C. H. Robinson Worldwide, Inc.

CHRW

Nasdaq; other; SIC 4731, Arrangement of Transportation of Freight & Cargo; CIK 0001043277

B

second fifth of 316 graded peers in other

rank 98 of 316; percentile 30.8; sampling error 2.7 points; lower is stronger

A B C D E

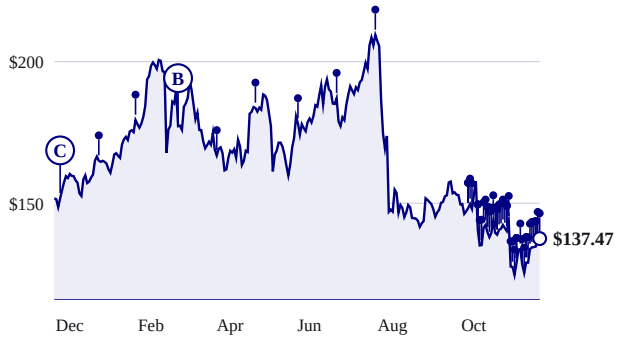
B, the elk



Scoreboard

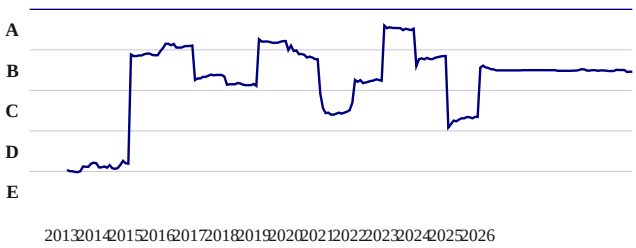
Profitability	B percentile 32.7
Solvency	B percentile 27.0
Growth and financing	D percentile 66.9
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $5.1B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress
Inputs computable	10 of 13
Graded from	filings received through Feb 13, 2026 279 days before the rescan; latest periodic filing 10-Q received Oct 30, 2026
Last close	$137.41 2026-11-18; market equity $15.9B; 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 13, 2026

C.H. Robinson Worldwide, Inc. ("C.H. Robinson," "the company," "we," "us," or "our") is one of the largest global logistics providers in the world, with consolidated total revenues of $16.2 billion in 2025. As a leader in Lean artificial intelligence ("AI") supply chains, we deliver logistics like no one else. For more than a century, companies everywhere have looked to us to reimagine how goods move. We deliver tailored solutions across the world via truckload, less-than-truckload, ocean, air, and more. With our unique combination of human insight and Lean AI working as one, supply chains move faster, smarter, and more sustainably.

The thirteen inputs

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

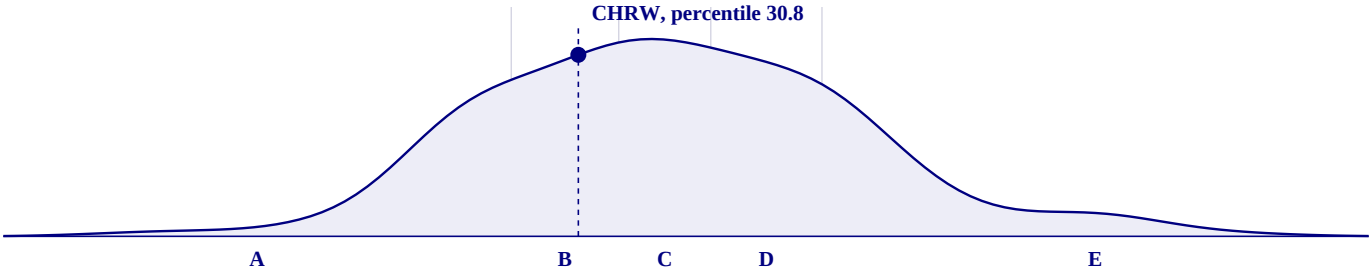
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 32.7						
Gross profitability	not computable	26.8%				
one or more required annual facts are missing						
Return on invested capital	22.6%	10.0%		18.5	147	2025-12-31

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Accruals ratio	(6.3%)	(5.8%)	46.8	458	2025-12-31
Gross margin stability, five years	not computable	2.1 pts			
five annual gross margins are required; found 0					
Solvency, sleeve percentile 27.0					
Altman Z double-prime	6.83	2.06	9.2	358	2025-12-31
Net debt to EBITDA	1.12x	2.36x	30.1	174	2025-12-31
Interest coverage	not computable	2.93x			
one or more required annual facts are missing					
Current ratio	1.53x	1.32x	41.6	463	2025-12-31
Growth and financing, sleeve percentile 66.9					
Revenue growth, three-year compound	(13.1%)	5.0%	90.7	377	2025-12-31
Free cash flow growth, three-year compound	(17.4%)	8.9%	80.7	213	2025-12-31
Reinvestment rate	47.9%	13.3%	33.9	187	2025-12-31
Asset growth, three years	(5.3%)	4.0%	82.3	402	2025-12-31
Net share issuance, one year	(0.07%)	(0.6%)	46.9	353	2026-02-11

