GEO Group Inc.

GEO

NYSE; other; SIC 1520, General Bldg Contractors - Residential Bldgs; CIK 0000923796

D

fourth fifth of 316 graded peers in other

rank 230 of 316; percentile 72.7; sampling error 2.7 points; lower is stronger

A B C D E

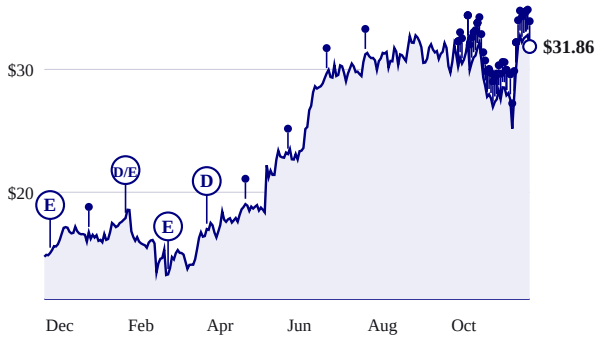
D, the sloth



Scoreboard

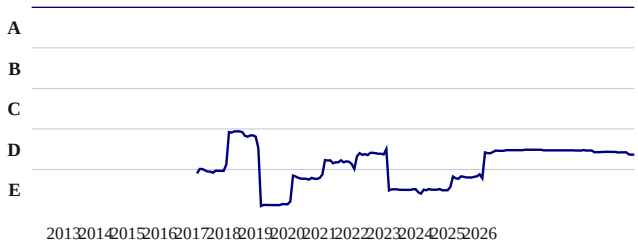
Profitability	D/E percentile 80.5
Solvency	C percentile 52.8
Growth and financing	B percentile 36.7
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $3.8B
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 267 days before the rescan; latest periodic filing 10-Q received Nov 6, 2026
Last close	$31.86 2026-11-18; market equity $4.2B; 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

As used in this report, the terms "we," "us," "our," "GEO" and the "Company" refer to The GEO Group, Inc., its consolidated subsidiaries and its unconsolidated affiliates, unless otherwise expressly stated or the context otherwise requires. We specialize in the ownership, leasing and management of secure facilities, processing centers and reentry facilities and the provision of community-based services in the United States, Australia and South Africa. We own, lease and operate a broad range of secure facilities including maximum, medium and minimum-security facilities, processing centers, as well as community-based reentry facilities.

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 80.5						
Gross profitability	not computable	26.8%				
one or more required annual facts are missing						

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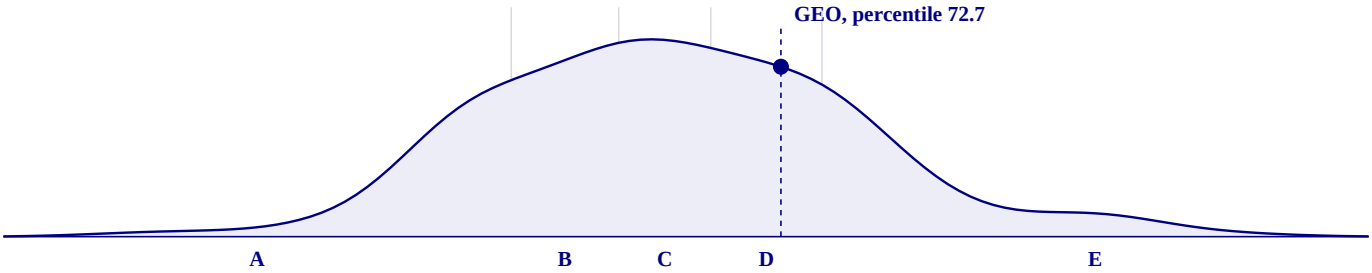
Return on invested capital	6.3%	10.0%	68.5	147	2025-12-31
Accruals ratio	4.9%	(5.8%)	92.6	458	2025-12-31
Gross margin stability, five years	not computable	2.1 pts			
five annual gross margins are required; found 0					
Solvency, sleeve percentile 52.8					
Altman Z double-prime	not computable	2.06			
one or more required annual facts are missing					
Net debt to EBITDA	4.11x	2.36x	74.6	174	2025-12-31
Interest coverage	1.60x	2.93x	55.8	78	2025-12-31
Current ratio	2.01x	1.32x	27.9	463	2025-12-31
Growth and financing, sleeve percentile 36.7					
Revenue growth, three-year compound	3.5%	5.0%	54.8	377	2025-12-31
Free cash flow growth, three-year compound	not computable	8.9%			
current FCF must be positive and base FCF must exceed $100,000					
Reinvestment rate	139.4%	13.3%	8.6	187	2025-12-31
Asset growth, three years	0.7%	4.0%	65.1	402	2025-12-31
Net share issuance, one year	(4.3%)	(0.6%)	18.5	353	2026-02-23

