Wesco International Inc.

WCC

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

B

second fifth of 253 graded peers in shops

rank 61 of 253; percentile 23.8; sampling error 3.0 points; lower is stronger

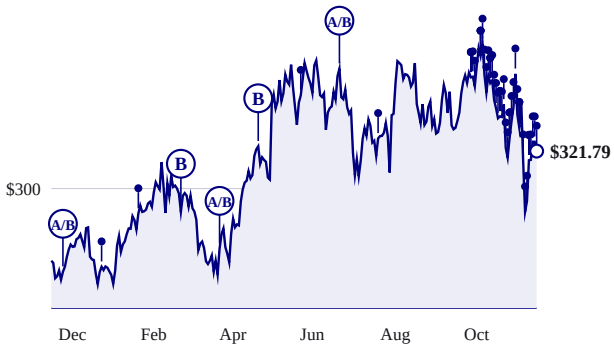
A B C D E

B, the elk



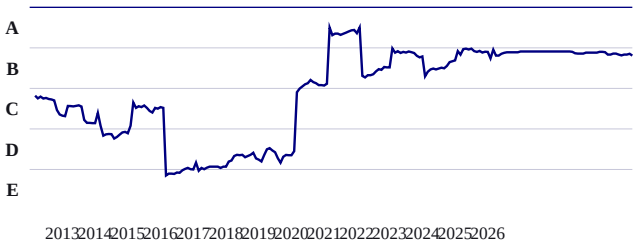
Scoreboard	
Profitability	C percentile 56.6
Solvency	A/B percentile 22.9
Growth and financing	B/C percentile 39.9
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
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: short runway, distress
Inputs computable	9 of 14
Graded from	filings received through Feb 13, 2026 274 days before the rescan; latest periodic filing 10-Q received Oct 29, 2026
Last close	$321.74 2026-11-13; market equity $15.7B; 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

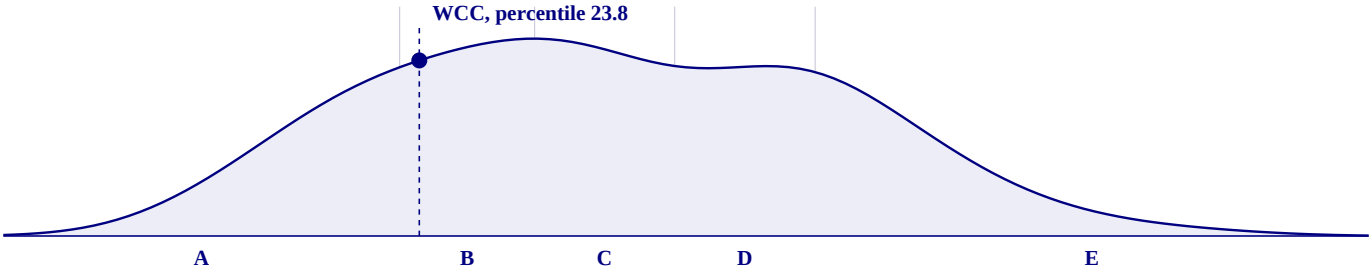
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 56.6						
Gross profitability	30.1%	42.9%		68.2	237	2025-12-31
Return on invested capital	not computable	11.2%				

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latest aligned inputs end 2018-12-31; latest annual assets end 2025-12-31					
Accruals ratio	3.3%	(4.9%)	94.7	282	2025-12-31
Gross margin stability, five years	0.4 pts	1.3 pts	7.0	215	2025-12-31
Solvency, sleeve percentile 22.9					
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	21.3	203	2025-12-31
Net debt to EBITDA	not computable	1.38x			
latest aligned inputs end 2018-12-31; latest annual assets end 2025-12-31					
Interest coverage	not computable	3.27x			
latest aligned inputs end 2014-12-31; latest annual assets end 2025-12-31					
Current ratio	2.20x	1.37x	24.6	294	2025-12-31
Growth and financing, sleeve percentile 39.9					
Revenue growth, three-year compound	3.2%	1.6%	41.1	264	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%	16.4%	22.0	151	2025-12-31
Asset growth, three years	3.7%	3.1%	45.3	266	2025-12-31
Net share issuance, one year	(0.3%)	(0.6%)	51.2	210	2026-02-12

Among 253 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
56	Arhaus, Inc. (ARHS)	21.8	A/B	
57	Buckle Inc. (BKE)	22.2	A/B	
58	Sprouts Farmers Market, Inc. (SFM)	22.6	A/B	fortress balance sheet
59	Pricesmart Inc. (PSMT)	23.0	B	fortress balance sheet
60	EVI Industries, Inc. (EVI)	23.4	B	
61	Wesco International Inc. (WCC)	23.8	B	
62	Carmax Inc. (KMX)	24.2	B	
63	Academy Sports & Outdoors, Inc. (ASO)	24.6	B	
64	Dillard'S, Inc. (DDS)	25.2	B	
65	Dillard'S, Inc. (DDT)	25.2	B	
66	ONE Group Hospitality, Inc. (STKS)	25.8	B	late filer

What the price implies

at the 2026-11-13 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	(16.2%)	(20.3%)	59
EBIT to enterprise value	7.4%	5.1%	76
Free cash flow yield	0.2%	3.8%	23

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Book value to price	0.35	0.34	50
Sales to price	1.50	1.51	49
Composite equity issuance, five years	(6.2%)	(16.9%)	66
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	16 (10-Q received Oct 29, 2026)
Median daily dollar volume, 63 sessions	$192.6M

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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