Service Corp. International

SCI

NYSE; shops; SIC 7200, Services-Personal Services; CIK 0000089089

D/E

on the D/E boundary of 253 graded peers in shops

rank 205 of 253; percentile 81.0; sampling error 3.0 points; lower is stronger

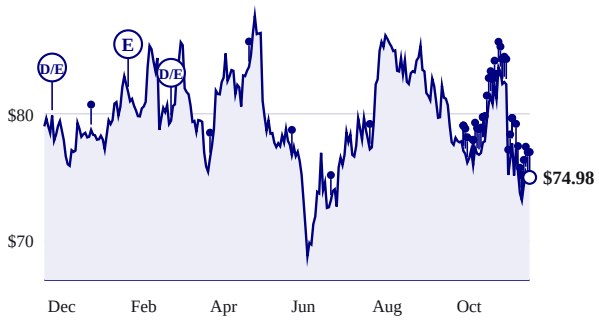
A B C D E

D/E, the sloth



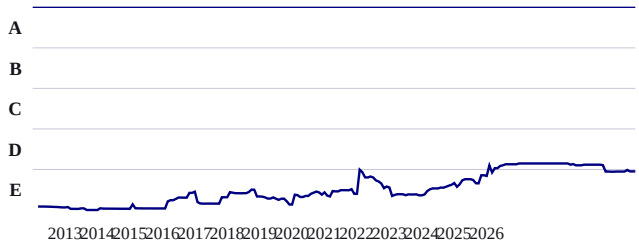
Scoreboard	
Profitability	D percentile 73.1
Solvency	D percentile 74.5
Growth and financing	B/C percentile 38.7
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $18.7B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress
Inputs computable	12 of 14
Graded from	filings received through Feb 12, 2026 277 days before the rescan; latest periodic filing 10-Q received Oct 29, 2026
Last close	$74.97 2026-11-13; market equity $10.2B; 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 12, 2026

We are North America's largest provider of deathcare products and services, with a network of funeral service locations and cemeteries unequaled in geographic scale and reach. At December 31, 2025, we operated 1,485 funeral service locations and 500 cemeteries (including 312 funeral service/cemetery combination locations), which are geographically diversified across 44 states, eight Canadian provinces, the District of Columbia, and Puerto Rico. We are well known for our Dignity Memorial® brand, North America's first transcontinental brand of deathcare products and services.

The fourteen inputs

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

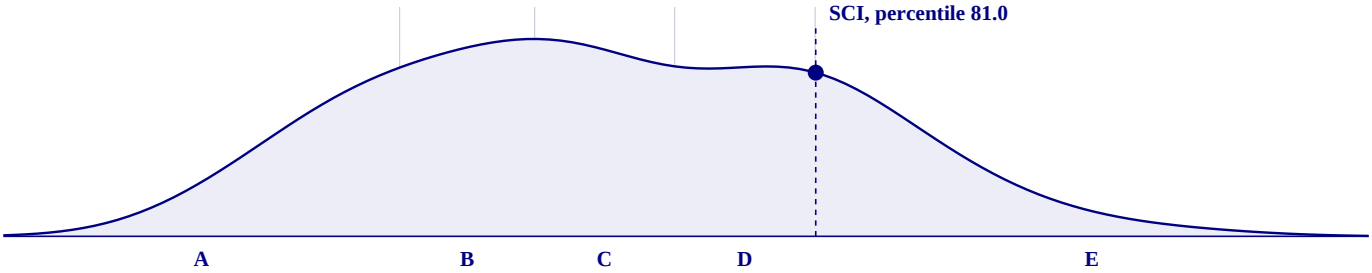
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 73.1						
Gross profitability	6.1%	42.9%		96.2	237	2025-12-31
Return on invested capital	11.5%	11.2%		47.6	83	2025-12-31
Accruals ratio	(2.2%)	(4.9%)		79.4	282	2025-12-31

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Gross margin stability, five years	2.2 pts	1.3 pts	69.2	215	2025-12-31
Solvency, sleeve percentile 74.5					
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	4.04x	1.38x	84.5	98	2025-12-31
Interest coverage	3.83x	3.27x	49.1	56	2025-12-31
Current ratio	0.55x	1.37x	89.8	294	2025-12-31
Growth and financing, sleeve percentile 38.7					
Revenue growth, three-year compound	1.6%	1.6%	49.0	264	2025-12-31
Free cash flow growth, three-year compound	6.7%	4.6%	46.3	150	2025-12-31
Reinvestment rate	24.9%	16.4%	44.7	151	2025-12-31
Asset growth, three years	7.4%	3.1%	30.6	266	2025-12-31
Net share issuance, one year	(3.5%)	(0.6%)	23.0	210	2026-02-10

