BlueLinx Holdings Inc. BXC

NYSE; shops; SIC 5031, Wholesale-Lumber, Plywood, Millwork & Wood Panels; CIK 0001301787

C

middle fifth of 254 graded peers in shops

rank 145 of 254; percentile 56.9; sampling error 3.0 points; lower is stronger

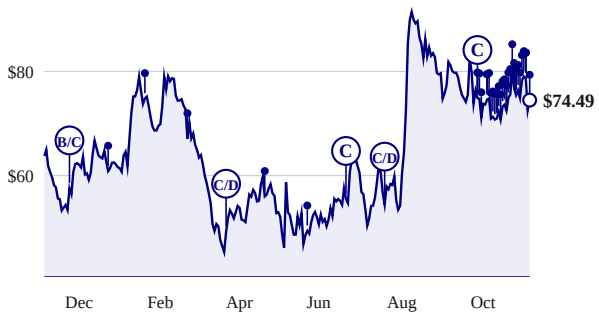
A B C D E

C, the tortoise



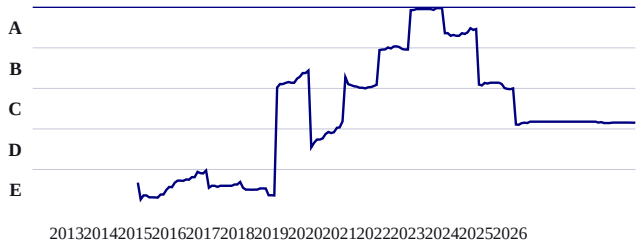
Scoreboard	
Profitability	C/D percentile 60.5
Solvency	B percentile 28.3
Growth and financing	D percentile 64.6
Reliability	0.91 AUC filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025
Peer failure rate	1.01% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$591M to $2.67B assets total assets $1.5B
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 24, 2026 254 days before the rescan; latest periodic filing 10-Q received Nov 3, 2026
Last close	$75.01 2026-11-04; market equity $589.9M; 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 24, 2026

BlueLinx is a leading wholesale distributor of residential and commercial building products in the United States. We are a "two-step" distributor. Two-step distributors purchase products from manufacturers and distribute those products to dealers and other suppliers in local markets, who then sell those products to end users. We carry a broad portfolio of both branded and private-label stock keeping units ("SKUs") across two principal product categories: specialty products and structural products. Specialty products include items such as engineered wood products ("EWP"), siding, millwork, outdoor living products, specialty lumber and panels, and industrial 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 60.5						
Gross profitability	29.2%	42.6%		70.0	238	2026-01-03
Return on invested capital	not computable	10.9%				

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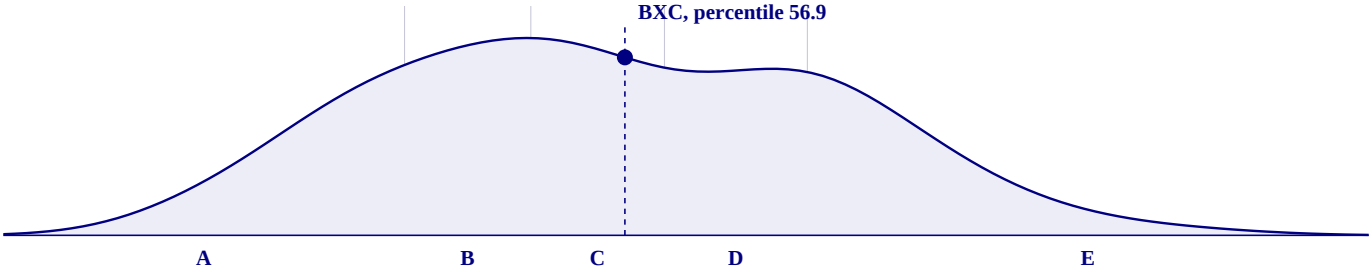
pretax income must exceed the validity floor and imply a 0%-100% tax rate						
Accruals ratio	(3.8%)	(4.8%)		63.5	283	2026-01-03
Gross margin stability, five years	1.2 pts	1.3 pts		47.9	216	2026-01-03
Solvency, sleeve percentile 28.3						
Twelve-month failure probability	not computable	0.03%				
latest liabilities, cash plus short-term investments, book equity, and shares are required						
Altman Z double-prime	5.21	1.93		14.3	204	2026-01-03
Net debt to EBITDA	2.90x	1.37x		65.3	99	2026-01-03
Interest coverage	not computable	3.83x				
latest aligned inputs end 2023-12-30; latest annual assets end 2026-01-03						
Current ratio	4.66x	1.37x		5.2	291	2026-01-03
Growth and financing, sleeve percentile 64.6						
Revenue growth, three-year compound	(12.8%)	1.6%		90.5	265	2026-01-03
Free cash flow growth, three-year compound	(55.2%)	4.6%		97.4	152	2026-01-03
Reinvestment rate	not computable	12.2%				
pretax income must exceed the validity floor and imply a 0%-100% tax rate						
Asset growth, three years	1.3%	3.4%		57.1	267	2026-01-03
Net share issuance, one year	(5.2%)	(0.6%)		13.5	209	2026-02-20

