# CarParts.com, Inc.

**PRTS**

Nasdaq; shops; SIC 5531, Retail-Auto & Home Supply Stores; CIK 0001378950

**D**

## fourth fifth of 254 graded peers in shops

rank 166 of 254; percentile 65.2; sampling error 3.0 points; lower is stronger

A B C D E

**D, the sloth**



### Scoreboard

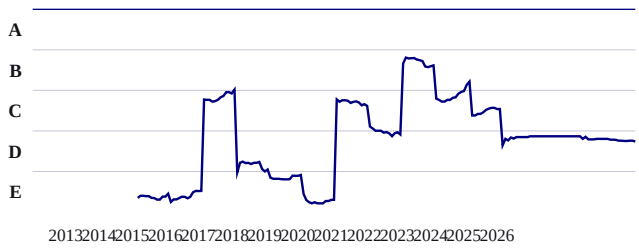
| | |
|---|---|
| **Profitability** | A/B<br>percentile 21.3 |
| **Solvency** | C/D<br>percentile 61.1 |
| **Growth and financing** | E<br>percentile 84.8 |
| **Reliability** | 0.87 AUC<br>filers with $120M to $591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025 |
| **Peer failure rate** | 1.03% a year<br>Item 1.03 bankruptcies, same asset band, 2012 to 2025 |
| **Size band** | $120M to $591M assets<br>total assets $184.9M |
| **Standard universe** | inside<br>revenue above $1M and assets above $10M |
| **Warnings** | none triggered<br>not computable: short runway, distress, fortress balance sheet |
| **Inputs computable** | 8 of 14 |
| **Graded from** | filings received through Mar 5, 2026<br>251 days before the rescan; latest periodic filing 10-Q received Oct 30, 2026 |
| **Last close** | $8.00<br>2026-11-09; market equity $64.7M; 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 Mar 5, 2026*

CarParts.com, Inc. is a technology-enabled eCommerce company dedicated to simplifying how drivers and professional customers shop for aftermarket automotive parts and accessories. With over 30 years of operating history, CarParts.com serves as a one-stop destination for vehicle repair, upgrade, and maintenance needs, delivering a seamless digital shopping experience guided by its mission of "Empowering Drivers Along Their Journey.

## The fourteen inputs

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

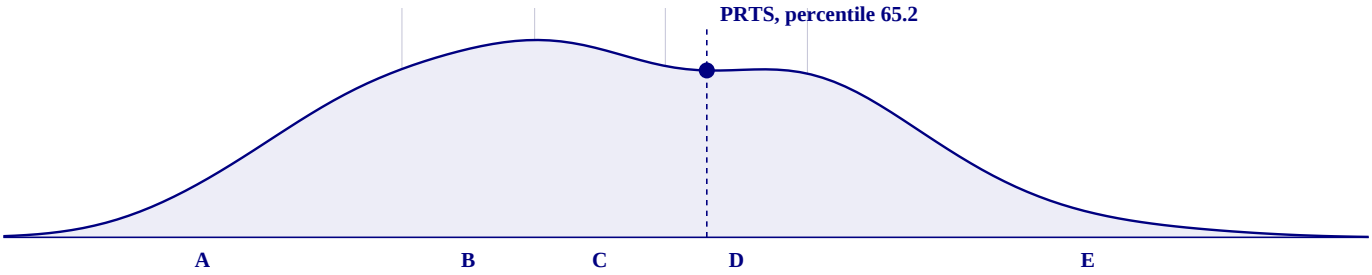
| Input | Value | Peer median | Percentile, 0 to 100 | Pct | Peers | Period end |
|---|---|---|---|---|---|---|
| **Profitability, sleeve percentile 21.3** | | | | | | |
| Gross profitability | 97.0% | 42.0% | | 7.2 | 238 | 2026-01-03 |
| Return on invested capital | not computable | 10.9% | | | | |
| *one or more required annual facts are missing* | | | | | | |
| Accruals ratio | (8.3%) | (4.9%) | | 29.8 | 283 | 2026-01-03 |