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
200	Nextnrg, Inc. (NXXT)	79.0	D/E	dilution, late filer
201	Ashland Inc. (ASH)	79.4	D/E	
202	RED Robin Gourmet Burgers Inc. (RRGB)	79.8	D/E	late filer
203	Alliance Entertainment Holding Corp. (AENT)	80.4	D/E	
204	Alliance Entertainment Holding Corp. (AENTW)	80.4	D/E	
205	Service Corp. International (SCI)	81.0	D/E	
206	Restaurant Brands International Limited Partnership (QSP)	81.3	D/E	
207	Ryerson Holding Corp. (RYZ)	81.7	D/E	dilution, short runway
208	Martin Midstream Partners L.P. (MMLP)	82.1	D/E	
209	Designer Brands Inc. (DBI)	82.5	D/E	
210	RCI Hospitality Holdings, Inc. (RICK)	82.9	D/E	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	(7.6%)	(0.7%)	40
Distance from 52-week high	(14.5%)	(20.3%)	62
EBIT to enterprise value	6.5%	5.1%	65
Free cash flow yield	5.4%	3.8%	64
Book value to price	0.15	0.34	30
Sales to price	0.42	1.51	13
Composite equity issuance, five years	(30.8%)	(15.8%)	24
Relative strength against the sector, log excess return	0.01	0.08	40

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Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 6 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	fail
Current ratio improved	pass
No new shares issued	pass
Gross margin improved	pass
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$172.7M
Operating cash flow, four quarters	$1.1B
Months of runway	not finite
Days since last periodic filing	18 (10-Q received Oct 29, 2026)
Median daily dollar volume, 63 sessions	$73.5M

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	$1.1B	2025-12-31	2026-02-12	10-K	26-007695
2	assets	us-gaap:Assets	$18.7B	2025-12-31	2026-02-12	10-K	26-007695
3	operating income	us-gaap:OperatingIncomeLoss	$978.1M	2025-12-31	2026-02-12	10-K	26-007695
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$729.8M	2025-12-31	2026-02-12	10-K	26-007695
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$186.9M	2025-12-31	2026-02-12	10-K	26-007695
6	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$5.1B	2025-12-31	2026-02-12	10-K	26-007695
7	book equity	us-gaap:StockholdersEquity	$1.6B	2025-12-31	2026-02-12	10-K	26-007695
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$243.6M	2025-12-31	2026-02-12	10-K	26-007695
9	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$4.8B	2024-12-31	2026-02-12	10-K	26-007695
10	book equity	us-gaap:StockholdersEquity	$1.7B	2024-12-31	2026-02-12	10-K	26-007695
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$218.8M	2024-12-31	2026-02-12	10-K	26-007695
12	net income	us-gaap:NetIncomeLoss	$542.6M	2025-12-31	2026-02-12	10-K	26-007695
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$942.8M	2025-12-31	2026-02-12	10-K	26-007695
14	assets	us-gaap:Assets	$17.4B	2024-12-31	2026-02-12	10-K	26-007695
15	revenue	us-gaap:Revenues	$4.3B	2025-12-31	2026-02-12	10-K	26-007695
16	gross profit	us-gaap:GrossProfit	$1.1B	2024-12-31	2026-02-12	10-K	26-007695
17	revenue	us-gaap:Revenues	$4.2B	2024-12-31	2026-02-12	10-K	26-007695
18	gross profit	us-gaap:GrossProfit	$1.1B	2023-12-31	2026-02-12	10-K	26-007695
19	revenue	us-gaap:Revenues	$4.1B	2023-12-31	2026-02-12	10-K	26-007695
20	gross profit	us-gaap:GrossProfit	$1.2B	2022-12-31	2025-02-13	10-K	25-000011
21	revenue	us-gaap:Revenues	$4.1B	2022-12-31	2025-02-13	10-K	25-000011
22	gross profit	us-gaap:GrossProfit	$1.3B	2021-12-31	2024-02-13	10-K	24-000011
23	revenue	us-gaap:Revenues	$4.1B	2021-12-31	2024-02-13	10-K	24-000011
24	depreciation amortization	us-gaap:Depreciation	$219.7M	2025-12-31	2026-02-12	10-K	26-007695
25	interest expense	us-gaap:InterestExpense	$255.4M	2025-12-31	2026-02-12	10-K	26-007695
26	current assets	us-gaap:AssetsCurrent	$411.8M	2025-12-31	2026-02-12	10-K	26-007695
27	current liabilities	us-gaap:LiabilitiesCurrent	$745.7M	2025-12-31	2026-02-12	10-K	26-007695
28	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$388.6M	2025-12-31	2026-02-12	10-K	26-007695
29	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$944.9M	2024-12-31	2026-02-12	10-K	26-007695
30	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$373.7M	2024-12-31	2026-02-12	10-K	26-007695
31	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$869.0M	2023-12-31	2026-02-12	10-K	26-007695

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32	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$361.8M	2023-12-31	2026-02-12	10-K	26-007695
33	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$825.7M	2022-12-31	2025-02-13	10-K	25-000011
34	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$369.7M	2022-12-31	2025-02-13	10-K	25-000011
35	current assets	us-gaap:AssetsCurrent	$377.3M	2024-12-31	2026-02-12	10-K	26-007695
36	current liabilities	us-gaap:LiabilitiesCurrent	$723.8M	2024-12-31	2026-02-12	10-K	26-007695
37	assets	us-gaap:Assets	$16.4B	2023-12-31	2025-02-13	10-K	25-000011
38	assets	us-gaap:Assets	$15.1B	2022-12-31	2024-02-13	10-K	24-000011
39	shares outstanding	dei:EntityCommonStockSharesOutstanding	139,223,665	2026-02-10	2026-02-12	10-K	26-007695
40	shares outstanding	dei:EntityCommonStockSharesOutstanding	144,212,255	2025-02-11	2025-02-13	10-K	25-000011

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