Sherwin Williams Co.

SHW

NYSE; shops; SIC 5200, Retail-Building Materials, Hardware, Garden Supply; CIK 0000089800

D

fourth fifth of 254 graded peers in shops

rank 188 of 254; percentile 73.9; sampling error 3.0 points; lower is stronger

A B C D E

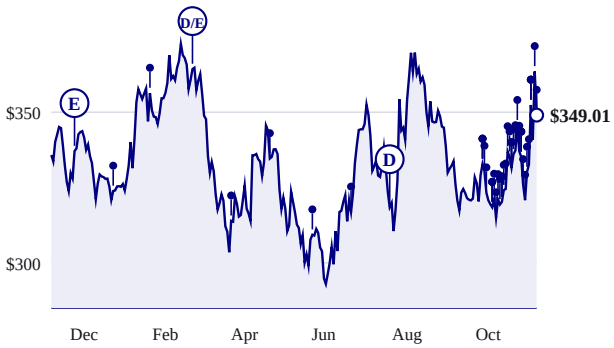
D, the sloth



Scoreboard

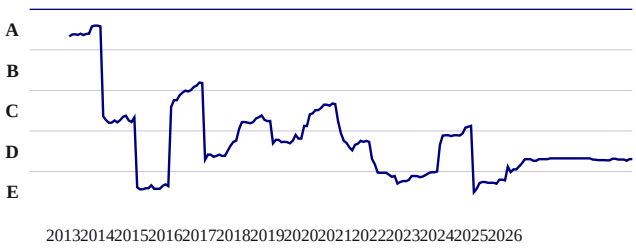
Profitability	D percentile 63.2
Solvency	D/E percentile 80.3
Growth and financing	B percentile 35.5
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $25.9B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress
Inputs computable	8 of 14
Graded from	filings received through Feb 19, 2026 260 days before the rescan; latest periodic filing 10-Q received Oct 27, 2026
Last close	$349.01 2026-11-05; market equity $84.3B; 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 Sherwin-Williams Company, founded in 1866 and incorporated in Ohio in 1884, is engaged in the development, manufacture, distribution and sale of paint, coatings and related products to professional, industrial, commercial and retail customers primarily in North and South America with additional operations in the Caribbean region, Europe, Asia and Australia. Our principal executive offices are located at 1 Sherwin Way, Cleveland, Ohio 44113-2206, telephone (216) 566-2000. As used in this report, the terms "Sherwin-Williams," "Company," "we", "us" and "our" mean The Sherwin-Williams Company and its consolidated 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 63.2						
Gross profitability	44.5%	42.6%		45.6	238	2025-12-31
Return on invested capital	not computable	10.9%				

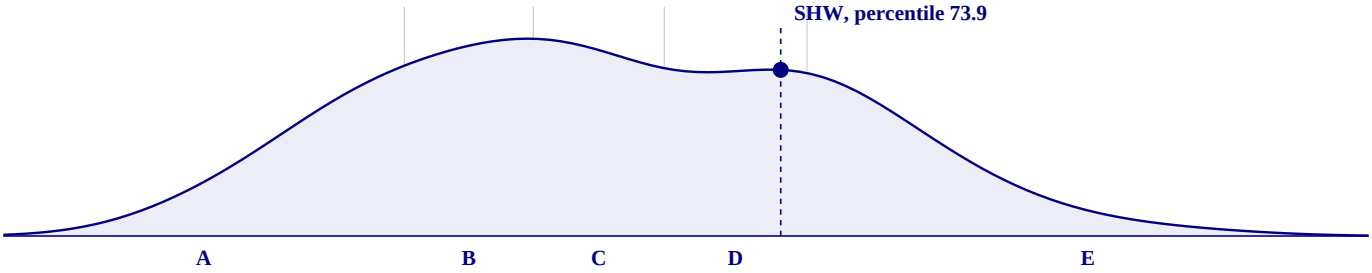
latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31

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Accruals ratio	(3.6%)	(4.8%)	66.3	283	2025-12-31
Gross margin stability, five years	2.8 pts	1.3 pts	77.7	216	2025-12-31
Solvency, sleeve percentile 80.3					
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	not computable	1.37x			
latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31					
Interest coverage	not computable	3.83x			
latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31					
Current ratio	0.87x	1.37x	80.3	291	2025-12-31
Growth and financing, sleeve percentile 35.5					
Revenue growth, three-year compound	2.1%	1.6%	47.3	265	2025-12-31
Free cash flow growth, three-year compound	27.7%	4.6%	16.6	152	2025-12-31
Reinvestment rate	not computable	12.2%			
latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31					
Asset growth, three years	4.7%	3.4%	41.0	267	2025-12-31
Net share issuance, one year	(1.4%)	(0.6%)	37.0	209	2026-01-31

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
183	Ingram Micro Holding Corp. (INGM)	71.9	D	
184	Target Corp. (TGT)	72.3	D	
185	El Pollo Loco Holdings, Inc. (LOCO)	72.7	D	
186	Willis Lease Finance Corp. (WLFC)	73.1	D	
187	Lands' END, Inc. (LE)	73.5	D	short runway
188	Sherwin Williams Co. (SHW)	73.9	D	
189	Aramark (ARMK)	74.3	D	
190	Cracker Barrel OLD Country Store, Inc. (CBRL)	74.7	D	
191	Dave & Buster's Entertainment, Inc. (PLAY)	75.1	D	
192	1 800 Flowers COM Inc. (FLWS)	75.5	D	
193	Advance Auto Parts Inc. (AAP)	75.9	D	

