# Wesco International Inc.

**WCC**

NYSE; shops; SIC 5063, Wholesale-Electrical Apparatus & Equipment, Wiring Supplies ; CIK 0000929008

**B**

**second fifth of 254 graded peers in shops**

rank 60 of 254; percentile 23.3; sampling error 3.0 points; lower is stronger

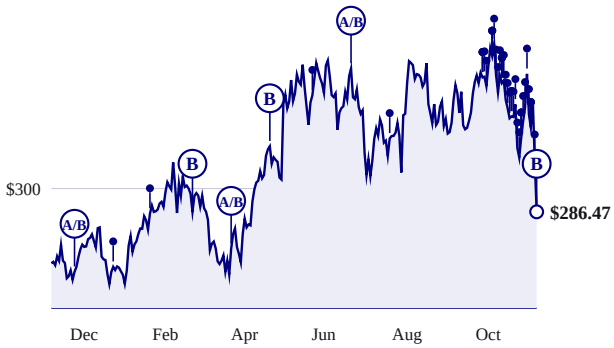
A B C D E

**B, the elk**



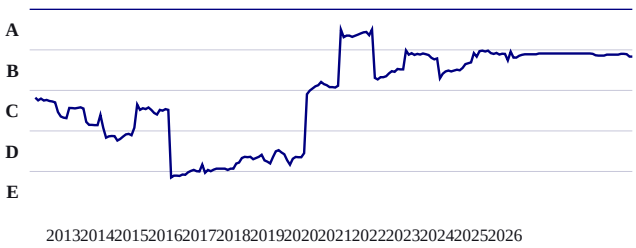
| Scoreboard | |
|---|---|
| **Profitability** | C<br>percentile 56.6 |
| **Solvency** | B<br>percentile 23.3 |
| **Growth and financing** | B/C<br>percentile 40.1 |
| **Reliability** | 0.94 AUC<br>filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025 |
| **Peer failure rate** | 0.52% a year<br>Item 1.03 bankruptcies, same asset band, 2012 to 2025 |
| **Size band** | over $2.67B assets<br>total assets $16.5B |
| **Standard universe** | inside<br>revenue above $1M and assets above $10M |
| **Warnings** | none triggered<br>not computable: short runway, distress |
| **Inputs computable** | 9 of 14 |
| **Graded from** | filings received through Feb 13, 2026<br>266 days before the rescan; latest periodic filing 10-Q received Oct 29, 2026 |
| **Last close** | $286.03<br>2026-11-05; market equity $13.9B; 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*

In this Annual Report on Form 10-K, "Wesco" refers to WESCO International, Inc., and its subsidiaries and its predecessors unless the context otherwise requires. References to "we," "us," "our" and the "Company" refer to Wesco and its subsidiaries. WESCO International, Inc. ("Wesco International") and its subsidiaries (collectively, "Wesco" or the "Company"), headquartered in Pittsburgh, Pennsylvania, is a leading provider of business-to-business distribution, logistics services and supply chain solutions. We employ approximately 21,000 people, maintain relationships with more than 35,000 suppliers, and serve nearly 130,000 customers worldwide.

