Graco Inc.

GGG

NYSE; manufacturing; SIC 3561, Pumps & Pumping Equipment; CIK 0000042888

A

strongest fifth of 245 graded peers in manufacturing

rank 10 of 245; percentile 3.7; sampling error 3.0 points; lower is stronger

A B C D E

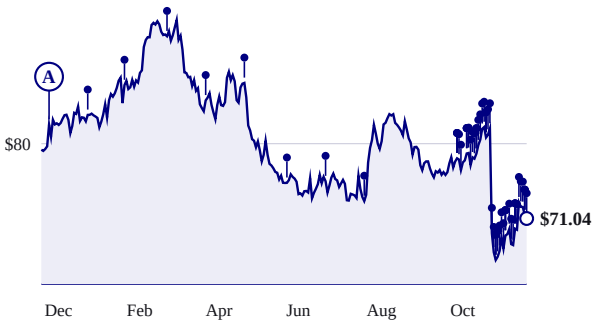
A, the bull



Scoreboard

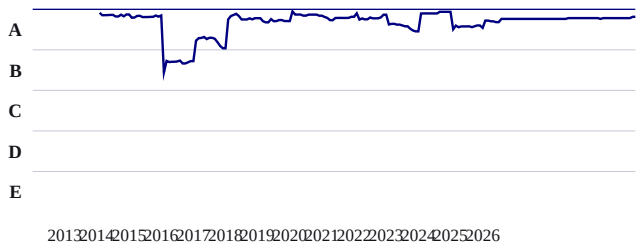
Profitability	B percentile 25.9
Solvency	B percentile 26.3
Growth and financing	B/C percentile 38.6
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $3.3B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress, fortress balance sheet
Inputs computable	9 of 13
Graded from	filings received through Feb 17, 2026 274 days before the rescan; latest periodic filing 10-Q received Oct 21, 2026
Last close	$71.06 2026-11-17; market equity $11.4B; 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 17, 2026

Graco Inc., together with its subsidiaries ("Graco," "us," "we," or "our Company"), is a multi-national manufacturing company. We supply technology and expertise for the management of fluids and coatings in industrial and commercial applications. We design, manufacture and market systems and equipment used to move, measure, mix, control, dispense and spray fluid and powder materials. Our equipment is used in manufacturing, processing, construction and maintenance industries. Graco is a Minnesota corporation and was incorporated in 1926.

The thirteen inputs

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

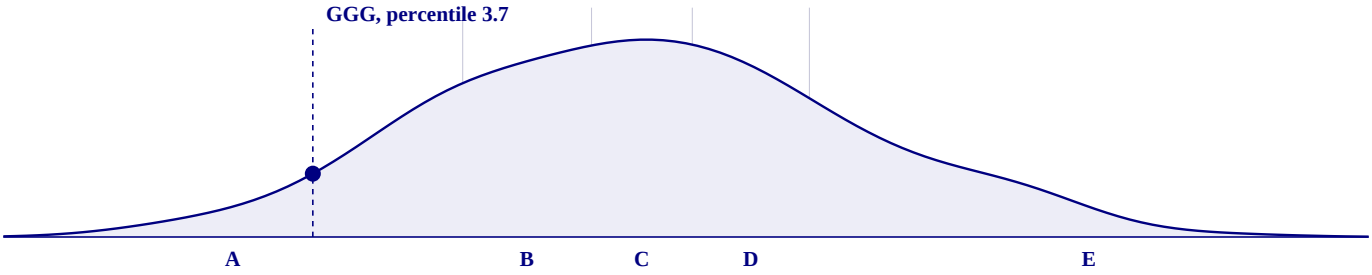
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 25.9						
Gross profitability	35.8%	22.2%		14.3	266	2025-12-26
Return on invested capital	not computable	9.9%				
one or more required annual facts are missing						

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Accruals ratio	(5.0%)	(3.7%)	40.4	286	2025-12-26
Gross margin stability, five years	1.4 pts	2.1 pts	23.1	222	2025-12-26
Solvency, sleeve percentile 26.3					
Altman Z double-prime	not computable	3.73			
one or more required annual facts are missing					
Net debt to EBITDA	not computable	1.75x			
one or more required annual facts are missing					
Interest coverage	not computable	5.13x			
latest aligned inputs end 2023-12-29; latest annual assets end 2025-12-26					
Current ratio	3.15x	2.26x	26.3	301	2025-12-26
Growth and financing, sleeve percentile 38.6					
Revenue growth, three-year compound	1.4%	2.2%	54.6	261	2025-12-26
Free cash flow growth, three-year compound	53.5%	13.5%	8.7	139	2025-12-26
Reinvestment rate	(29.3%)	25.7%	83.2	138	2025-12-26
Asset growth, three years	10.3%	4.2%	27.7	265	2025-12-26
Net share issuance, one year	(2.5%)	0.0%	18.8	241	2026-01-23

