MSC Industrial Direct Co. Inc.

MSM

NYSE; shops; SIC 5084, Wholesale-Industrial Machinery & Equipment; CIK 0001003078

B

second fifth of 240 graded peers in shops

rank 63 of 240; percentile 25.9; sampling error 3.0 points; lower is stronger

A B C D E

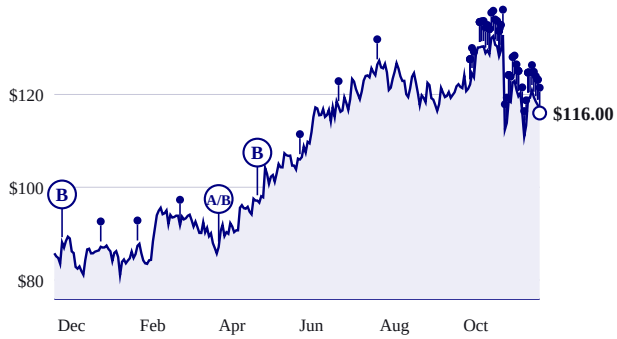
B, the elk



Scoreboard

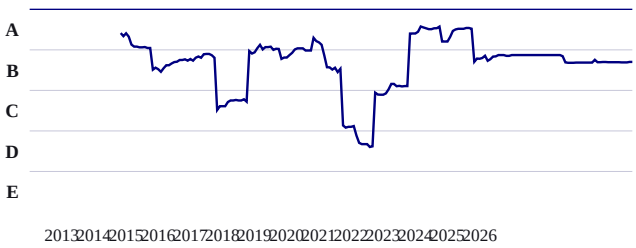
Profitability	B percentile 35.8
Solvency	B percentile 24.9
Growth and financing	C/D percentile 61.1
Reliability	0.91 AUC filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025
Peer failure rate	1.01% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$591M to $2.67B assets total assets $2.5B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress
Inputs computable	12 of 13
Graded from	filings received through Oct 22, 2026 27 days before the rescan; latest periodic filing 10-K received Oct 22, 2026
Last close	$116.09 2026-11-17; market equity $6.5B; 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 Oct 23, 2025

MSC is a leading North American distributor of a broad range of metalworking and maintenance, repair and operations ("MRO") products and services. With a history of driving innovation in industrial product distribution for more than 80 years, we help solve our manufacturing customers' metalworking and MRO challenges. Through our technical metalworking expertise and inventory management and other supply chain solutions, our team of more than 7,000 associates helps to keep our customers' manufacturing operations up and running and to improve their efficiency, productivity and profitability.

The thirteen inputs

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

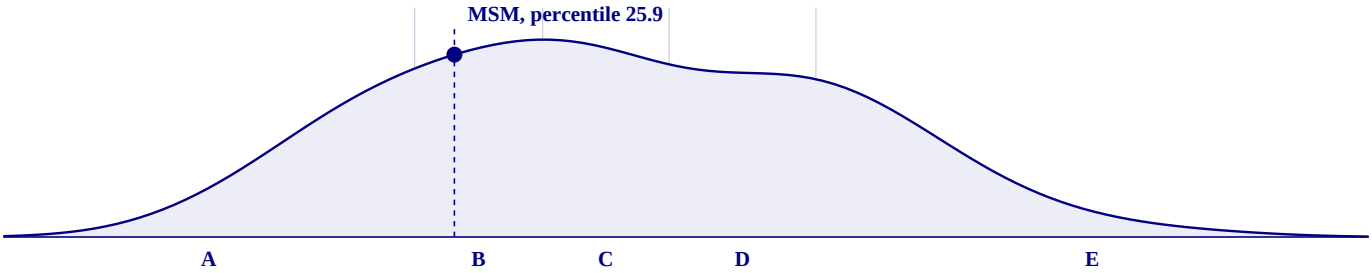
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 35.8						
Gross profitability	65.3%	43.7%		21.5	224	2026-08-29
Return on invested capital	16.0%	11.5%		36.5	75	2026-08-29
Accruals ratio	(3.4%)	(4.9%)		70.5	269	2026-08-29

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Gross margin stability, five years	0.5 pts	1.2 pts	14.9	203	2026-08-29
Solvency, sleeve percentile 24.9					
Altman Z double-prime	4.34	1.92	20.3	198	2026-08-29
Net debt to EBITDA	0.23x	1.46x	23.6	90	2026-08-29
Interest coverage	not computable	2.70x			
latest aligned inputs end 2023-09-02; latest annual assets end 2026-08-29					
Current ratio	1.78x	1.34x	30.7	275	2026-08-29
Growth and financing, sleeve percentile 61.1					
Revenue growth, three-year compound	0.00%	1.8%	57.6	251	2026-08-29
Free cash flow growth, three-year compound	(28.2%)	4.7%	91.2	138	2026-08-29
Reinvestment rate	32.9%	13.3%	37.6	142	2026-08-29
Asset growth, three years	(0.5%)	3.1%	62.5	252	2026-08-29
Net share issuance, one year	0.1%	(0.6%)	56.5	208	2026-10-01