## The fourteen inputs

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

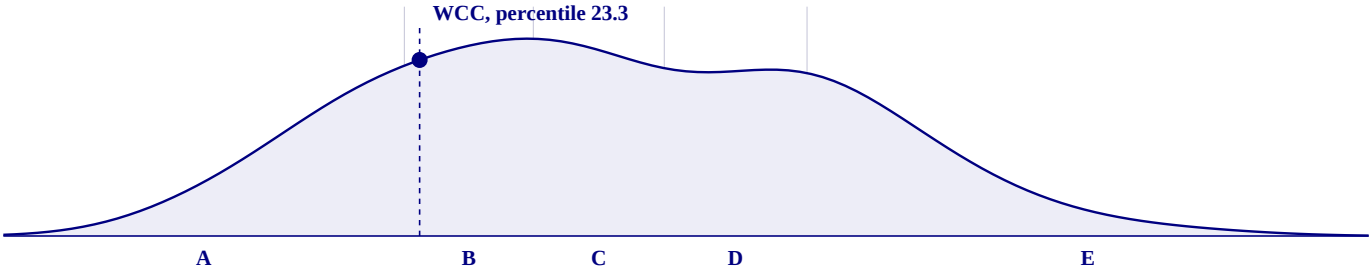
| Input | Value | Peer median | Percentile, 0 to 100 | Pct | Peers | Period end |
|---|---|---|---|---|---|---|
| **Profitability, sleeve percentile 56.6** | | | | | | |
| Gross profitability | 30.1% | 42.6% | | 68.4 | 238 | 2025-12-31 |
| Return on invested capital | not computable | 10.9% | | | | |

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.

| | | | | | | |
|---|---|---|---|---|---|---|
| *latest aligned inputs end 2018-12-31; latest annual assets end 2025-12-31* | | | | | | |
| Accruals ratio | 3.3% | (4.8%) | | 94.3 | 283 | 2025-12-31 |
| Gross margin stability, five years | 0.4 pts | 1.3 pts | | 7.0 | 216 | 2025-12-31 |
| **Solvency, sleeve percentile 23.3** | | | | | | |
| 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 | 4.10 | 1.93 | | 21.7 | 204 | 2025-12-31 |
| Net debt to EBITDA | not computable | 1.37x | | | | |
| *latest aligned inputs end 2018-12-31; latest annual assets end 2025-12-31* | | | | | | |
| Interest coverage | not computable | 3.83x | | | | |
| *latest aligned inputs end 2014-12-31; latest annual assets end 2025-12-31* | | | | | | |
| Current ratio | 2.20x | 1.37x | | 24.8 | 291 | 2025-12-31 |
| **Growth and financing, sleeve percentile 40.1** | | | | | | |
| Revenue growth, three-year compound | 3.2% | 1.6% | | 41.3 | 265 | 2025-12-31 |
| Free cash flow growth, three-year compound | not computable | 4.6% | | | | |
| *current FCF must be positive and base FCF must exceed $100,000* | | | | | | |
| Reinvestment rate | 67.8% | 12.2% | | 21.9 | 152 | 2025-12-31 |
| Asset growth, three years | 3.7% | 3.4% | | 45.9 | 267 | 2025-12-31 |
| Net share issuance, one year | (0.3%) | (0.6%) | | 51.4 | 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 |
|---|---|---|---|---|
| 55 | Buckle Inc. (BKE) | 21.3 | A/B | |
| 56 | Arhaus, Inc. (ARHS) | 21.7 | A/B | |
| 57 | EVI Industries, Inc. (EVI) | 22.1 | A/B | |
| 58 | Sprouts Farmers Market, Inc. (SFM) | 22.5 | A/B | fortress balance sheet |
| 59 | Pricesmart Inc. (PSMT) | 22.9 | A/B | fortress balance sheet |
| 60 | Wesco International Inc. (WCC) | 23.3 | B | |
| 61 | TE Connectivity plc (TEL) | 23.7 | B | |
| 62 | Carmax Inc. (KMX) | 24.1 | B | |
| 63 | Academy Sports & Outdoors, Inc. (ASO) | 24.5 | B | |
| 64 | Dillard'S, Inc. (DDS) | 25.1 | B | |
| 65 | Dillard'S, Inc. (DDT) | 25.1 | B | |

## 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 | 39.3% | (0.7%) | 81 |
| Distance from 52-week high | (25.4%) | (21.0%) | 43 |
| EBIT to enterprise value | 8.3% | 5.1% | 79 |
| Free cash flow yield | 0.2% | 3.8% | 23 |

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| | | | |
|---|---|---|---|
| Book value to price | 0.39 | 0.36 | 53 |
| Sales to price | 1.69 | 1.62 | 51 |
| Composite equity issuance, five years | (6.2%) | (16.9%) | 68 |
| Relative strength against the sector, log excess return | 0.42 | 0.08 | 81 |

