Service Corp. International

SCI

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

D/E

on the D/E boundary of 240 graded peers in shops

rank 193 of 240; percentile 80.3; sampling error 3.0 points; lower is stronger

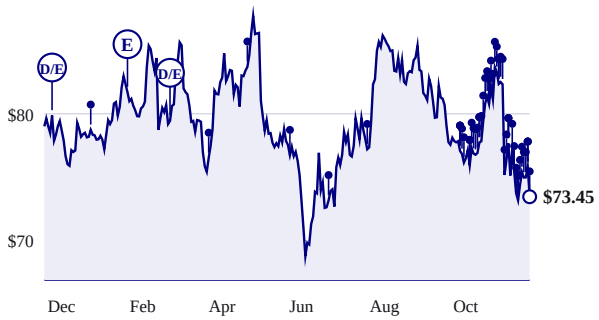


D/E, the sloth



Scoreboard	
Profitability	D percentile 73.8
Solvency	D percentile 73.8
Growth and financing	B/C percentile 39.1
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 13
Graded from	filings received through Feb 12, 2026 279 days before the rescan; latest periodic filing 10-Q received Oct 29, 2026
Last close	$73.46 2026-11-17; market equity $10.0B; 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 thirteen inputs

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

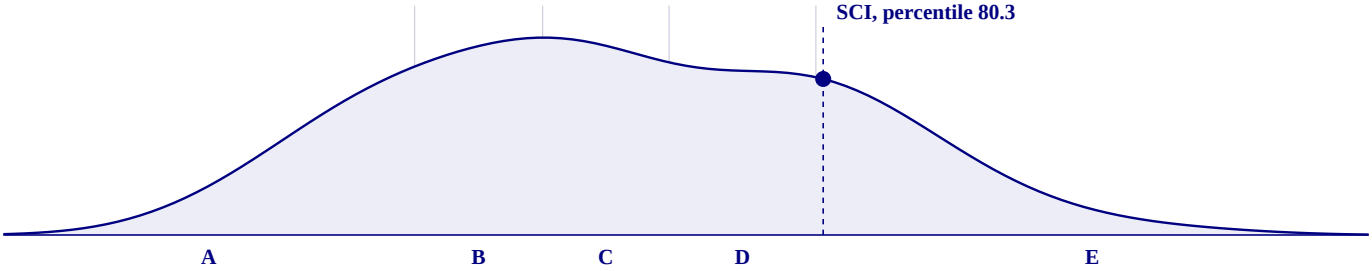
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 73.8						
Gross profitability	6.1%	43.7%		96.0	224	2025-12-31
Return on invested capital	11.5%	11.5%		50.0	75	2025-12-31
Accruals ratio	(2.2%)	(4.9%)		79.1	269	2025-12-31

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Gross margin stability, five years	2.2 pts	1.2 pts	70.3	203	2025-12-31
Solvency, sleeve percentile 73.8					
Altman Z double-prime	not computable	1.92			
one or more required annual facts are missing					
Net debt to EBITDA	4.04x	1.46x	84.3	90	2025-12-31
Interest coverage	3.83x	2.70x	47.1	52	2025-12-31
Current ratio	0.55x	1.34x	90.1	275	2025-12-31
Growth and financing, sleeve percentile 39.1					
Revenue growth, three-year compound	1.6%	1.8%	50.4	251	2025-12-31
Free cash flow growth, three-year compound	6.7%	4.7%	47.4	138	2025-12-31
Reinvestment rate	24.9%	13.3%	44.0	142	2025-12-31
Asset growth, three years	7.4%	3.1%	31.1	252	2025-12-31
Net share issuance, one year	(3.5%)	(0.6%)	22.7	208	2026-02-10

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
188	Global Partners L.P. (GLP)	78.2	D/E	
189	Alliance Entertainment Holding Corp. (AENT)	78.7	D/E	
190	GrowGeneration Corp. (GRWG)	79.1	D/E	fortress balance sheet
191	RED Robin Gourmet Burgers Inc. (RRGB)	79.5	D/E	late filer
192	Ashland Inc. (ASH)	79.9	D/E	
193	Service Corp. International (SCI)	80.3	D/E	
194	Martin Midstream Partners L.P. (MMLP)	80.8	D/E	
195	Restaurant Brands International Limited Partnership (QSP)	81.2	D/E	
196	Ryerson Holding Corp. (RYZ)	81.6	D/E	dilution, short runway
197	Designer Brands Inc. (DBI)	82.0	D/E	
198	Gold.com, Inc. (GOLD)	82.4	D/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	(7.2%)	(0.8%)	41
Distance from 52-week high	(16.3%)	(23.1%)	64
EBIT to enterprise value	6.6%	5.1%	66
Free cash flow yield	5.5%	3.9%	63
Book value to price	0.16	0.36	30
Sales to price	0.43	1.61	12
Composite equity issuance, five years	(31.3%)	(17.1%)	25
Relative strength against the sector, log excess return	0.01	0.08	41
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 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	20 (10-Q received Oct 29, 2026)
Median daily dollar volume, 63 sessions	$73.8M

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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