12-31 | 2026-02-20 | 10-K | 26-000006 |
| 20 | revenue | us-gaap:Revenues | $14.3B | 2022-12-31 | 2025-02-05 | 10-K | 25-000009 |
| 21 | cost of revenue | us-gaap:CostOfGoodsAndServicesSold | $11.6B | 2022-12-31 | 2025-02-05 | 10-K | 25-000009 |
| 22 | revenue | us-gaap:Revenues | $14.3B | 2021-12-31 | 2024-02-07 | 10-K | 24-000007 |
| 23 | cost of revenue | us-gaap:CostOfGoodsAndServicesSold | $11.5B | 2021-12-31 | 2024-02-07 | 10-K | 24-000007 |
| 24 | depreciation amortization | us-gaap:Depreciation | $132.1M | 2021-12-31 | 2024-02-07 | 10-K | 24-000007 |
| 25 | operating income | us-gaap:OperatingIncomeLoss | $444.7M | 2025-12-31 | 2026-02-20 | 10-K | 26-000006 |
| 26 | interest expense | us-gaap:InterestExpense | $263.4M | 2025-12-31 | 2026-02-20 | 10-K | 26-000006 |
| 27 | current assets | us-gaap:AssetsCurrent | $27.5B | 2025-12-31 | 2026-02-20 | 10-K | 26-000006 |
| 28 | current liabilities | us-gaap:LiabilitiesCurrent | $29.5B | 2025-12-31 | 2026-02-20 | 10-K | 26-000006 |
| 29 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $149.8M | 2025-12-31 | 2026-02-20 | 10-K | 26-000006 |
| 30 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $1.7B | 2024-12-31 | 2026-02-20 | 10-K | 26-000006 |
| 31 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $140.6M | 2024-12-31 | 2026-02-20 | 10-K | 26-000006 |
| 32 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $1.4B | 2023-12-31 | 2026-02-20 | 10-K | 26-000006 |
| 33 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $78.4M | 2023-12-31 | 2026-02-20 | 10-K | 26-000006 |
| 34 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $926.5M | 2022-12-31 | 2025-02-05 | 10-K | 25-000009 |
| 35 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $78.2M | 2022-12-31 | 2025-02-05 | 10-K | 25-000009 |
| 36 | depreciation amortization | us-gaap:Depreciation | $145.1M | 2025-12-31 | 2026-02-20 | 10-K | 26-000006 |
| 37 | pretax income | us-gaap:IncomeLossFromContinuingOperationsBeforeInc... | $278.2M | 2025-12-31 | 2026-02-20 | 10-K | 26-000006 |
| 38 | income tax | us-gaap:IncomeTaxExpenseBenefit | $242.2M | 2025-12-31 | 2026-02-20 | 10-K | 26-000006 |
| 39 | current assets | us-gaap:AssetsCurrent | $16.2B | 2024-12-31 | 2026-02-20 | 10-K | 26-000006 |
| 40 | current liabilities | us-gaap:LiabilitiesCurrent | $16.3B | 2024-12-31 | 2026-02-20 | 10-K | 26-000006 |
| 41 | assets | us-gaap:Assets | $28.0B | 2023-12-31 | 2025-02-05 | 10-K | 25-000009 |
| 42 | assets | us-gaap:Assets | $27.0B | 2022-12-31 | 2024-02-07 | 10-K | 24-000007 |
| 43 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 310,336,344 | 2026-01-30 | 2026-02-20 | 10-K | 26-000006 |
| 44 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 196,490,662 | 2025-01-30 | 2025-02-05 | 10-K | 25-000009 |

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