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
225	Aecom (ACM)	71.1	D	
226	Payoneer Global Inc. (PAYO)	71.4	D	
227	DLH Holdings Corp. (DLHC)	71.7	D	
228	Alight, Inc. Delaware (ALIT)	72.1	D	
229	Iqvia Holdings Inc. (IQV)	72.4	D	
230	GEO Group Inc. (GEO)	72.7	D	
231	Royal Caribbean Cruises Ltd. (RCL)	73.0	D	
232	Travel & Leisure Co. (TNL)	73.3	D	
233	Priority Technology Holdings, Inc. (PRTH)	73.7	D	
234	Monarch Casino & Resort Inc. (MCRI)	74.0	D	
235	Genco Shipping & Trading Ltd. (GNK)	74.3	D	

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	79.6%	0.06%	93
Distance from 52-week high	(2.9%)	(23.9%)	91
EBIT to enterprise value	4.5%	4.5%	50
Free cash flow yield	(3.0%)	4.0%	19
Book value to price	0.37	0.37	50
Sales to price	0.62	0.69	46

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Composite equity issuance, five years	8.7%	(9.4%)	76
Relative strength against the sector, log excess return	0.46	(0.12)	93
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	fail
Long-term leverage fell	pass
Current ratio improved	pass
No new shares issued	pass
Gross margin improved	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$216.0M
Operating cash flow, four quarters	$328.1M
Months of runway	not finite
Days since last periodic filing	13 (10-Q received Nov 6, 2026)
Median daily dollar volume, 63 sessions	$71.6M

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	$257.5M	2025-12-31	2026-02-25	10-K	26-071747
2	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$335.5M	2025-12-31	2026-02-25	10-K	26-071747
3	income tax	us-gaap:IncomeTaxExpenseBenefit	$85.7M	2025-12-31	2026-02-25	10-K	26-071747
4	total debt	us-gaap:LongTermDebt	$1.7B	2025-12-31	2026-02-25	10-K	26-071747
5	book equity	us-gaap:StockholdersEquity	$1.5B	2025-12-31	2026-02-25	10-K	26-071747
6	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$69.0M	2025-12-31	2026-02-25	10-K	26-071747
7	total debt	us-gaap:LongTermDebt	$1.7B	2024-12-31	2025-02-28	10-K	25-029972
8	book equity	us-gaap:StockholdersEquity	$1.3B	2024-12-31	2026-02-25	10-K	26-071747
9	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$76.9M	2024-12-31	2026-02-25	10-K	26-071747
10	net income	us-gaap:NetIncomeLoss	$254.4M	2025-12-31	2026-02-25	10-K	26-071747
11	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$72.6M	2025-12-31	2026-02-25	10-K	26-071747
12	assets	us-gaap:Assets	$3.8B	2025-12-31	2026-02-25	10-K	26-071747
13	assets	us-gaap:Assets	$3.6B	2024-12-31	2026-02-25	10-K	26-071747
14	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$132.0M	2025-12-31	2026-02-25	10-K	26-071747
15	interest expense	us-gaap:InterestExpense	$160.5M	2025-12-31	2026-02-25	10-K	26-071747
16	current assets	us-gaap:AssetsCurrent	$718.5M	2025-12-31	2026-02-25	10-K	26-071747
17	current liabilities	us-gaap:LiabilitiesCurrent	$356.9M	2025-12-31	2026-02-25	10-K	26-071747
18	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$2.6B	2025-12-31	2026-02-25	10-K	26-071747
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$2.4B	2024-12-31	2026-02-25	10-K	26-071747
20	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$2.4B	2023-12-31	2026-02-25	10-K	26-071747
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$2.4B	2022-12-31	2025-02-28	10-K	25-029972
22	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$197.5M	2025-12-31	2026-02-25	10-K	26-071747
23	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$242.2M	2024-12-31	2026-02-25	10-K	26-071747
24	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$78.7M	2024-12-31	2026-02-25	10-K	26-071747
25	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$277.8M	2023-12-31	2026-02-25	10-K	26-071747
26	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$73.0M	2023-12-31	2026-02-25	10-K	26-071747
27	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$288.0M	2022-12-31	2025-02-28	10-K	25-029972

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28	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$90.0M	2022-12-31	2025-02-28	10-K	25-029972
29	current assets	us-gaap:AssetsCurrent	$500.2M	2024-12-31	2026-02-25	10-K	26-071747
30	current liabilities	us-gaap:LiabilitiesCurrent	$340.2M	2024-12-31	2026-02-25	10-K	26-071747
31	assets	us-gaap:Assets	$3.7B	2023-12-31	2025-02-28	10-K	25-029972
32	assets	us-gaap:Assets	$3.8B	2022-12-31	2024-02-29	10-K	24-023181
33	shares outstanding	dei:EntityCommonStockSharesOutstanding	134,361,648	2026-02-23	2026-02-25	10-K	26-071747
34	shares outstanding	dei:EntityCommonStockSharesOutstanding	140,379,419	2025-02-24	2025-02-28	10-K	25-029972

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