O Reilly Automotive Inc.

ORLY

Nasdaq; shops; SIC 5531, Retail-Auto & Home Supply Stores; CIK 0000898173

D

fourth fifth of 254 graded peers in shops

rank 168 of 254; percentile 66.0; sampling error 3.0 points; lower is stronger

A B C D E

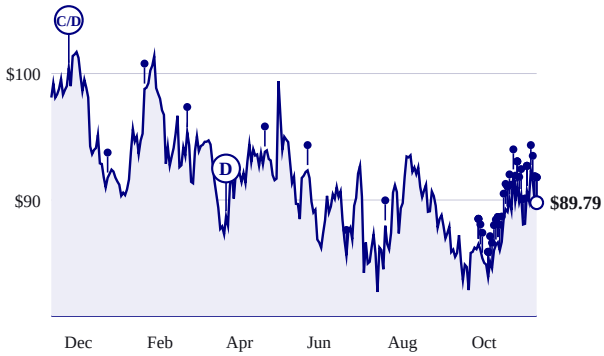
D, the sloth



Scoreboard

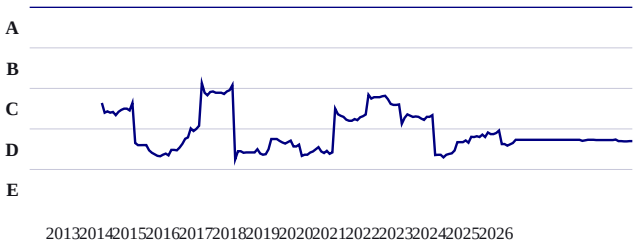
Profitability	C	percentile 43.7
Solvency	E	percentile 85.0
Growth and financing	B/C	percentile 38.2
Reliability	0.94 AUC	filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year	Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets	total assets $16.5B
Standard universe	inside	revenue above $1M and assets above $10M
Warnings	none triggered	not computable: distress
Inputs computable	9 of 14	
Graded from	filings received through Feb 27, 2026	256 days before the rescan; latest periodic filing 10-Q received Nov 6, 2026
Last close	$89.81	2026-11-09; market equity $72.0B; 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 27, 2026

Unless otherwise indicated, "we," "us," "our," and similar terms, as well as references to the "Company," refer to O'Reilly Automotive, Inc. and its Subsidiaries. O'Reilly is one of the largest specialty retailers of automotive aftermarket parts, tools, supplies, equipment, and accessories across North America, selling our products to both do-it-yourself ("DIY") and professional service provider customers, our "dual market strategy." The business was founded in 1957 by Charles F. O'Reilly and his son, Charles H. "Chub" O'Reilly, Sr., and initially operated from a single store in Springfield, Missouri.

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 43.7						
Gross profitability	55.5%	42.0%		27.8	238	2025-12-31
Return on invested capital	not computable	10.9%				

latest aligned inputs end 2016-12-31; latest annual assets end 2025-12-31

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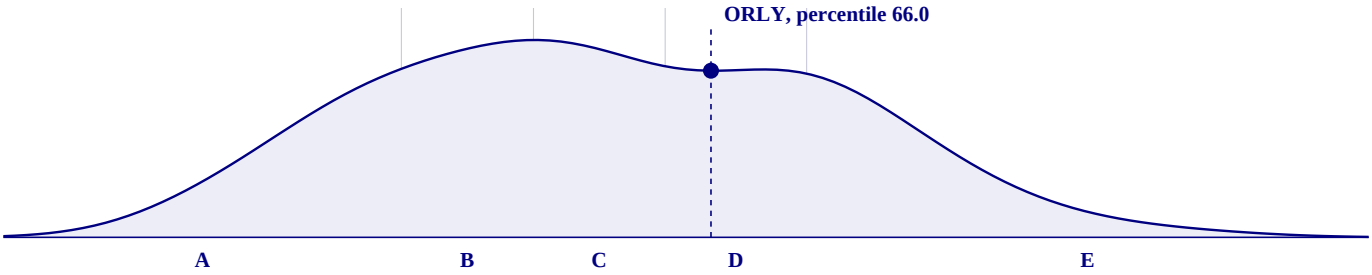
Accruals ratio	(1.4%)	(4.9%)	84.0	283	2025-12-31
Gross margin stability, five years	0.6 pts	1.3 pts	19.1	216	2025-12-31
Solvency, sleeve percentile 85.0					
Twelve-month failure probability	not computable	0.03%			
liabilities and a nearby cover-page share count are required at 2026-09-30					
Altman Z double-prime	not computable	1.93			
one or more required annual facts are missing					
Net debt to EBITDA	not computable	1.38x			
latest aligned inputs end 2016-12-31; latest annual assets end 2025-12-31					
Interest coverage	not computable	3.27x			
one or more required annual facts are missing					
Current ratio	0.77x	1.37x	85.0	295	2025-12-31
Growth and financing, sleeve percentile 38.2					
Revenue growth, three-year compound	7.3%	1.6%	23.1	265	2025-12-31
Free cash flow growth, three-year compound	(14.9%)	4.6%	79.3	151	2025-12-31
Reinvestment rate	39.5%	17.6%	37.3	151	2025-12-31
Asset growth, three years	9.4%	3.4%	21.4	267	2025-12-31
Net share issuance, one year	(2.4%)	(0.6%)	29.8	209	2026-02-23