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
93	Landstar System Inc. (LSTR)	29.2	B	late filer, fortress balance sheet
94	HireQuest, Inc. (HQI)	29.5	B	
95	Planet Fitness, Inc. (PLNT)	29.8	B	
96	Bgsf, Inc. (BGSF)	30.2	B	late filer
97	National CineMedia, Inc. (NCMI)	30.5	B	fortress balance sheet
98	C. H. Robinson Worldwide, Inc. (CHRW)	30.8	B	
99	Vulcan Materials Co. (VMC)	31.1	B	
100	Charles River Laboratories International, Inc. (CRL)	31.4	B	
101	Limbach Holdings, Inc. (LMB)	31.7	B	
102	Criteo S.A. (CRTO)	32.1	B	fortress balance sheet
103	Datavault AI Inc. (DVLT)	32.4	B	dilution, short runway, late filer, fortress balance sheet

What the price implies

at the 2026-11-18 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(2.5%)	0.06%	49
Distance from 52-week high	(34.4%)	(23.9%)	37
EBIT to enterprise value	4.5%	4.5%	50
Free cash flow yield	5.6%	4.0%	61
Book value to price	0.10	0.37	16
Sales to price	1.02	0.69	61
Composite equity issuance, five years	(27.3%)	(9.4%)	18

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Relative strength against the sector, log excess return	(0.15)	(0.12)	49
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	pass
Operating cash flow exceeds net income	pass
Long-term leverage fell	fail
Current ratio improved	pass
No new shares issued	pass
Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$193.1M
Operating cash flow, four quarters	$534.0M
Months of runway	not finite
Days since last periodic filing	20 (10-Q received Oct 30, 2026)
Median daily dollar volume, 63 sessions	$203.8M

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	operating income	us-gaap:OperatingIncomeLoss	$795.0M	2025-12-31	2026-02-13	10-K	26-000009
2	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$722.5M	2025-12-31	2026-02-13	10-K	26-000009
3	income tax	us-gaap:IncomeTaxExpenseBenefit	$135.4M	2025-12-31	2026-02-13	10-K	26-000009
4	total debt	us-gaap:LongTermDebt	$1.1B	2025-12-31	2026-02-13	10-K	26-000009
5	book equity	us-gaap:StockholdersEquity	$1.8B	2025-12-31	2026-02-13	10-K	26-000009
6	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$160.9M	2025-12-31	2026-02-13	10-K	26-000009
7	total debt	us-gaap:LongTermDebt	$1.4B	2024-12-31	2026-02-13	10-K	26-000009
8	book equity	us-gaap:StockholdersEquity	$1.7B	2024-12-31	2026-02-13	10-K	26-000009
9	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$145.8M	2024-12-31	2026-02-13	10-K	26-000009
10	net income	us-gaap:NetIncomeLoss	$587.1M	2025-12-31	2026-02-13	10-K	26-000009
11	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$914.5M	2025-12-31	2026-02-13	10-K	26-000009
12	assets	us-gaap:Assets	$5.1B	2025-12-31	2026-02-13	10-K	26-000009
13	assets	us-gaap:Assets	$5.3B	2024-12-31	2026-02-13	10-K	26-000009
14	current assets	us-gaap:AssetsCurrent	$2.8B	2025-12-31	2026-02-13	10-K	26-000009
15	current liabilities	us-gaap:LiabilitiesCurrent	$1.8B	2025-12-31	2026-02-13	10-K	26-000009
16	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$6.1B	2025-12-31	2026-02-13	10-K	26-000009
17	liabilities	us-gaap:Liabilities	$3.2B	2025-12-31	2026-02-13	10-K	26-000009
18	depreciation amortization	us-gaap:Depreciation	$32.5M	2025-12-31	2026-02-13	10-K	26-000009
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$16.2B	2025-12-31	2026-02-13	10-K	26-000009
20	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$17.7B	2024-12-31	2026-02-13	10-K	26-000009
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$17.6B	2023-12-31	2026-02-13	10-K	26-000009
22	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$24.7B	2022-12-31	2025-02-14	10-K	25-000012
23	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$19.6M	2025-12-31	2026-02-13	10-K	26-000009
24	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$509.1M	2024-12-31	2026-02-13	10-K	26-000009
25	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$22.7M	2024-12-31	2026-02-13	10-K	26-000009
26	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$731.9M	2023-12-31	2026-02-13	10-K	26-000009
27	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$30.0M	2023-12-31	2026-02-13	10-K	26-000009
28	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$1.7B	2022-12-31	2025-02-14	10-K	25-000012
29	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$61.9M	2022-12-31	2025-02-14	10-K	25-000012

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30	current assets	us-gaap:AssetsCurrent	$3.0B	2024-12-31	2026-02-13	10-K	26-000009
31	current liabilities	us-gaap:LiabilitiesCurrent	$2.3B	2024-12-31	2026-02-13	10-K	26-000009
32	assets	us-gaap:Assets	$5.2B	2023-12-31	2026-02-13	10-K	26-000009
33	assets	us-gaap:Assets	$6.0B	2022-12-31	2025-02-14	10-K	25-000012
34	shares outstanding	dei:EntityCommonStockSharesOutstanding	118,620,833	2026-02-11	2026-02-13	10-K	26-000009
35	shares outstanding	dei:EntityCommonStockSharesOutstanding	118,705,622	2025-02-12	2025-02-14	10-K	25-000012

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