## Diagnostics

*shown on every report; none enters the grade*

| Measure | Value |
|---|---|
| **Piotroski F-score 5 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 | fail |
| Long-term leverage fell | fail |
| Current ratio improved | pass |
| No new shares issued | pass |
| 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 | 8 (10-Q received Oct 29, 2026) |
| Median daily dollar volume, 63 sessions | $187.7M |

## 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:RevenueFromContractWithCustomerExcludingA... | $23.5B | 2025-12-31 | 2026-02-13 | 10-K | 26-000008 |
| 2 | cost of revenue | us-gaap:CostOfGoodsAndServicesSold | $18.5B | 2025-12-31 | 2026-02-13 | 10-K | 26-000008 |
| 3 | assets | us-gaap:Assets | $16.5B | 2025-12-31 | 2026-02-13 | 10-K | 26-000008 |
| 4 | operating income | us-gaap:OperatingIncomeLoss | $352.4M | 2018-12-31 | 2021-03-01 | 10-K | 21-000006 |
| 5 | pretax income | us-gaap:IncomeLossFromContinuingOperationsBeforeInc... | $281.0M | 2018-12-31 | 2021-03-01 | 10-K | 21-000006 |
| 6 | income tax | us-gaap:IncomeTaxExpenseBenefit | $55.7M | 2018-12-31 | 2021-03-01 | 10-K | 21-000006 |
| 7 | total debt | us-gaap:LongTermDebtAndCapitalLeaseObligations | $1.2B | 2018-12-31 | 2019-02-27 | 10-K | 19-000006 |
| 8 | book equity | us-gaap:StockholdersEquity | $2.1B | 2018-12-31 | 2020-02-24 | 10-K | 20-000013 |
| 9 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $96.3M | 2018-12-31 | 2022-02-25 | 10-K | 22-000009 |
| 10 | total debt | us-gaap:LongTermDebtAndCapitalLeaseObligations | $1.3B | 2017-12-31 | 2019-02-27 | 10-K | 19-000006 |
| 11 | book equity | us-gaap:StockholdersEquity | $2.1B | 2017-12-31 | 2019-02-27 | 10-K | 19-000006 |
| 12 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $118.0M | 2017-12-31 | 2021-03-01 | 10-K | 21-000006 |
| 13 | net income | us-gaap:NetIncomeLoss | $640.2M | 2025-12-31 | 2026-02-13 | 10-K | 26-000008 |
| 14 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $125.0M | 2025-12-31 | 2026-02-13 | 10-K | 26-000008 |
| 15 | assets | us-gaap:Assets | $15.1B | 2024-12-31 | 2026-02-13 | 10-K | 26-000008 |
| 16 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $21.8B | 2024-12-31 | 2026-02-13 | 10-K | 26-000008 |
| 17 | cost of revenue | us-gaap:CostOfGoodsAndServicesSold | $17.1B | 2024-12-31 | 2026-02-13 | 10-K | 26-000008 |
| 18 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $22.4B | 2023-12-31 | 2026-02-13 | 10-K | 26-000008 |
| 19 | cost of revenue | us-gaap:CostOfGoodsAndServicesSold | $17.5B | 2023-12-31 | 2026-02-13 | 10-K | 26-000008 |
| 20 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $21.4B | 2022-12-31 | 2025-02-14 | 10-K | 25-000005 |
| 21 | cost of revenue | us-gaap:CostOfGoodsAndServicesSold | $16.8B | 2022-12-31 | 2025-02-14 | 10-K | 25-000005 |
| 22 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $18.2B | 2021-12-31 | 2024-02-20 | 10-K | 24-000005 |
| 23 | cost of revenue | us-gaap:CostOfGoodsAndServicesSold | $14.4B | 2021-12-31 | 2024-02-20 | 10-K | 24-000005 |
| 24 | current assets | us-gaap:AssetsCurrent | $9.5B | 2025-12-31 | 2026-02-13 | 10-K | 26-000008 |
| 25 | current liabilities | us-gaap:LiabilitiesCurrent | $4.3B | 2025-12-31 | 2026-02-13 | 10-K | 26-000008 |
| 26 | retained earnings | us-gaap:RetainedEarningsAccumulatedDeficit | $5.5B | 2025-12-31 | 2026-02-13 | 10-K | 26-000008 |

