GXO Logistics, Inc.

GXO

NYSE; other; SIC 4700, Transportation Services; CIK 0001852244

E

weakest fifth of 316 graded peers in other

rank 279 of 316; percentile 88.3; sampling error 2.7 points; lower is stronger

A B C D E

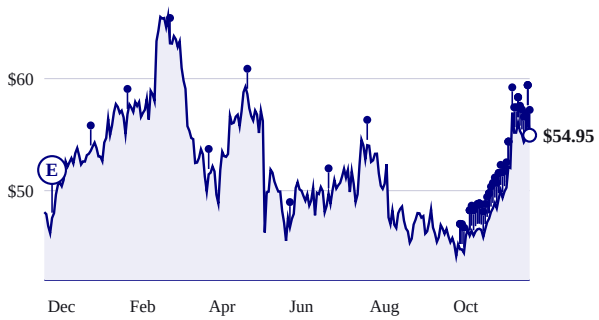
E, the bear



Scoreboard

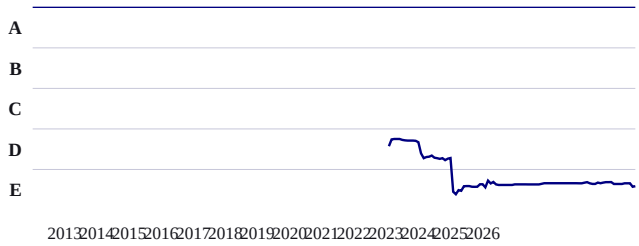
Profitability	D percentile 75.0
Solvency	D percentile 63.2
Growth and financing	C percentile 49.0
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $12.3B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress
Inputs computable	9 of 13
Graded from	filings received through Feb 25, 2026 266 days before the rescan; latest periodic filing 10-Q received Nov 4, 2026
Last close	$54.96 2026-11-17; market equity $6.2B; 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 25, 2026

GXO Logistics, Inc., together with its subsidiaries ("GXO," the "Company," "our," or "we"), is the largest pure-play contract logistics provider in the world and a foremost innovator in the industry. We provide our customers with high-value-added warehousing and distribution, order fulfillment, e-commerce, reverse logistics and other supply chain services differentiated by our ability to deliver technology-enabled, customized solutions at scale.

The thirteen inputs

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

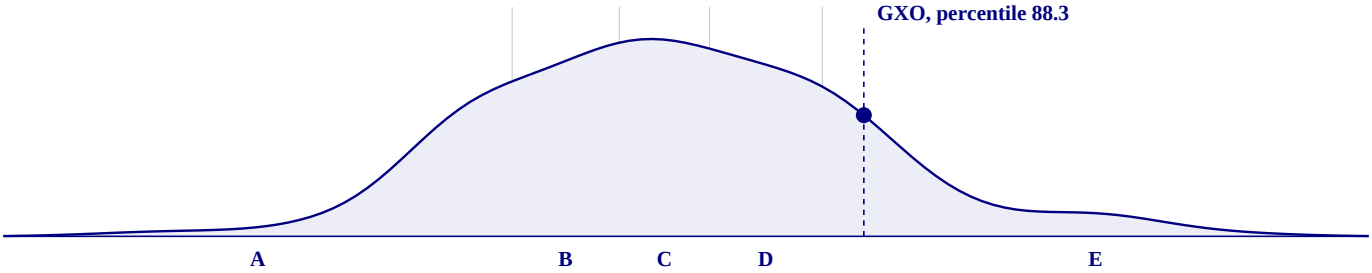
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 75.0						
Gross profitability	not computable	26.8%				
one or more required annual facts are missing						
Return on invested capital	1.7%	10.0%		81.5	147	2025-12-31
Accruals ratio	(3.4%)	(5.8%)		68.6	459	2025-12-31

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Gross margin stability, five years	not computable	2.1 pts				
five annual gross margins are required; found 0						
Solvency, sleeve percentile 63.2						
Altman Z double-prime	not computable	2.06				
one or more required annual facts are missing						
Net debt to EBITDA	2.51x	2.36x		51.4	174	2025-12-31
Interest coverage	not computable	2.93x				
latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31						
Current ratio	0.85x	1.32x		74.9	463	2025-12-31
Growth and financing, sleeve percentile 49.0						
Revenue growth, three-year compound	13.6%	5.0%		22.3	378	2025-12-31
Free cash flow growth, three-year compound	(18.1%)	8.9%		81.6	213	2025-12-31
Reinvestment rate	(202.8%)	13.3%		94.1	187	2025-12-31
Asset growth, three years	10.0%	4.0%		26.1	403	2025-12-31
Net share issuance, one year	(4.0%)	(0.5%)		21.0	353	2026-02-20

