SiteOne Landscape Supply, Inc.

SITE

NYSE; shops; SIC 5040, Wholesale-Professional & Commercial Equipment & Supplies; CIK 0001650729

A

strongest fifth of 254 graded peers in shops

rank 12 of 254; percentile 4.3; sampling error 3.0 points; lower is stronger

A B C D E

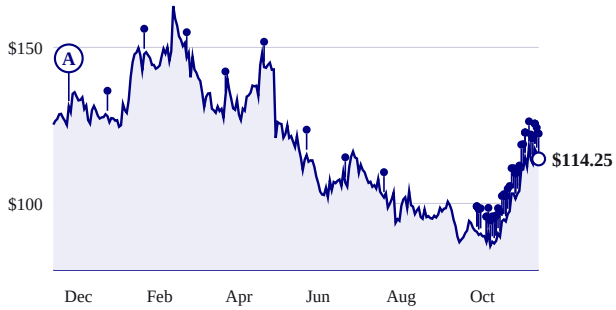
A, the bull



Scoreboard

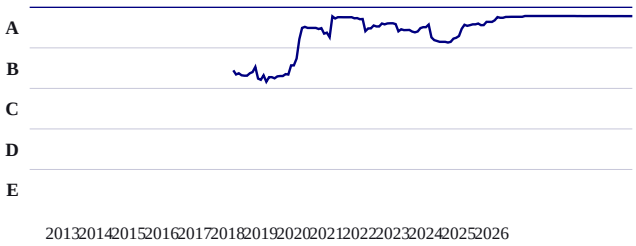
Profitability	B/C percentile 37.1
Solvency	A/B percentile 18.2
Growth and financing	B percentile 34.0
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $3.2B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress
Inputs computable	10 of 14
Graded from	filings received through Feb 19, 2026 266 days before the rescan; latest periodic filing 10-Q received Oct 28, 2026
Last close	$114.30 2026-11-11; market equity $4.9B; 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 19, 2026

The following discussion of our business contains "forward-looking statements," as discussed in "Special Note Regarding Forward-Looking Statements and Information" above. Our business, operations, and financial condition are subject to various risks as set forth in Part I,

The fourteen inputs

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

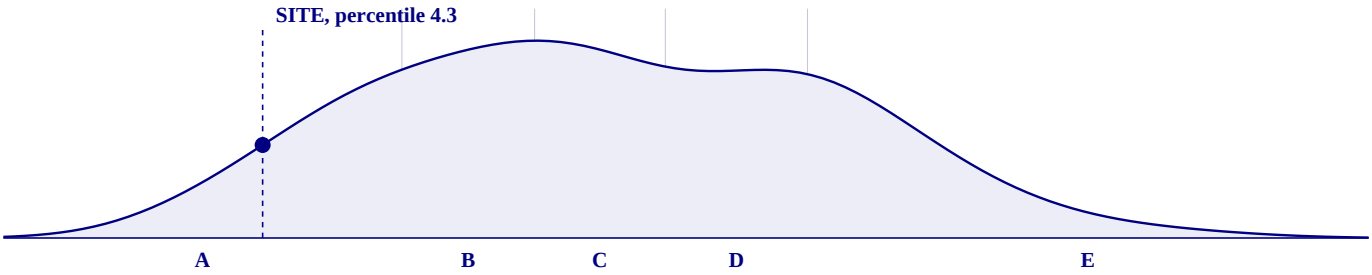
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 37.1						
Gross profitability	50.8%	42.0%		35.4	238	2025-12-28
Return on invested capital	10.0%	10.9%		52.4	83	2025-12-28
Accruals ratio	(4.7%)	(4.9%)		54.6	283	2025-12-28
Gross margin stability, five years	0.3 pts	1.3 pts		6.0	216	2025-12-28
Solvency, sleeve percentile 18.2						

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.

Twelve-month failure probability	not computable	0.03%				
four consecutive discrete net-income quarters are required; found 4						
Altman Z double-prime	4.90	1.93		16.3	204	2025-12-28
Net debt to EBITDA	not computable	1.38x				
latest aligned inputs end 2018-12-30; latest annual assets end 2025-12-28						
Interest coverage	not computable	2.71x				
latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-28						
Current ratio	2.47x	1.37x		20.1	295	2025-12-28
Growth and financing, sleeve percentile 34.0						
Revenue growth, three-year compound	5.4%	1.6%		29.5	265	2025-12-28
Free cash flow growth, three-year compound	9.1%	4.6%		41.3	151	2025-12-28
Reinvestment rate	not computable	17.6%				
latest aligned inputs end 2018-12-30; latest annual assets end 2025-12-28						
Asset growth, three years	8.3%	3.1%		25.6	267	2025-12-28
Net share issuance, one year	(1.1%)	(0.6%)		39.4	209	2026-02-13

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
7	Brinker International, Inc. (EAT)	2.4	A	
8	DXP Enterprises Inc. (DXPE)	2.8	A	
9	Fastenal Co. (FAST)	3.2	A	fortress balance sheet
10	Ross Stores, Inc. (ROST)	3.6	A	fortress balance sheet
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	Chipotle Mexican Grill Inc. (CMG)	5.9	A	fortress balance sheet
17	Rave Restaurant Group, Inc. (RAVE)	6.3	A	

What the price implies

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

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(30.4%)	(0.8%)	22
Distance from 52-week high	(30.0%)	(18.8%)	35
EBIT to enterprise value	4.5%	5.1%	42
Free cash flow yield	5.0%	3.7%	61
Book value to price	0.34	0.34	50
Sales to price	0.95	1.53	36
Composite equity issuance, five years	(2.8%)	(16.9%)	75
Relative strength against the sector, log excess return	(0.27)	0.08	22

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.