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| | | | | | | | |
|---|---|---|---|---|---|---|---|
| 27 | operating income | us-gaap:OperatingIncomeLoss | $1.2B | 2025-12-31 | 2026-02-13 | 10-K | 26-000008 |
| 28 | book equity | us-gaap:StockholdersEquity | $5.0B | 2025-12-31 | 2026-02-13 | 10-K | 26-000008 |
| 29 | liabilities | us-gaap:Liabilities | $11.5B | 2025-12-31 | 2026-02-13 | 10-K | 26-000008 |
| 30 | depreciation amortization | us-gaap:Depreciation | $17.3M | 2018-12-31 | 2021-03-01 | 10-K | 21-000006 |
| 31 | operating income | us-gaap:OperatingIncomeLoss | $466.2M | 2014-12-31 | 2017-02-22 | 10-K | 17-000005 |
| 32 | interest expense | us-gaap:InterestExpense | $82.1M | 2014-12-31 | 2015-02-24 | 10-K | 15-000006 |
| 33 | capital expenditure | us-gaap:PaymentsToAcquireProductiveAssets | $99.8M | 2025-12-31 | 2026-02-13 | 10-K | 26-000008 |
| 34 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $1.1B | 2024-12-31 | 2026-02-13 | 10-K | 26-000008 |
| 35 | capital expenditure | us-gaap:PaymentsToAcquireProductiveAssets | $94.7M | 2024-12-31 | 2026-02-13 | 10-K | 26-000008 |
| 36 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $493.2M | 2023-12-31 | 2026-02-13 | 10-K | 26-000008 |
| 37 | capital expenditure | us-gaap:PaymentsToAcquireProductiveAssets | $92.3M | 2023-12-31 | 2026-02-13 | 10-K | 26-000008 |
| 38 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $11.0M | 2022-12-31 | 2025-02-14 | 10-K | 25-000005 |
| 39 | capital expenditure | us-gaap:PaymentsToAcquireProductiveAssets | $99.4M | 2022-12-31 | 2025-02-14 | 10-K | 25-000005 |
| 40 | depreciation amortization | us-gaap:Depreciation | $83.9M | 2025-12-31 | 2026-02-13 | 10-K | 26-000008 |
| 41 | pretax income | us-gaap:IncomeLossFromContinuingOperationsBeforeInc... | $855.9M | 2025-12-31 | 2026-02-13 | 10-K | 26-000008 |
| 42 | income tax | us-gaap:IncomeTaxExpenseBenefit | $213.4M | 2025-12-31 | 2026-02-13 | 10-K | 26-000008 |
| 43 | current assets | us-gaap:AssetsCurrent | $8.4B | 2024-12-31 | 2026-02-13 | 10-K | 26-000008 |
| 44 | current liabilities | us-gaap:LiabilitiesCurrent | $3.8B | 2024-12-31 | 2026-02-13 | 10-K | 26-000008 |
| 45 | assets | us-gaap:Assets | $15.1B | 2023-12-31 | 2025-02-14 | 10-K | 25-000005 |
| 46 | assets | us-gaap:Assets | $14.8B | 2022-12-31 | 2024-02-20 | 10-K | 24-000005 |
| 47 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 48,661,915 | 2026-02-12 | 2026-02-13 | 10-K | 26-000008 |
| 48 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 48,795,929 | 2025-02-13 | 2025-02-14 | 10-K | 25-000005 |

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