Among 254 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
140	Cheesecake Factory Inc. (CAKE)	54.9	C	
141	Victoria's Secret & Co. (VSXY)	55.3	C	
142	Penske Automotive Group, Inc. (PAG)	55.7	C	
143	Arrow Electronics, Inc. (ARW)	56.1	C	
144	Natural Health Trends Corp. (NHTC)	56.5	C	
145	BlueLinx Holdings Inc. (BXC)	56.9	C	
146	Grocery Outlet Holding Corp. (GO)	57.3	C/D	
147	Autozone Inc. (AZO)	57.7	C/D	
148	Kroger Co. (KR)	58.1	C/D	
149	Distribution Solutions Group, Inc. (DSGR)	58.5	C/D	
150	United Natural Foods Inc. (UNFI)	58.9	C/D	

What the price implies

at the 2026-11-04 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	8.7%	(0.7%)	61
Distance from 52-week high	(18.5%)	(17.6%)	47
EBIT to enterprise value	3.9%	5.0%	36
Free cash flow yield	5.6%	3.8%	66
Book value to price	1.07	0.34	87

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Sales to price	5.04	1.53	84
Composite equity issuance, five years	(18.6%)	(16.9%)	44
Relative strength against the sector, log excess return	0.17	0.08	61

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 4 of 9, period end 2026-01-03	
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	fail
No new shares issued	pass
Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$349.8M
Operating cash flow, four quarters	$60.5M
Months of runway	not finite
Days since last periodic filing	2 (10-Q received Nov 3, 2026)
Median daily dollar volume, 63 sessions	$12.0M

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	$451.6M	2026-01-03	2026-02-24	10-K	26-011136
2	assets	us-gaap:Assets	$1.5B	2026-01-03	2026-02-24	10-K	26-011136
3	operating income	us-gaap:OperatingIncomeLoss	$32.5M	2026-01-03	2026-02-24	10-K	26-011136
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$129,000	2026-01-03	2026-02-24	10-K	26-011136
5	income tax	us-gaap:IncomeTaxExpenseBenefit	-$90,000	2026-01-03	2026-02-24	10-K	26-011136
6	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$595.6M	2026-01-03	2026-02-24	10-K	26-011136
7	book equity	us-gaap:StockholdersEquity	$617.3M	2026-01-03	2026-02-24	10-K	26-011136
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$385.8M	2026-01-03	2026-02-24	10-K	26-011136
9	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$575.1M	2024-12-28	2026-02-24	10-K	26-011136
10	book equity	us-gaap:StockholdersEquity	$646.4M	2024-12-28	2026-02-24	10-K	26-011136
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$505.6M	2024-12-28	2026-02-24	10-K	26-011136
12	net income	us-gaap:NetIncomeLoss	$219,000	2026-01-03	2026-02-24	10-K	26-011136
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$59.8M	2026-01-03	2026-02-24	10-K	26-011136
14	assets	us-gaap:Assets	$1.6B	2024-12-28	2026-02-24	10-K	26-011136
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$3.0B	2026-01-03	2026-02-24	10-K	26-011136
16	gross profit	us-gaap:GrossProfit	$489.1M	2024-12-28	2026-02-24	10-K	26-011136
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$3.0B	2024-12-28	2026-02-24	10-K	26-011136
18	gross profit	us-gaap:GrossProfit	$527.0M	2023-12-30	2026-02-24	10-K	26-011136
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$3.1B	2023-12-30	2026-02-24	10-K	26-011136
20	gross profit	us-gaap:GrossProfit	$833.0M	2022-12-31	2025-02-18	10-K	25-000012
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.5B	2022-12-31	2025-02-18	10-K	25-000012
22	gross profit	us-gaap:GrossProfit	$778.4M	2022-01-01	2024-02-20	10-K	24-000009
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.3B	2022-01-01	2024-02-20	10-K	24-000009
24	current assets	us-gaap:AssetsCurrent	$984.5M	2026-01-03	2026-02-24	10-K	26-011136
25	current liabilities	us-gaap:LiabilitiesCurrent	$211.3M	2026-01-03	2026-02-24	10-K	26-011136
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$522.5M	2026-01-03	2026-02-24	10-K	26-011136
27	liabilities	us-gaap:Liabilities	$932.0M	2026-01-03	2026-02-24	10-K	26-011136

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28	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$39.9M	2026-01-03	2026-02-24	10-K	26-011136
29	operating income	us-gaap:OperatingIncomeLoss	$138.4M	2023-12-30	2026-02-24	10-K	26-011136
30	interest expense	us-gaap:InterestExpense	$23.7M	2023-12-30	2024-02-20	10-K	24-000009
31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$26.9M	2026-01-03	2026-02-24	10-K	26-011136
32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$85.2M	2024-12-28	2026-02-24	10-K	26-011136
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$40.1M	2024-12-28	2026-02-24	10-K	26-011136
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$306.3M	2023-12-30	2026-02-24	10-K	26-011136
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$27.5M	2023-12-30	2026-02-24	10-K	26-011136
36	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$400.3M	2022-12-31	2025-02-18	10-K	25-000012
37	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$35.9M	2022-12-31	2025-02-18	10-K	25-000012
38	current assets	us-gaap:AssetsCurrent	$1.1B	2024-12-28	2026-02-24	10-K	26-011136
39	current liabilities	us-gaap:LiabilitiesCurrent	$233.7M	2024-12-28	2026-02-24	10-K	26-011136
40	assets	us-gaap:Assets	$1.5B	2023-12-30	2025-02-18	10-K	25-000012
41	assets	us-gaap:Assets	$1.5B	2022-12-31	2024-02-20	10-K	24-000009
42	shares outstanding	dei:EntityCommonStockSharesOutstanding	7,866,824	2026-02-20	2026-02-24	10-K	26-011136
43	shares outstanding	dei:EntityCommonStockSharesOutstanding	8,294,928	2025-02-14	2025-02-18	10-K	25-000012

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