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| | | | | | | |
|---|---|---|---|---|---|---|
| Gross margin stability, five years | 0.7 pts | 1.3 pts | | 27.0 | 216 | 2026-01-03 |
| **Solvency, sleeve percentile 61.1** | | | | | | |
| 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 | (4.38) | 1.93 | | 84.7 | 204 | 2026-01-03 |
| Net debt to EBITDA | not computable | 1.38x | | | | |
| *one or more required annual facts are missing* | | | | | | |
| Interest coverage | not computable | 2.71x | | | | |
| *latest aligned inputs end 2023-12-30; latest annual assets end 2026-01-03* | | | | | | |
| Current ratio | 1.66x | 1.37x | | 37.4 | 295 | 2026-01-03 |
| **Growth and financing, sleeve percentile 84.8** | | | | | | |
| Revenue growth, three-year compound | (6.1%) | 1.6% | | 79.9 | 265 | 2026-01-03 |
| 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 | not computable | 17.6% | | | | |
| *pretax income must exceed the validity floor and imply a 0%-100% tax rate* | | | | | | |
| Asset growth, three years | (8.1%) | 3.1% | | 83.1 | 267 | 2026-01-03 |
| Net share issuance, one year | 20.9% | (0.6%) | | 91.3 | 209 | 2026-02-26 |

## 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 |
|---|---|---|---|---|
| 161 | NU Skin Enterprises, Inc. (NUS) | 63.2 | D | fortress balance sheet |
| 162 | Mcdonalds Corp. (MCD) | 63.6 | D | |
| 163 | Marinemax Inc. (HZO) | 64.0 | D | |
| 164 | 1stdibs.com, Inc. (DIBS) | 64.4 | D | |
| 165 | Duluth Holdings Inc. (DLTH) | 64.8 | D | |
| 166 | CarParts.com, Inc. (PRTS) | 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 | Aspen Aerogels Inc. (ASPN) | 66.8 | D | fortress balance sheet |
| 171 | AerSale Corp. (ASLE) | 67.2 | D | short runway, fortress balance sheet |

## 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 | 16.2% | (0.8%) | 67 |
| Distance from 52-week high | (16.5%) | (19.8%) | 57 |
| EBIT to enterprise value | not computable | 5.1% | |
| Free cash flow yield | (62.2%) | 3.8% | 5 |
| Book value to price | 0.79 | 0.35 | 76 |

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| | | | |
|---|---|---|---|
| Sales to price | 8.11 | 1.55 | 90 |
| Composite equity issuance, five years | 52.0% | (16.9%) | 94 |
| Relative strength against the sector, log excess return | 0.24 | 0.08 | 67 |

## Diagnostics

*shown on every report; none enters the grade*

| Measure | Value |
|---|---|
| **Piotroski F-score None of 9, period end 2026-01-03** | |
| Return on assets above zero | fail |
| Operating cash flow above zero | fail |
| 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 | fail |
| 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 | 12 (10-Q received Oct 30, 2026) |
| Median daily dollar volume, 63 sessions | $275,297 |