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
163	Marinemax Inc. (HZO)	64.0	D	
164	1stdibs.com, Inc. (DIBS)	64.4	D	
165	CarParts.com, Inc. (PRTS)	64.8	D	
166	Duluth Holdings Inc. (DLTH)	65.2	D	
167	A.K.A. Brands Holding Corp. (AKA)	65.6	D	
168	O Reilly Automotive Inc. (ORLY)	66.0	D	
169	World Kinect Corp. (WKC)	66.4	D	
170	Star Group, L.P. (SGU)	66.8	D	
171	Aspen Aerogels Inc. (ASPN)	67.2	D	fortress balance sheet
172	AerSale Corp. (ASLE)	67.6	D	short runway, fortress balance sheet
173	Vince Holding Corp. (VNCE)	68.0	D	

What the price implies

at the 2026-11-09 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(9.6%)	(0.8%)	40
Distance from 52-week high	(11.7%)	(19.6%)	67
EBIT to enterprise value	4.6%	5.1%	44
Free cash flow yield	2.2%	3.8%	35
Book value to price	(0.03)	0.35	13

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Sales to price	0.25	1.55	4
Composite equity issuance, five years	(27.2%)	(16.9%)	28
Relative strength against the sector, log excess return	(0.01)	0.08	40

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 7 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	pass
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$194.4M
Operating cash flow, four quarters	$3.2B
Months of runway	not finite
Days since last periodic filing	4 (10-Q received Nov 6, 2026)
Median daily dollar volume, 63 sessions	$446.8M

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	$9.2B	2025-12-31	2026-02-27	10-K	26-000009
2	assets	us-gaap:Assets	$16.5B	2025-12-31	2026-02-27	10-K	26-000009
3	operating income	us-gaap:OperatingIncomeLoss	$1.7B	2016-12-31	2019-02-27	10-K	19-000060
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$1.6B	2016-12-31	2019-02-27	10-K	19-000060
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$599.5M	2016-12-31	2019-02-27	10-K	19-000060
6	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$1.9B	2016-12-31	2017-02-28	10-K	17-000091
7	book equity	us-gaap:StockholdersEquity	$1.6B	2016-12-31	2020-02-28	10-K	20-000007
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$146.6M	2016-12-31	2019-02-27	10-K	19-000060
9	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$1.4B	2015-12-31	2017-02-28	10-K	17-000091
10	book equity	us-gaap:StockholdersEquity	$2.0B	2015-12-31	2019-02-27	10-K	19-000060
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$116.3M	2015-12-31	2019-02-27	10-K	19-000060
12	net income	us-gaap:NetIncomeLoss	$2.5B	2025-12-31	2026-02-27	10-K	26-000009
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$2.8B	2025-12-31	2026-02-27	10-K	26-000009
14	assets	us-gaap:Assets	$14.9B	2024-12-31	2026-02-27	10-K	26-000009
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$17.8B	2025-12-31	2026-02-27	10-K	26-000009
16	gross profit	us-gaap:GrossProfit	$8.6B	2024-12-31	2026-02-27	10-K	26-000009
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$16.7B	2024-12-31	2026-02-27	10-K	26-000009
18	gross profit	us-gaap:GrossProfit	$8.1B	2023-12-31	2026-02-27	10-K	26-000009
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$15.8B	2023-12-31	2026-02-27	10-K	26-000009
20	gross profit	us-gaap:GrossProfit	$7.4B	2022-12-31	2025-02-28	10-K	25-000008
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$14.4B	2022-12-31	2025-02-28	10-K	25-000008
22	gross profit	us-gaap:GrossProfit	$7.0B	2021-12-31	2024-02-28	10-K	24-000009
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$13.3B	2021-12-31	2024-02-28	10-K	24-000009
24	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$217.9M	2016-12-31	2019-02-27	10-K	19-000060
25	current assets	us-gaap:AssetsCurrent	$6.7B	2025-12-31	2026-02-27	10-K	26-000009
26	current liabilities	us-gaap:LiabilitiesCurrent	$8.8B	2025-12-31	2026-02-27	10-K	26-000009
27	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$1.2B	2025-12-31	2026-02-27	10-K	26-000009

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28	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$3.0B	2024-12-31	2026-02-27	10-K	26-000009
29	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$1.0B	2024-12-31	2026-02-27	10-K	26-000009
30	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$3.0B	2023-12-31	2026-02-27	10-K	26-000009
31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$1.0B	2023-12-31	2026-02-27	10-K	26-000009
32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$3.1B	2022-12-31	2025-02-28	10-K	25-000008
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$563.3M	2022-12-31	2025-02-28	10-K	25-000008
34	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$511.2M	2025-12-31	2026-02-27	10-K	26-000009
35	operating income	us-gaap:OperatingIncomeLoss	$3.5B	2025-12-31	2026-02-27	10-K	26-000009
36	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$3.2B	2025-12-31	2026-02-27	10-K	26-000009
37	income tax	us-gaap:IncomeTaxExpenseBenefit	$702.0M	2025-12-31	2026-02-27	10-K	26-000009
38	current assets	us-gaap:AssetsCurrent	$5.8B	2024-12-31	2026-02-27	10-K	26-000009
39	current liabilities	us-gaap:LiabilitiesCurrent	$8.3B	2024-12-31	2026-02-27	10-K	26-000009
40	assets	us-gaap:Assets	$13.9B	2023-12-31	2025-02-28	10-K	25-000008
41	assets	us-gaap:Assets	$12.6B	2022-12-31	2024-02-28	10-K	24-000009
42	shares outstanding	dei:EntityCommonStockSharesOutstanding	838,487,034	2026-02-23	2026-02-27	10-K	26-000009
43	shares outstanding	dei:EntityCommonStockSharesOutstanding	57,272,442	2025-02-24	2025-02-28	10-K	25-000008

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