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	(5.4%)	(0.7%)	42
Distance from 52-week high	(6.3%)	(21.0%)	81
EBIT to enterprise value	4.5%	5.1%	43
Free cash flow yield	3.1%	3.8%	41

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Book value to price	0.05	0.36	16
Sales to price	0.28	1.62	6
Composite equity issuance, five years	(15.8%)	(16.9%)	51
Relative strength against the sector, log excess return	0.04	0.08	42

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	fail
Current ratio improved	pass
No new shares issued	pass
Gross margin improved	pass
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$264.2M
Operating cash flow, four quarters	$3.7B
Months of runway	not finite
Days since last periodic filing	10 (10-Q received Oct 27, 2026)
Median daily dollar volume, 63 sessions	$542.8M

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	gross profit	us-gaap:GrossProfit	$11.5B	2025-12-31	2026-02-19	10-K	26-000008
2	assets	us-gaap:Assets	$25.9B	2025-12-31	2026-02-19	10-K	26-000008
3	operating income	us-gaap:OperatingIncomeLoss	$4.2B	2023-12-31	2024-02-20	10-K	24-000033
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$3.1B	2023-12-31	2026-02-19	10-K	26-000008
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$721.1M	2023-12-31	2026-02-19	10-K	26-000008
6	total debt	us-gaap:LongTermDebt	$9.5B	2023-12-31	2026-02-19	10-K	26-000008
7	book equity	us-gaap:StockholdersEquity	$3.7B	2023-12-31	2026-02-19	10-K	26-000008
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$276.8M	2023-12-31	2026-02-19	10-K	26-000008
9	total debt	us-gaap:LongTermDebt	$9.6B	2022-12-31	2025-02-20	10-K	25-000030
10	book equity	us-gaap:StockholdersEquity	$3.1B	2022-12-31	2026-02-19	10-K	26-000008
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$198.8M	2022-12-31	2025-02-20	10-K	25-000030
12	net income	us-gaap:NetIncomeLoss	$2.6B	2025-12-31	2026-02-19	10-K	26-000008
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$3.5B	2025-12-31	2026-02-19	10-K	26-000008
14	assets	us-gaap:Assets	$23.6B	2024-12-31	2026-02-19	10-K	26-000008
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$23.6B	2025-12-31	2026-02-19	10-K	26-000008
16	gross profit	us-gaap:GrossProfit	$11.2B	2024-12-31	2026-02-19	10-K	26-000008
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$23.1B	2024-12-31	2026-02-19	10-K	26-000008
18	gross profit	us-gaap:GrossProfit	$10.8B	2023-12-31	2026-02-19	10-K	26-000008
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$23.1B	2023-12-31	2026-02-19	10-K	26-000008
20	gross profit	us-gaap:GrossProfit	$9.3B	2022-12-31	2025-02-20	10-K	25-000030
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$22.1B	2022-12-31	2025-02-20	10-K	25-000030
22	gross profit	us-gaap:GrossProfit	$8.5B	2021-12-31	2024-02-20	10-K	24-000033
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$19.9B	2021-12-31	2024-02-20	10-K	24-000033
24	depreciation amortization	us-gaap:Depreciation	$292.3M	2023-12-31	2026-02-19	10-K	26-000008
25	interest expense	us-gaap:InterestExpense	$417.5M	2023-12-31	2024-02-20	10-K	24-000033
26	current assets	us-gaap:AssetsCurrent	$6.0B	2025-12-31	2026-02-19	10-K	26-000008

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27	current liabilities	us-gaap:LiabilitiesCurrent	$6.9B	2025-12-31	2026-02-19	10-K	26-000008
28	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$797.6M	2025-12-31	2026-02-19	10-K	26-000008
29	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$3.2B	2024-12-31	2026-02-19	10-K	26-000008
30	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$1.1B	2024-12-31	2026-02-19	10-K	26-000008
31	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$3.5B	2023-12-31	2026-02-19	10-K	26-000008
32	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$888.4M	2023-12-31	2026-02-19	10-K	26-000008
33	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$1.9B	2022-12-31	2025-02-20	10-K	25-000030
34	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$644.5M	2022-12-31	2025-02-20	10-K	25-000030
35	current assets	us-gaap:AssetsCurrent	$5.5B	2023-12-31	2026-02-19	10-K	26-000008
36	current liabilities	us-gaap:LiabilitiesCurrent	$6.6B	2023-12-31	2026-02-19	10-K	26-000008
37	current assets	us-gaap:AssetsCurrent	$5.9B	2022-12-31	2025-02-20	10-K	25-000030
38	current liabilities	us-gaap:LiabilitiesCurrent	$6.0B	2022-12-31	2025-02-20	10-K	25-000030
39	assets	us-gaap:Assets	$23.0B	2023-12-31	2026-02-19	10-K	26-000008
40	assets	us-gaap:Assets	$22.6B	2022-12-31	2025-02-20	10-K	25-000030
41	shares outstanding	dei:EntityCommonStockSharesOutstanding	247,774,767	2026-01-31	2026-02-19	10-K	26-000008
42	shares outstanding	dei:EntityCommonStockSharesOutstanding	251,364,135	2025-01-31	2025-02-20	10-K	25-000030

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