W.W. Grainger, Inc.

GWW

NYSE; shops; SIC 5000, Wholesale-Durable Goods; CIK 0000277135

A

strongest fifth of 254 graded peers in shops

rank 16 of 254; percentile 5.9; sampling error 3.0 points; lower is stronger

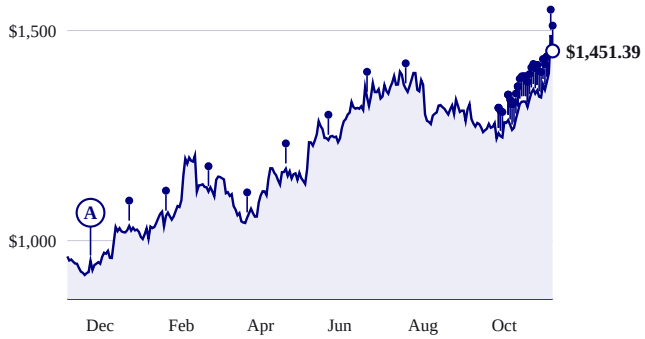
A B C D E

A, the bull



Scoreboard	
Profitability	B percentile 35.7
Solvency	B percentile 24.3
Growth and financing	B/C percentile 37.1
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 $9.0B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress
Inputs computable	11 of 14
Graded from	filings received through Feb 19, 2026 260 days before the rescan; latest periodic filing 10-Q received Nov 4, 2026
Last close	$1,452.06 2026-11-05; market equity $68.0B; 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

W.W. Grainger, Inc., incorporated in the State of Illinois in 1928, is a broad line, distributor of maintenance, repair and operating (MRO) products and services with operations primarily in North America, Japan and the United Kingdom (U.K.). In the fourth quarter of 2025, Grainger exited the U.K. market by completing the sale of the Cromwell business and closing the Zoro U.K. business. In this report, the words "Grainger" or "Company" mean W.W. Grainger, Inc. and its subsidiaries, except where the context makes it clear that the reference is only to W.W. Grainger, Inc. itself and not its subsidiaries.

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 35.7						
Gross profitability	78.2%	42.6%		13.1	238	2025-12-31
Return on invested capital	34.6%	10.9%		16.9	84	2025-12-31
Accruals ratio	(3.5%)	(4.8%)		68.1	283	2025-12-31

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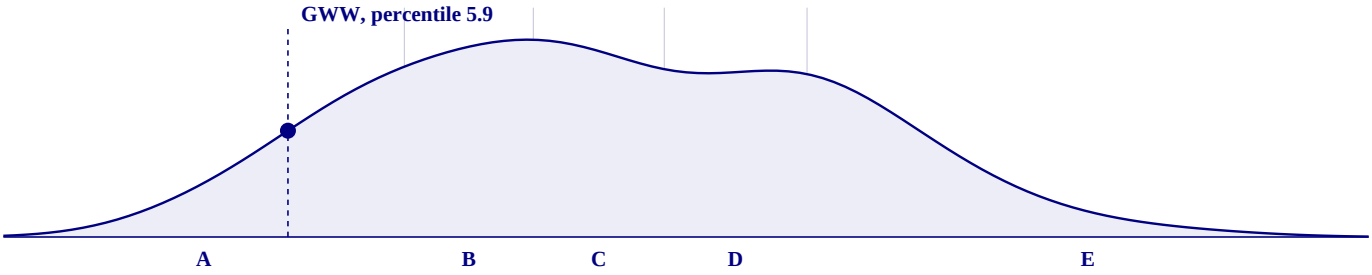
Gross margin stability, five years	1.2 pts	1.3 pts	44.7	216	2025-12-31
Solvency, sleeve percentile 24.3					
Twelve-month failure probability	not computable	0.03%			
liabilities and a nearby cover-page share count are required at 2026-09-30					
Altman Z double-prime	not computable	1.93			
one or more required annual facts are missing					
Net debt to EBITDA	0.67x	1.37x	32.7	99	2025-12-31
Interest coverage	not computable	3.83x			
latest aligned inputs end 2018-12-31; latest annual assets end 2025-12-31					
Current ratio	2.83x	1.37x	15.9	291	2025-12-31
Growth and financing, sleeve percentile 37.1					
Revenue growth, three-year compound	5.6%	1.6%	28.4	265	2025-12-31
Free cash flow growth, three-year compound	7.3%	4.6%	44.4	152	2025-12-31
Reinvestment rate	25.1%	12.2%	43.0	152	2025-12-31
Asset growth, three years	5.7%	3.4%	36.5	267	2025-12-31
Net share issuance, one year	(1.7%)	(0.6%)	33.2	209	2026-02-12

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
11	Global Industrial Co. (GIC)	4.0	A	
12	SiteOne Landscape Supply, Inc. (SITE)	4.3	A	
13	Ulta Beauty, Inc. (ULTA)	4.7	A	
14	Costco Wholesale Corp. (COST)	5.1	A	fortress balance sheet
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
18	Winmark Corp. (WINA)	6.7	A	
19	Urban Outfitters Inc. (URBN)	7.1	A	
20	Best BUY Co. Inc. (BBY)	7.5	A	fortress balance sheet
21	FirstCash Holdings, Inc. (FCFS)	7.9	A	