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 8 of 9, period end 2025-12-28	
Return on assets above zero	pass
Operating cash flow above zero	pass
Return on assets improved	pass
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	$88.4M
Operating cash flow, four quarters	$321.5M
Months of runway	not finite
Days since last periodic filing	15 (10-Q received Oct 28, 2026)
Median daily dollar volume, 63 sessions	$85.7M

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	gross profit	us-gaap:GrossProfit	$1.6B	2025-12-28	2026-02-19	10-K	26-000005
2	assets	us-gaap:Assets	$3.2B	2025-12-28	2026-02-19	10-K	26-000005
3	operating income	us-gaap:OperatingIncomeLoss	$238.1M	2025-12-28	2026-02-19	10-K	26-000005
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$203.1M	2025-12-28	2026-02-19	10-K	26-000005
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$45.7M	2025-12-28	2026-02-19	10-K	26-000005
6	total debt	us-gaap:LongTermDebt	$385.4M	2025-12-28	2026-02-19	10-K	26-000005
7	book equity	us-gaap:StockholdersEquity	$1.7B	2025-12-28	2026-02-19	10-K	26-000005
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$190.6M	2025-12-28	2026-02-19	10-K	26-000005
9	total debt	us-gaap:LongTermDebt	$388.2M	2024-12-29	2026-02-19	10-K	26-000005
10	book equity	us-gaap:StockholdersEquity	$1.6B	2024-12-29	2026-02-19	10-K	26-000005
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$107.1M	2024-12-29	2026-02-19	10-K	26-000005
12	net income	us-gaap:NetIncomeLoss	$151.8M	2025-12-28	2026-02-19	10-K	26-000005
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$300.5M	2025-12-28	2026-02-19	10-K	26-000005
14	assets	us-gaap:Assets	$3.1B	2024-12-29	2026-02-19	10-K	26-000005
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.7B	2025-12-28	2026-02-19	10-K	26-000005
16	gross profit	us-gaap:GrossProfit	$1.6B	2024-12-29	2026-02-19	10-K	26-000005
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.5B	2024-12-29	2026-02-19	10-K	26-000005
18	gross profit	us-gaap:GrossProfit	$1.5B	2023-12-31	2026-02-19	10-K	26-000005
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.3B	2023-12-31	2026-02-19	10-K	26-000005
20	gross profit	us-gaap:GrossProfit	$1.4B	2023-01-01	2025-02-20	10-K	25-000004
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.0B	2023-01-01	2025-02-20	10-K	25-000004
22	gross profit	us-gaap:GrossProfit	$1.2B	2022-01-02	2024-02-22	10-K	24-000004
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$3.5B	2022-01-02	2024-02-22	10-K	24-000004
24	current assets	us-gaap:AssetsCurrent	$1.7B	2025-12-28	2026-02-19	10-K	26-000005
25	current liabilities	us-gaap:LiabilitiesCurrent	$686.8M	2025-12-28	2026-02-19	10-K	26-000005
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$1.2B	2025-12-28	2026-02-19	10-K	26-000005
27	liabilities	us-gaap:Liabilities	$1.5B	2025-12-28	2026-02-19	10-K	26-000005
28	total debt	us-gaap:LongTermDebt	$558.2M	2018-12-30	2020-02-26	10-K	20-000004
29	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$17.3M	2018-12-30	2020-02-26	10-K	20-000004
30	operating income	us-gaap:OperatingIncomeLoss	$107.3M	2018-12-30	2021-03-03	10-K	21-000006
31	depreciation amortization	us-gaap:Depreciation	$21.5M	2018-12-30	2019-02-27	10-K	19-000004

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.

32	operating income	us-gaap:OperatingIncomeLoss	$250.3M	2023-12-31	2026-02-19	10-K	26-000005
33	interest expense	us-gaap:InterestExpense	$27.1M	2023-12-31	2024-02-22	10-K	24-000004
34	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$53.7M	2025-12-28	2026-02-19	10-K	26-000005
35	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$283.4M	2024-12-29	2026-02-19	10-K	26-000005
36	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$40.5M	2024-12-29	2026-02-19	10-K	26-000005
37	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$297.5M	2023-12-31	2026-02-19	10-K	26-000005
38	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$32.1M	2023-12-31	2026-02-19	10-K	26-000005
39	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$217.2M	2023-01-01	2025-02-20	10-K	25-000004
40	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$27.1M	2023-01-01	2025-02-20	10-K	25-000004
41	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$14.9M	2018-12-30	2021-03-03	10-K	21-000006
42	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$75.2M	2018-12-30	2021-03-03	10-K	21-000006
43	income tax	us-gaap:IncomeTaxExpenseBenefit	$1.3M	2018-12-30	2021-03-03	10-K	21-000006
44	current assets	us-gaap:AssetsCurrent	$765.4M	2018-12-30	2020-02-26	10-K	20-000004
45	current liabilities	us-gaap:LiabilitiesCurrent	$282.4M	2018-12-30	2020-02-26	10-K	20-000004
46	current assets	us-gaap:AssetsCurrent	$601.9M	2017-12-31	2019-02-27	10-K	19-000004
47	current liabilities	us-gaap:LiabilitiesCurrent	$205.8M	2017-12-31	2019-02-27	10-K	19-000004
48	assets	us-gaap:Assets	$2.8B	2023-12-31	2025-02-20	10-K	25-000004
49	assets	us-gaap:Assets	$2.5B	2023-01-01	2024-02-22	10-K	24-000004
50	shares outstanding	dei:EntityCommonStockSharesOutstanding	44,459,316	2026-02-13	2026-02-19	10-K	26-000005
51	shares outstanding	dei:EntityCommonStockSharesOutstanding	44,964,924	2025-02-14	2025-02-20	10-K	25-000004