## 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 | $179.3M | 2026-01-03 | 2026-03-05 | 10-K | 26-000035 |
| 2 | assets | us-gaap:Assets | $184.9M | 2026-01-03 | 2026-03-05 | 10-K | 26-000035 |
| 3 | net income | us-gaap:NetIncomeLoss | -$50.4M | 2026-01-03 | 2026-03-05 | 10-K | 26-000035 |
| 4 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | -$34.1M | 2026-01-03 | 2026-03-05 | 10-K | 26-000035 |
| 5 | assets | us-gaap:Assets | $210.6M | 2024-12-28 | 2026-03-05 | 10-K | 26-000035 |
| 6 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $547.5M | 2026-01-03 | 2026-03-05 | 10-K | 26-000035 |
| 7 | gross profit | us-gaap:GrossProfit | $196.7M | 2024-12-28 | 2026-03-05 | 10-K | 26-000035 |
| 8 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $588.8M | 2024-12-28 | 2026-03-05 | 10-K | 26-000035 |
| 9 | gross profit | us-gaap:GrossProfit | $229.4M | 2023-12-30 | 2025-03-26 | 10-K | 25-000036 |
| 10 | revenue | us-gaap:RevenueFromContractWithCustomerIncludingAs... | $675.7M | 2023-12-30 | 2024-03-08 | 10-K | 24-000034 |
| 11 | gross profit | us-gaap:GrossProfit | $230.9M | 2022-12-31 | 2024-03-08 | 10-K | 24-000034 |
| 12 | revenue | us-gaap:RevenueFromContractWithCustomerIncludingAs... | $661.6M | 2022-12-31 | 2024-03-08 | 10-K | 24-000034 |
| 13 | gross profit | us-gaap:GrossProfit | $197.3M | 2022-01-01 | 2024-03-08 | 10-K | 24-000034 |
| 14 | revenue | us-gaap:RevenueFromContractWithCustomerIncludingAs... | $582.4M | 2022-01-01 | 2024-03-08 | 10-K | 24-000034 |
| 15 | current assets | us-gaap:AssetsCurrent | $135.1M | 2026-01-03 | 2026-03-05 | 10-K | 26-000035 |
| 16 | current liabilities | us-gaap:LiabilitiesCurrent | $81.2M | 2026-01-03 | 2026-03-05 | 10-K | 26-000035 |
| 17 | retained earnings | us-gaap:RetainedEarningsAccumulatedDeficit | -$280.0M | 2026-01-03 | 2026-03-05 | 10-K | 26-000035 |
| 18 | operating income | us-gaap:OperatingIncomeLoss | -$48.9M | 2026-01-03 | 2026-03-05 | 10-K | 26-000035 |
| 19 | book equity | us-gaap:StockholdersEquity | $53.5M | 2026-01-03 | 2026-03-05 | 10-K | 26-000035 |
| 20 | liabilities | us-gaap:Liabilities | $131.4M | 2026-01-03 | 2026-03-05 | 10-K | 26-000035 |
| 21 | operating income | us-gaap:OperatingIncomeLoss | -$9.9M | 2023-12-30 | 2025-03-26 | 10-K | 25-000036 |
| 22 | interest expense | us-gaap:InterestExpense | $1.4M | 2023-12-30 | 2024-03-08 | 10-K | 24-000034 |
| 23 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $8.0M | 2026-01-03 | 2026-03-05 | 10-K | 26-000035 |
| 24 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $10.3M | 2024-12-28 | 2026-03-05 | 10-K | 26-000035 |
| 25 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $20.6M | 2024-12-28 | 2026-03-05 | 10-K | 26-000035 |
| 26 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $50.0M | 2023-12-30 | 2025-03-26 | 10-K | 25-000036 |
| 27 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $11.9M | 2023-12-30 | 2025-03-26 | 10-K | 25-000036 |

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| | | | | | | | |
|---|---|---|---|---|---|---|---|
| 28 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $15.4M | 2022-12-31 | 2024-03-08 | 10-K | 24-000034 |
| 29 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $12.6M | 2022-12-31 | 2024-03-08 | 10-K | 24-000034 |
| 30 | depreciation amortization | us-gaap:Depreciation | $20.6M | 2026-01-03 | 2026-03-05 | 10-K | 26-000035 |
| 31 | pretax income | us-gaap:IncomeLossFromContinuingOperationsBeforeInc... | -$50.1M | 2026-01-03 | 2026-03-05 | 10-K | 26-000035 |
| 32 | income tax | us-gaap:IncomeTaxExpenseBenefit | $362,000 | 2026-01-03 | 2026-03-05 | 10-K | 26-000035 |
| 33 | current assets | us-gaap:AssetsCurrent | $138.9M | 2024-12-28 | 2026-03-05 | 10-K | 26-000035 |
| 34 | current liabilities | us-gaap:LiabilitiesCurrent | $90.4M | 2024-12-28 | 2026-03-05 | 10-K | 26-000035 |
| 35 | assets | us-gaap:Assets | $257.9M | 2023-12-30 | 2025-03-26 | 10-K | 25-000036 |
| 36 | assets | us-gaap:Assets | $238.4M | 2022-12-31 | 2024-03-08 | 10-K | 24-000034 |
| 37 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 70,477,662 | 2026-02-26 | 2026-03-05 | 10-K | 26-000035 |
| 38 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 58,295,060 | 2025-03-18 | 2025-03-26 | 10-K | 25-000036 |

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