Among 245 peers

manufacturing; 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
5	Cactus, Inc. (WHD)	1.6	A	fortress balance sheet
6	Proto Labs Inc. (PRLB)	2.0	A	fortress balance sheet
7	Franklin Electric Co. Inc. (FELE)	2.5	A	
8	Energy Recovery, Inc. (ERII)	2.9	A	fortress balance sheet
9	ITT Inc. (ITT)	3.3	A	fortress balance sheet
10	Graco Inc. (GGG)	3.7	A	
11	Smith Midland Corp. (SMID)	4.1	A	late filer
12	Simpson Manufacturing Co., Inc. (SSD)	4.5	A	fortress balance sheet
13	Alamo Group Inc. (ALG)	4.9	A	fortress balance sheet
14	ACM Research, Inc. (ACMR)	5.3	A	fortress balance sheet
15	Innovex International, Inc. (INVX)	5.7	A	fortress balance sheet

What the price implies

at the 2026-11-17 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(5.0%)	9.9%	33
Distance from 52-week high	(25.1%)	(29.0%)	57
EBIT to enterprise value	not computable	4.3%	
Free cash flow yield	5.6%	3.6%	70
Book value to price	0.22	0.37	23
Sales to price	0.20	0.57	10
Composite equity issuance, five years	(12.6%)	(9.7%)	41

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Relative strength against the sector, log excess return	(0.14)	0.01	33
Twelve-month failure probability, CHS model	not computable	0.04%	

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score None of 9, period end 2025-12-26	
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	fail
No new shares issued	pass
Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$139.8M
Operating cash flow, four quarters	$659.8M
Months of runway	not finite
Days since last periodic filing	28 (10-Q received Oct 21, 2026)
Median daily dollar volume, 63 sessions	$129.9M

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	$1.2B	2025-12-26	2026-02-17	10-K	26-000081
2	assets	us-gaap:Assets	$3.3B	2025-12-26	2026-02-17	10-K	26-000081
3	net income	us-gaap:NetIncomeLoss	$521.8M	2025-12-26	2026-02-17	10-K	26-000081
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$683.6M	2025-12-26	2026-02-17	10-K	26-000081
5	assets	us-gaap:Assets	$3.1B	2024-12-27	2026-02-17	10-K	26-000081
6	revenue	us-gaap:Revenues	$2.2B	2025-12-26	2026-02-17	10-K	26-000081
7	gross profit	us-gaap:GrossProfit	$1.1B	2024-12-27	2026-02-17	10-K	26-000081
8	revenue	us-gaap:Revenues	$2.1B	2024-12-27	2026-02-17	10-K	26-000081
9	gross profit	us-gaap:GrossProfit	$1.2B	2023-12-29	2026-02-17	10-K	26-000081
10	revenue	us-gaap:Revenues	$2.2B	2023-12-29	2026-02-17	10-K	26-000081
11	gross profit	us-gaap:GrossProfit	$1.1B	2022-12-30	2025-02-18	10-K	25-000011
12	revenue	us-gaap:Revenues	$2.1B	2022-12-30	2025-02-18	10-K	25-000011
13	gross profit	us-gaap:GrossProfit	$1.0B	2021-12-31	2024-02-20	10-K	24-000010
14	revenue	us-gaap:Revenues	$2.0B	2021-12-31	2024-02-20	10-K	24-000010
15	operating income	us-gaap:OperatingIncomeLoss	$646.8M	2023-12-29	2026-02-17	10-K	26-000081
16	interest expense	us-gaap:InterestExpense	$5.2M	2023-12-29	2024-02-20	10-K	24-000010
17	current assets	us-gaap:AssetsCurrent	$1.5B	2025-12-26	2026-02-17	10-K	26-000081
18	current liabilities	us-gaap:LiabilitiesCurrent	$467.3M	2025-12-26	2026-02-17	10-K	26-000081
19	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$45.7M	2025-12-26	2026-02-17	10-K	26-000081
20	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$621.7M	2024-12-27	2026-02-17	10-K	26-000081
21	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$106.7M	2024-12-27	2026-02-17	10-K	26-000081
22	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$651.0M	2023-12-29	2026-02-17	10-K	26-000081
23	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$184.8M	2023-12-29	2026-02-17	10-K	26-000081
24	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$377.4M	2022-12-30	2025-02-18	10-K	25-000011
25	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$201.2M	2022-12-30	2025-02-18	10-K	25-000011
26	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$107.4M	2025-12-26	2026-02-17	10-K	26-000081
27	operating income	us-gaap:OperatingIncomeLoss	$624.8M	2025-12-26	2026-02-17	10-K	26-000081
28	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$641.2M	2025-12-26	2026-02-17	10-K	26-000081
29	income tax	us-gaap:IncomeTaxExpenseBenefit	$119.4M	2025-12-26	2026-02-17	10-K	26-000081

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30	current assets	us-gaap:AssetsCurrent	$1.5B	2024-12-27	2026-02-17	10-K	26-000081
31	current liabilities	us-gaap:LiabilitiesCurrent	$405.8M	2024-12-27	2026-02-17	10-K	26-000081
32	assets	us-gaap:Assets	$2.7B	2023-12-29	2025-02-18	10-K	25-000011
33	assets	us-gaap:Assets	$2.4B	2022-12-30	2024-02-20	10-K	24-000010
34	shares outstanding	dei:EntityCommonStockSharesOutstanding	165,338,302	2026-01-23	2026-02-17	10-K	26-000081
35	shares outstanding	dei:EntityCommonStockSharesOutstanding	169,493,970	2025-01-24	2025-02-18	10-K	25-000011

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