What the price implies

at the 2026-11-05 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	28.3%	(0.7%)	76
Distance from 52-week high	(2.6%)	(21.0%)	91
EBIT to enterprise value	3.6%	5.1%	34
Free cash flow yield	2.0%	3.8%	33
Book value to price	0.06	0.36	18
Sales to price	0.26	1.62	5
Composite equity issuance, five years	(17.3%)	(16.9%)	46

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Relative strength against the sector, log excess return	0.34	0.08	76

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	pass
Long-term leverage fell	pass
Current ratio improved	pass
No new shares issued	pass
Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$768.0M
Operating cash flow, four quarters	$2.2B
Months of runway	not finite
Days since last periodic filing	2 (10-Q received Nov 4, 2026)
Median daily dollar volume, 63 sessions	$301.9M

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	$7.0B	2025-12-31	2026-02-19	10-K	26-000011
2	assets	us-gaap:Assets	$9.0B	2025-12-31	2026-02-19	10-K	26-000011
3	operating income	us-gaap:OperatingIncomeLoss	$2.5B	2025-12-31	2026-02-19	10-K	26-000011
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$2.4B	2025-12-31	2026-02-19	10-K	26-000011
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$622.0M	2025-12-31	2026-02-19	10-K	26-000011
6	total debt	us-gaap:LongTermDebt	$2.5B	2025-12-31	2026-02-19	10-K	26-000011
7	book equity	us-gaap:StockholdersEquity	$3.7B	2025-12-31	2026-02-19	10-K	26-000011
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$585.0M	2025-12-31	2026-02-19	10-K	26-000011
9	total debt	us-gaap:LongTermDebt	$2.8B	2024-12-31	2026-02-19	10-K	26-000011
10	book equity	us-gaap:StockholdersEquity	$3.4B	2024-12-31	2026-02-19	10-K	26-000011
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$1.0B	2024-12-31	2026-02-19	10-K	26-000011
12	net income	us-gaap:NetIncomeLoss	$1.7B	2025-12-31	2026-02-19	10-K	26-000011
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$2.0B	2025-12-31	2026-02-19	10-K	26-000011
14	assets	us-gaap:Assets	$8.8B	2024-12-31	2026-02-19	10-K	26-000011
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$17.9B	2025-12-31	2026-02-19	10-K	26-000011
16	gross profit	us-gaap:GrossProfit	$6.8B	2024-12-31	2026-02-19	10-K	26-000011
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$17.2B	2024-12-31	2026-02-19	10-K	26-000011
18	gross profit	us-gaap:GrossProfit	$6.5B	2023-12-31	2026-02-19	10-K	26-000011
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$16.5B	2023-12-31	2026-02-19	10-K	26-000011
20	gross profit	us-gaap:GrossProfit	$5.8B	2022-12-31	2025-02-20	10-K	25-000010
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$15.2B	2022-12-31	2025-02-20	10-K	25-000010
22	gross profit	us-gaap:GrossProfit	$4.7B	2021-12-31	2024-02-22	10-K	24-000011
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$13.0B	2021-12-31	2024-02-22	10-K	24-000011
24	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$330.0M	2025-12-31	2026-02-19	10-K	26-000011
25	operating income	us-gaap:OperatingIncomeLoss	$1.2B	2018-12-31	2021-02-24	10-K	21-000007
26	interest expense	us-gaap:InterestExpense	$88.0M	2018-12-31	2019-02-28	10-K	19-000010
27	current assets	us-gaap:AssetsCurrent	$5.5B	2025-12-31	2026-02-19	10-K	26-000011
28	current liabilities	us-gaap:LiabilitiesCurrent	$1.9B	2025-12-31	2026-02-19	10-K	26-000011
29	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$684.0M	2025-12-31	2026-02-19	10-K	26-000011
30	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$2.1B	2024-12-31	2026-02-19	10-K	26-000011

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31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$541.0M	2024-12-31	2026-02-19	10-K	26-000011
32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$2.0B	2023-12-31	2026-02-19	10-K	26-000011
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$445.0M	2023-12-31	2026-02-19	10-K	26-000011
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$1.3B	2022-12-31	2025-02-20	10-K	25-000010
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$256.0M	2022-12-31	2025-02-20	10-K	25-000010
36	current assets	us-gaap:AssetsCurrent	$5.7B	2024-12-31	2026-02-19	10-K	26-000011
37	current liabilities	us-gaap:LiabilitiesCurrent	$2.3B	2024-12-31	2026-02-19	10-K	26-000011
38	assets	us-gaap:Assets	$8.1B	2023-12-31	2025-02-20	10-K	25-000010
39	assets	us-gaap:Assets	$7.6B	2022-12-31	2024-02-22	10-K	24-000011
40	shares outstanding	dei:EntityCommonStockSharesOutstanding	47,373,024	2026-02-12	2026-02-19	10-K	26-000011
41	shares outstanding	dei:EntityCommonStockSharesOutstanding	48,216,708	2025-02-14	2025-02-20	10-K	25-000010

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