Among 240 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
58	Pricesmart Inc. (PSMT)	23.8	B	fortress balance sheet
59	Carmax Inc. (KMX)	24.3	B	
60	Academy Sports & Outdoors, Inc. (ASO)	24.7	B	
61	ONE Group Hospitality, Inc. (STKS)	25.1	B	late filer
62	Dillard'S, Inc. (DDS)	25.5	B	
63	MSC Industrial Direct Co. Inc. (MSM)	25.9	B	
64	Shoe Station Group Inc. (SHOE)	26.4	B	
65	BJs Restaurants Inc. (BJRI)	26.8	B	
66	Hawkins Inc. (HWKN)	27.2	B	
67	Genesco Inc. (GCO)	27.6	B	fortress balance sheet
68	Williams Sonoma Inc. (WSM)	28.0	B	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	51.2%	(0.8%)	88
Distance from 52-week high	(12.7%)	(23.1%)	72
EBIT to enterprise value	4.9%	5.1%	47
Free cash flow yield	3.5%	3.9%	45
Book value to price	0.22	0.36	35
Sales to price	0.62	1.61	21
Composite equity issuance, five years	not computable	(17.1%)	
Relative strength against the sector, log excess return	0.50	0.08	88
Twelve-month failure probability, CHS model	not computable	0.04%	

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Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 8 of 9, period end 2026-08-29	
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	fail
Gross margin improved	pass
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$65.0M
Operating cash flow, four quarters	$306.5M
Months of runway	not finite
Days since last periodic filing	27 (10-K received Oct 22, 2026)
Median daily dollar volume, 63 sessions	$88.2M

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	2026-08-29	2026-10-22	10-K	26-000110
2	assets	us-gaap:Assets	$2.5B	2026-08-29	2026-10-22	10-K	26-000110
3	operating income	us-gaap:OperatingIncomeLoss	$320.6M	2026-08-29	2026-10-22	10-K	26-000110
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$292.0M	2026-08-29	2026-10-22	10-K	26-000110
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$72.1M	2026-08-29	2026-10-22	10-K	26-000110
6	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$159.8M	2026-08-29	2026-10-22	10-K	26-000110
7	book equity	us-gaap:StockholdersEquity	$1.4B	2026-08-29	2026-10-22	10-K	26-000110
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$65.0M	2026-08-29	2026-10-22	10-K	26-000110
9	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$168.8M	2025-08-30	2026-10-22	10-K	26-000110
10	book equity	us-gaap:StockholdersEquity	$1.4B	2025-08-30	2026-10-22	10-K	26-000110
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$56.2M	2025-08-30	2026-10-22	10-K	26-000110
12	net income	us-gaap:NetIncomeLoss	$222.6M	2026-08-29	2026-10-22	10-K	26-000110
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$306.5M	2026-08-29	2026-10-22	10-K	26-000110
14	assets	us-gaap:Assets	$2.5B	2025-08-30	2026-10-22	10-K	26-000110
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.0B	2026-08-29	2026-10-22	10-K	26-000110
16	gross profit	us-gaap:GrossProfit	$1.5B	2025-08-30	2026-10-22	10-K	26-000110
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$3.8B	2025-08-30	2026-10-22	10-K	26-000110
18	gross profit	us-gaap:GrossProfit	$1.6B	2024-08-31	2026-10-22	10-K	26-000110
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$3.8B	2024-08-31	2026-10-22	10-K	26-000110
20	gross profit	us-gaap:GrossProfit	$1.6B	2023-09-02	2025-10-23	10-K	25-000123
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.0B	2023-09-02	2025-10-23	10-K	25-000123
22	gross profit	us-gaap:GrossProfit	$1.6B	2022-09-03	2024-10-24	10-K	24-000107
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$3.7B	2022-09-03	2024-10-24	10-K	24-000107
24	current assets	us-gaap:AssetsCurrent	$1.3B	2026-08-29	2026-10-22	10-K	26-000110
25	current liabilities	us-gaap:LiabilitiesCurrent	$740.3M	2026-08-29	2026-10-22	10-K	26-000110
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$450.2M	2026-08-29	2026-10-22	10-K	26-000110
27	liabilities	us-gaap:Liabilities	$1.1B	2026-08-29	2026-10-22	10-K	26-000110
28	depreciation amortization	us-gaap:Depreciation	$83.8M	2026-08-29	2026-10-22	10-K	26-000110
29	operating income	us-gaap:OperatingIncomeLoss	$483.7M	2023-09-02	2025-10-23	10-K	25-000123
30	interest expense	us-gaap:InterestExpense	$22.5M	2023-09-02	2023-10-25	10-K	23-000102
31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$81.3M	2026-08-29	2026-10-22	10-K	26-000110

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32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$333.7M	2025-08-30	2026-10-22	10-K	26-000110
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$92.8M	2025-08-30	2026-10-22	10-K	26-000110
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$410.7M	2024-08-31	2026-10-22	10-K	26-000110
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$99.4M	2024-08-31	2026-10-22	10-K	26-000110
36	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$699.6M	2023-09-02	2025-10-23	10-K	25-000123
37	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$92.5M	2023-09-02	2025-10-23	10-K	25-000123
38	current assets	us-gaap:AssetsCurrent	$1.2B	2025-08-30	2026-10-22	10-K	26-000110
39	current liabilities	us-gaap:LiabilitiesCurrent	$729.3M	2025-08-30	2026-10-22	10-K	26-000110
40	assets	us-gaap:Assets	$2.5B	2024-08-31	2025-10-23	10-K	25-000123
41	assets	us-gaap:Assets	$2.5B	2023-09-02	2024-10-24	10-K	24-000107
42	shares outstanding	dei:EntityCommonStockSharesOutstanding	55,858,255	2026-10-01	2026-10-22	10-K	26-000110
43	shares outstanding	dei:EntityCommonStockSharesOutstanding	55,790,152	2025-10-02	2025-10-23	10-K	25-000123

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