Among 316 peers

other; 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
274	CSX Corp. (CSX)	86.7	E	
275	Forward AIR Corp. (FWRD)	87.0	E	late filer
276	Comscore, Inc. (SCOR)	87.3	E	dilution
277	Xenia Hotels & Resorts, Inc. (XHR)	87.6	E	
278	Monro, Inc. (MNRO)	87.9	E	
279	GXO Logistics, Inc. (GXO)	88.3	E	
280	Enbridge Inc. (ENB)	88.6	E	
281	Plains ALL American Pipeline L.P. (PAA)	88.9	E	
282	Fidelity National Information Services, Inc. (FIS)	89.2	E	
283	Pamt Corp. (PAMT)	89.5	E	short runway
284	Ivanhoe Electric Inc. (IE)	89.8	E	

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	(20.9%)	0.06%	31
Distance from 52-week high	(16.2%)	(24.7%)	66
EBIT to enterprise value	2.9%	4.5%	30
Free cash flow yield	1.8%	4.2%	31
Book value to price	0.48	0.37	62
Sales to price	2.12	0.69	81
Composite equity issuance, five years	not computable	(9.4%)	
Relative strength against the sector, log excess return	(0.36)	(0.12)	31

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Twelve-month failure probability, CHS model	not computable	0.03%

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score None 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	pass
Current ratio improved	pass
No new shares issued	pass
Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$340.0M
Operating cash flow, four quarters	$433.0M
Months of runway	not finite
Days since last periodic filing	14 (10-Q received Nov 4, 2026)
Median daily dollar volume, 63 sessions	$56.3M

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	operating income	us-gaap:OperatingIncomeLoss	$245.0M	2025-12-31	2026-02-25	10-K	26-000007
2	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$104.0M	2025-12-31	2026-02-25	10-K	26-000007
3	income tax	us-gaap:IncomeTaxExpenseBenefit	$68.0M	2025-12-31	2026-02-25	10-K	26-000007
4	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$2.6B	2025-12-31	2026-02-25	10-K	26-000007
5	book equity	us-gaap:StockholdersEquity	$3.0B	2025-12-31	2026-02-25	10-K	26-000007
6	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$854.0M	2025-12-31	2026-02-25	10-K	26-000007
7	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$2.5B	2024-12-31	2026-02-25	10-K	26-000007
8	book equity	us-gaap:StockholdersEquity	$3.0B	2024-12-31	2026-02-25	10-K	26-000007
9	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$413.0M	2024-12-31	2026-02-25	10-K	26-000007
10	net income	us-gaap:NetIncomeLoss	$32.0M	2025-12-31	2026-02-25	10-K	26-000007
11	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$434.0M	2025-12-31	2026-02-25	10-K	26-000007
12	assets	us-gaap:Assets	$12.3B	2025-12-31	2026-02-25	10-K	26-000007
13	assets	us-gaap:Assets	$11.3B	2024-12-31	2026-02-25	10-K	26-000007
14	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$457.0M	2025-12-31	2026-02-25	10-K	26-000007
15	operating income	us-gaap:OperatingIncomeLoss	$318.0M	2023-12-31	2026-02-25	10-K	26-000007
16	interest expense	us-gaap:InterestExpense	$53.0M	2023-12-31	2024-02-15	10-K	24-000007
17	current assets	us-gaap:AssetsCurrent	$3.3B	2025-12-31	2026-02-25	10-K	26-000007
18	current liabilities	us-gaap:LiabilitiesCurrent	$3.9B	2025-12-31	2026-02-25	10-K	26-000007
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$13.2B	2025-12-31	2026-02-25	10-K	26-000007
20	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$11.7B	2024-12-31	2026-02-25	10-K	26-000007
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$9.8B	2023-12-31	2026-02-25	10-K	26-000007
22	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$9.0B	2022-12-31	2025-02-18	10-K	25-000007
23	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$324.0M	2025-12-31	2026-02-25	10-K	26-000007
24	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$549.0M	2024-12-31	2026-02-25	10-K	26-000007
25	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$359.0M	2024-12-31	2026-02-25	10-K	26-000007
26	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$558.0M	2023-12-31	2026-02-25	10-K	26-000007
27	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$274.0M	2023-12-31	2026-02-25	10-K	26-000007
28	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$542.0M	2022-12-31	2025-02-18	10-K	25-000007
29	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$342.0M	2022-12-31	2025-02-18	10-K	25-000007
30	current assets	us-gaap:AssetsCurrent	$2.6B	2024-12-31	2026-02-25	10-K	26-000007

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31	current liabilities	us-gaap:LiabilitiesCurrent	$3.2B	2024-12-31	2026-02-25	10-K	26-000007
32	assets	us-gaap:Assets	$9.5B	2023-12-31	2025-02-18	10-K	25-000007
33	assets	us-gaap:Assets	$9.2B	2022-12-31	2024-02-15	10-K	24-000007
34	shares outstanding	dei:EntityCommonStockSharesOutstanding	114,713,579	2026-02-20	2026-02-25	10-K	26-000007
35	shares outstanding	dei:EntityCommonStockSharesOutstanding	119,518,035	2025-02-13	2025-02-18	10-K	25-000007

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